

2021 EDUCATION INITIATIVE  
BOSTON REQUEST FOR PROPOSALS

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Liberty Mutual Foundation



**Liberty Mutual**<sup>®</sup>  
INSURANCE

## General Information

### Background

Liberty Mutual Foundation launched its Education Initiative in the fall of 2007. Since then, through this initiative, the Foundation has awarded over \$21 million to 121 Boston nonprofit organizations with proven positive results in creating and expanding academic opportunities for youth.

Applicants are encouraged to review the Liberty Mutual Foundation [Philanthropy website](#), which includes a copy of our most recent Giving Report, to familiarize themselves with the types of programs the Foundation supports. The Liberty Mutual Foundation will keep its current geographic scope and intends to support organizations offering programs and services to underserved children and youth in low-income neighborhoods in Boston proper.

### Initiative Timeline

Release Date: April 15, 2021  
Proposal Deadline: May 20, 2021  
Interim Report Due: June 1, 2022  
Final Report Due: June 1, 2023

### Goals of the Education Initiative

The goals of the Liberty Mutual Foundation Education Initiative are to improve the educational achievement of underserved youth in the city of Boston, Massachusetts. Efforts should also expand educational opportunities for children and youth using solutions vetted with input from those involved. Furthermore, the Education Initiative intends to locate and support educational programs at all grade levels that seek to build on prior academic success and that highlight a path to postsecondary education and/or career training. The Liberty Mutual Foundation aims to achieve these goals by funding nonprofits to take some of the following actions:

1. Creating programs and initiatives to address pandemic related academic issues, especially for students of color who came into the pandemic with the fewest opportunities and will experience the greatest learning loss. This includes programs serving early education and K-12 aimed at Social and Emotional Learning, mental health issues, tutoring, remote learning, and efforts to accelerate learning.
2. Expanding academic opportunities for low-income and limited English-proficient (LEP) students by funding out-of-school-time educational programs, in-school extended learning programs, programs that ensure a successful transition to high school, vocational and technical training programs, and programs that emphasize and highlight the path to college success or further education.
3. Implementing programs that foster school readiness, as well as elementary and middle school programs that seek to prevent the achievement gap by employing results-based curricula and focusing on basic literacy and/or numeracy.
4. Supporting programs that create pathways for older youth and young adults ages 16 to 24 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 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 pull-out programs or activities outside of school settings.
2. Organizations whose intent is to assist low-income students in succeeding in pre-K to 12th grade and to help high school graduates attain postsecondary education—which may include vocational or technical training. Preference will be given to organizations that also provide support to ensure students successfully complete postsecondary education or training.
3. Organizations that administer youth and adolescent English language-learning programs as a means to bolster student academic performance and social opportunities.
4. Organizations serving students who reside in Boston.
5. Not-for-profit organizations with current 501(c) (3) status.
6. **Organizations that are current recipients of a grant through the 2019 Liberty Education Initiative are eligible to apply. Other organizations that have received an annual or multi-year Liberty Mutual grant within the past 12 months should contact foundation staff regarding eligibility.**

## Funding Availability and Grant Size

The amount of funding that will be dedicated to this initiative, or to specific program models within the initiative, has not been predetermined. Instead, funding levels will be informed by the type, number and quality of proposals submitted. In the last funding cycle for this RFP, the average grant amount was \$40,000 per year. Applicants are encouraged to review the Liberty Mutual Foundation [Philanthropy website](#), which includes a copy of our most recent Giving Report, to familiarize themselves with the type and size of educational grants the Foundation made during the previous initiative.

## Funding Cycle

The Liberty Mutual Foundation Education Initiative operates on a two-year cycle. Grantees selected through this RFP will receive a commitment for two years of funding, pending availability of funds and a successful review of an interim report. **This report, due on June 1, 2022**, will be required to access second-year funding.

New Education Initiative grant proposals will not be accepted in 2022. The next Education Initiative RFP will likely be released in 2023.

## 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 children or 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;
  - Organizational capacity, diversity, governance, history and reputation;
  - Other ancillary and complementary programs sponsored by the organization; and
  - Other program funding sources and 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.
2. **Program Quality and Past Performance:** Applicants must thoroughly demonstrate the effectiveness of their program(s) in assisting low-income and/or LEP youth. The Foundation is also interested in the skills and training of the program staff. The Liberty Mutual Foundation supports organizations with a demonstrated track record of improving educational opportunities for Boston youth.
3. **Organizational Capacity:** The Liberty Mutual Foundation Education Initiative aims to provide direct services to Boston youth through education-focused nonprofits. To that end, preference will be given to applicants that can demonstrate a thoroughly 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 the 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.

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**

- 1) A brief Metrics Verification Report sent close to the date of announced funding that will level-set available funding and project data.
- 2) An Interim Report by June 1, 2022, completed on time for review, in order to access second-year funding.
- 3) A Final Report that specifically details the achievements, outcomes and opportunities made possible by this grant will also be expected by June 1, 2023.

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 course of the reporting period (*final report only*).

See the **Appendix** to this document for an example of the interim (year one) report.

### **Proposal Deadline and Grant Announcements**

Proposals for the Liberty Mutual Foundation Education Initiative should be electronically submitted by 11:59 p.m. on **Thursday, May 20, 2021**. Late applications, incomplete applications and applications not appropriately completed will not be considered.

Grant awards will be announced by August 2021.

### **Conference Call**

Applicants are invited to participate in a Zoom call on **Wednesday, April 21<sup>st</sup> at 4:00 p.m. (Eastern Time)** to answer questions related to the RFP requirements and process. Participation is not required to apply, but the call will not be recorded, and minutes will not be distributed.

Join Zoom Meeting

<https://libertymutual.zoom.us/j/91635204903?pwd=N0xUdWwyZFZPZWJjZEVxakhLam1rQT09>

Meeting ID: 916 3520 4903

Passcode: 455133

### **Questions**

Questions about this request for proposals should be directed to [Foundation@LibertyMutual.com](mailto:Foundation@LibertyMutual.com).

## **Proposal Questions, Format and Procedures**

**The online application can be accessed through the following link:**

## [2021 Liberty Mutual Foundation Education Initiative Application](#)

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 only 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 (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 funding for operating support, please describe the organization's mission, goals and impact.**

#### 3. Community Needs, Target Population and Identifying Program Participants

What issue do you plan to address? What research supports your ideas? What changes are you planning in response to COVID-19? 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. 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 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 pandemic related academic issues,
- Expanding academic opportunities for low-income and ELL students;
- Preventing the achievement gap by employing results-based curricula, focusing on school readiness and basic literacy or numeracy;
- Train and prepare youth for pathways to college and/or career.

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 are leading 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 as a result of your activity?)  
**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. ***Not all fields will be relevant to your program. If needed, you may create your own metrics; however, we encourage you to include no more than three self-defined metrics.***

**If your request is funded**, you will be asked to provide actual program outcomes when completing your interim and final impact reports. You will also have the opportunity to update your estimated outcomes based on your final award amount in the Metrics Verification Report.

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

## 7. Demographic Information Requested

- Total number served by the organization and by the program for which funds are requested
- Proposed number of program participants (based on requested grant amount)
- Age and academic level(s) served by the program
- Genders to be 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 Information and Requested Documents

- 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 2019-20 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 2019-20 Education Initiative grant **prior to** submitting a proposal through this RFP. A final report for your 2019-20 grant is due by June 1, 2021, and you will receive instructions on when and how to access the online impact report. **As a rule**, we 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?**

Organizations may be ineligible to participate in the Education Initiative if they have received discretionary funding from Liberty Mutual in the past 12 months. If your organization is a current grantee of the Foundation, please contact staff prior to beginning your work on this RFP.
- 3. The RFP targets the city of Boston. While our organization is not located in Boston, we serve students from there. Can we apply?**

Our goal is to expand educational opportunities for participants in Boston. Organizations established outside of the city can apply as long as they provide services to **more than 50% of Boston’s stakeholders**. However, since we are also trying to contribute to the capacity of area nonprofits, applicants from Greater Boston or elsewhere may not be our highest priority even if they serve a large number of Boston students. Alternatively, applicant organizations may request support for programs targeting only students from Boston, but this may still be a lesser priority.
- 4. Our organization serves Greater Boston. Does this match the Foundation’s geographic focus area?**

No. Our target population is students residing within the city boundaries of Boston.
- 5. What is the maximum/minimum amount that our organization can request through this RFP?**

A grant range has not been predetermined. Please refer to the Foundation’s [Philanthropy website](#) for an idea about the type and size of grants the Foundation makes.
- 6. Should our request amount and proposal information cover two full years of programming?**

No. While we are committed to providing level, second-year grants to successful applicants in 2022, these funds are contingent upon the successful completion and review of an organization’s interim impact report, due June 1, 2022.
- 7. 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](mailto:Foundation@LibertyMutual.com). Please keep in mind that the RFP is a competitive process and that we are unable to “pre-vet” applications.

## Education Initiative Interim (Year One) Report

### 1. Start Report Period / End Report Period

Please enter the start and end dates for the grant 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 – Year 1

Referring to the **first** Program Activity and Expected Outcomes described in your application, please provide the **Actual Outcomes** achieved as a result of this activity during the grant period.

### 6. Program Activity (2) Outcomes – Year 1

Referring to the **second** Program Activity and Expected Outcomes described in your application (if any), please provide the **Actual Outcomes** achieved as a result of this activity during the grant period.

### 7. Program Activity (3) Outcomes – Year 1

Referring to the **third** Program Activity and Expected Outcomes described in your application (if any), please provide the **Actual Outcomes** achieved as a result of this activity during the grant period.

### 8. Education Metrics – Outcomes

Referring to the following predefined metrics and your program's anticipated outcomes made possible by this grant, please update the following metric fields with **actual outcomes** achieved during the grant period.

- # students improving pre-school skills
- # students screened for phonics recognition or reading fluency
- # students increasing vocabulary
- # students improving literacy and/or numeracy (measured by standard assessment tool)
- # students exceeding 80% school attendance
- # students graduating middle school on time
- # students entering rigorous college-prep high school
- # youth engaging in constructive learning or experiential education
- # program hours spent on academic enrichment
- # English Language Learner students transitioning to general education classrooms
- # English Language Learner students achieving proficiency (measured by standardized test, e.g., WIDA)
- # students re-engaging in high school or GED program
- # students obtaining a GED
- # students graduating high school
- # students enrolling in college
- # students graduating from college
- # students enrolling in postsecondary education/training programs
- # students obtaining industry-specific/recognized certification
- # program graduates obtaining employment
- # enrolling in programs and services promoting inclusion for people with disabilities
- # enrolling in industry-recognized occupational training program(s) for people with disabilities