

2024 COMMUNITY FUNDING GUIDE

TEXAS MUTUAL INSURANCE COMPANY



ABOUT OUR 2024 FUNDING COMMITMENT

At Texas Mutual, we care for hardworking Texans. We do that every day by protecting businesses, promoting safe working environments and helping ensure Texas workers get home safely to their families. Our mission is to create a stronger, safer Texas—and it’s a job we take seriously. That’s why we’ve invested over \$60 million into our communities since 2016 and continue to commit our resources to ensure meaningful change for current and future Texans.

In 2024, Texas Mutual is committing \$8 million through two Request for Proposal (RFP) initiatives. The first RFP for **Generational Learning** opens on April 15 and will seek to support working families to ensure they have the resources they need to achieve economic stability. This funding cycle will invest in nonprofit organizations that are focused on improving health and wellness and expanding access to child care. We will also consider nonprofits that are supporting clients by providing or coordinating integrated care that addresses multiple barriers. The second RFP for **Workforce Development and Safety Training** opens on August 19 and will invest in upskilling, apprenticeships and safety training programs.

We believe the best thing about Texas is how Texans rally to support each other in times of need. Whether it’s a hurricane, winter storm or a pandemic — taking care of each other is at our core. As a company that exclusively does business in this great state, Texas Mutual and its employees share in that philosophy. That’s why we have an unwavering commitment to creating stronger, safer and more resilient communities.

GRANT CYCLE #1: GENERATIONAL LEARNING

Cultivating resiliency and stability for working families

GRANT CYCLE #2: WORKFORCE DEVELOPMENT AND SAFETY TRAINING

Fortifying businesses to strengthen the Texas economy



GRANT CYCLE #1: GENERATIONAL LEARNING

Cultivating resiliency and stability for working families

Texas Mutual is seeking to invest in initiatives that support generational impact in its effort to build a stronger, safer Texas for working families. For the first RFP grant cycle, we're looking for organizations focused on:

- Improving the health and wellness of Texas workers and their families by providing access to quality care and health education
- Strengthening the early childhood education system by ensuring child care providers have the resources needed to deliver access to affordable, quality education for Texas families
- Providing holistic wraparound support for clients in addition to case management to ensure families have the resources they need to seize opportunities

Applications will be accepted between 8 a.m. CDT on **Monday, April 15** and 11:59 p.m. CDT on **Friday, May 24**.

Join our informational webinar on April 24 to hear from the community affairs team. [Register here](#).



GRANT CYCLE #2: WORKFORCE DEVELOPMENT AND SAFETY TRAINING

Fortifying businesses to strengthen the Texas economy

Texas Mutual is seeking to invest in workforce development and safety training initiatives in its effort to build a stronger, safer Texas. For the 2024 grant cycle, we're looking for organizations focused on:

- Training the current and future skilled workforce in safe work practices, especially in industries or occupations at higher risk for workplace accidents
- Creating strong pathways for in-demand middle-skill jobs
- Upskilling and reskilling adult learners using earn-and-learn initiatives

Applications will be accepted between 8 a.m. CDT on **Monday, August 19** and 11:59 p.m. CDT on **Friday, September 27**.

Join our informational webinar on August 28 to hear from the community affairs team. [Register here](#).

REQUEST FOR PROPOSALS FAQs

Q1: How do I apply for a grant from Texas Mutual Insurance Company's charitable efforts?

A: Organizations interested in applying should use the [online application portal](#) during the appropriate submission window. Select the grant cycle you're interested in, click the green 'Apply' button and either log in to your existing account or register as a new user to begin the process.

Q2: Are there any eligibility requirements for this grant?

A: We will be funding projects or organizations that are based in Texas. Please note that once you start the application, you will be asked if you were invited to apply. You do not need to be invited to apply for either grant cycle.

Q3: Is there a specific time period when Texas Mutual accepts applications for funding?

A: In 2024, Texas Mutual will issue two RFPs for the following focus areas:

1. Generational Learning (health and wellness, access to child care and holistic wraparound services) *Applications accepted: April 15 to May 24, 2024*
2. Workforce Development & Safety Training (upskilling/reskilling efforts, middle-skill pathways and safety training) *Applications accepted: August 19 to September 27, 2024*

Q4: What is the grant-making timeline for this funding opportunity?

Generational Learning	
Date	Activity
April 15	1 st RFP opens
April 24	Informational webinar
May 24	Proposals due
May 27 - June 21	Proposals evaluated
Week of June 24	Final award decisions

Workforce Development	
Date	Activity
August 19	2 nd RFP opens
August 28	Informational webinar
September 27	Proposals due
September 30 - October 25	Proposals evaluated
Week of October 28	Final award decisions

Q5: How do I know what amount to apply for?

A: Grant amounts vary by market and organization size. If you have previously received a Texas Mutual grant, an amount in that same range is a good starting point. Applicants should request funding between **\$25,000-\$100,000**, unless otherwise advised. We also recommend that the grant amount you request does not exceed 10% of your organization’s total current operating budget.

Q6: Who do I contact for questions about the program, application, etc.?

A: The community affairs team will be hosting an informational webinar on April 24 and August 28 to review the application process and answer your questions. You can also contact the community affairs team by submitting questions to communityaffairs@texasmutual.com. We encourage you to email questions in advance of the webinar. Registration for the event is required and you can access the registration link and additional resources at our “About Texas Mutual: Community Funding” [webpage here](#).

Q7: I am having technical issues with the SurveyMonkey Apply platform, where can I find support?

A: We recommend you explore SurveyMonkey’s resources:

- [General Account FAQ](#)
- [Completing an Application FAQ](#)
- [Managing your Organization FAQ](#)
- [Contact the SurveyMonkey Apply Support Team](#)

Q8: My organization delivers services that span more than one of your focus areas. Can I apply for more than one RFP? If not, how do I determine which RFP to apply for?

A: Although, you may apply for more than one RFP, we will only fund an organization once in a calendar year. As you decide which RFP you will apply for, consider which program or service is your highest priority. We suggest selecting the RFP that most closely aligns with your organizational mission.

Q9: Can we apply through the RFP process for a multi-year grant?

A: As a general guideline, Texas Mutual does not make multi-year grants through the RFP grant cycle.

Q10: Do applicants need to be working within a specific geography to be eligible?

A: To be eligible to apply, organizations must be able to demonstrate that they are actively delivering technical assistance and services to Texas communities. We will not consider programs or projects happening outside of the state.

Q11: Can I apply for 2024 funding if I received a 2023 Generational Learning or Workforce Development & Safety Training award?

A: If you received a 2023 Generational Learning or Workforce Development & Safety Training grant and wish to reapply during your current grant cycle, you will need to answer an additional question that articulates the need for additional funding. The question will populate in the application portal.

Q12: What types of organizations will not be considered?

A: We will not fund organizations that meet one or more of the items below:

- Organizations not incorporated as a 501(c)(3)
- Organizations that discriminate on the basis of race, sex, gender identity or expression, color, religion, national origin, age, disability, sexual orientation, veteran's status or other legally protected personal characteristics or status
- Religious or fraternal organizations (unless they are engaged in projects that benefit the entire community)
- Private foundations

Q13: What type of documentation is required as part of my application?

A: Texas Mutual will ask for a proposed project budget, your current organization's total operating budget, the organization's Form-990, a list of board members with affiliations and a list of top organizational and/or project funders. We also invite you to submit supplementary materials such as videos, articles and newsletters that demonstrate the impact of the proposed project as well as your organization.

Q14: Do I need to be a Texas Mutual policyholder?

A: No, these grant applications are open to all eligible nonprofit organizations. However, we are proud to share that on average roughly 50% of grant recipients are policyholder organizations.

Q15: Will Texas Mutual fund overhead expenses?

A: We recognize that nonprofits often rely heavily on people to carry out their programs. Therefore, we are open to funding some overhead costs. We are comfortable funding up to 30% of indirect costs specified in the project budget.

Q16: What should I consider when requesting funding for a project?

A: Since the Texas Mutual RFP funding is a one year grant, we are looking to invest in projects that are sustainable beyond our own investment. Please do not request funding for long-term projects that are dependent solely upon the Texas Mutual grant.

Q17: What does the review process look like?

A: Each grant will be reviewed by multiple Texas Mutual employee reviewers who live and work across the state. The RFP process is very competitive each year, and unfortunately, we are unable to fund all of the amazing work that is being proposed. Our reviewers are trained to evaluate projects based on alignment to Texas Mutual’s mission, community collaboration, potential to lift up disadvantaged groups, and the ability to create lasting impact through data-driven decision making. We encourage you to apply, even if you have not been funded before!

Q18: Does Texas Mutual have a preference for new or ongoing projects?

A: Due to the set contract and reporting dates, we strongly suggest against applying for new projects. Projects where work is underway will be better suited for the Texas Mutual RFP.

Q19: What will be required of me if I am awarded a Texas Mutual grant?

A: We will require a brief mid-year report and a comprehensive final report on the project that has been awarded funding. Instructions and details about reporting requirements will be sent to grant partners ahead of the report deadlines.

Anticipated contract dates for 2024 Generational Learning grants are July 2024 - July 2025. A 6-month grant report will be due in March 2025 and a final report will be required in September 2025. Anticipated contract dates for Workforce Development & Safety Training grants are December 2024 – December 2025. A 6-month grant report will be due in June 2025, and a final report will be required by the end of December 2025.

Please note that Texas Mutual grants may not be used for expenses incurred prior to the contract period. All funds must be exhausted by the end of the contract date, unless otherwise noted.

