

2025 COMMUNITY FUNDING GUIDE

TEXAS MUTUAL INSURANCE COMPANY



ABOUT OUR 2025 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 employees 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 \$90 million into our communities since 2016 and continue to commit our resources to ensure meaningful change for current and future Texans.

In 2025, Texas Mutual is committing \$8 million through two Request for Proposal (RFP) initiatives. The first RFP for **Generational Learning** opens on April 14 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 11 and will invest in safety training, pathways to middle skill jobs and earn & learn programs.

We believe the best thing about our state 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 employees 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 14** and 11:59 p.m. CDT on **Friday, May 16**.

Join our informational webinar on April 23 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 2025 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 11** and 11:59 p.m. CDT on **Friday, September 12**.

Join our informational webinar on August 20 to hear from the community affairs team. [Register here](#).

REQUEST FOR PROPOSALS FAQs

Q1: How do I apply for an RFP grant from Texas Mutual?

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 **Apply** 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 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 2025, 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 14 to May 16, 2025
 - 2. **Workforce Development & Safety Training** (earn and learn initiatives, middle-skill pathways and safety training) applications accepted: August 11 to September 12, 2025

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

Generational Learning	
Date	Activity
April 14	1 st RFP opens
April 23	Informational webinar
May 16	Proposals due
June 2-27	Proposals evaluated
Week of June 30	Final award decisions

Workforce Development	
Date	Activity
August 11	2 nd RFP opens
August 20	Informational webinar
September 12	Proposals due
September 15-October 24	Proposals evaluated
Week of October 27	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 informational webinars on April 23 and August 20 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 on our [Community Funding page](#). A recording of each webinar will be posted on this page after the webinar.

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](#)

If personnel changes impact your organization's access to the application portal, follow the instructions below to manage collaborators and ownership of your application:

- Adding a collaborator:
 - Log in and open the grant application.
 - Select **Add Collaborator** on the left side of the application.
 - Enter the new collaborator's email address.
 - Set permissions to either **View Only** or **View & Edit**.
 - The new collaborator will receive an email invitation, which they must accept for access.
 - **Note:** Collaborators can edit and complete application tasks, but only the owner can submit the final application.
- Transferring application ownership to a collaborator:
 - Log in and open the application.
 - Follow the instructions above to add the new owner as a collaborator, if they are not already.
 - Find the collaborator's name and select the ellipses (...) next to it.
 - Select **Make Owner** from the dropdown menu.
 - **Note:** This transfer of ownership is crucial if the original owner is leaving the organization, as it ensures continued access and ability to submit the application.

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 project 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 outside of the state.

Q11: Can I apply for 2025 funding if I received a 2024 Generational Learning or Workforce Development & Safety Training award?

A: If you received a 2024 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 in the application that articulates the need for additional funding.

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, color, religion, national origin, age, disability, 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: Can I apply for a grant if my organization is not a nonprofit, but is an employer with an upskilling program that strengthens the workforce?

A: Grants are awarded exclusively to nonprofit organizations. However, we recognize the critical role private companies play in hiring and upskilling employees to strengthen our workforce. We encourage collaborations between corporations and nonprofits. Applications for joint projects between companies and nonprofit organizations to meet workforce needs are welcome, with the grant being awarded to the nonprofit fiscal partner.

Q14: What type of documentation is required as part of my application?

A: Texas Mutual will ask for a proposed project budget, your organization's total operating budget, the organization's Form 990, a list of board members with affiliations and a list of top project funding sources. 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.

Please note that a Form 990 will be required for most organizations exempt under Internal Revenue Code section 501(c)(3). If your organization is not required to file Form 990, you will not need to submit this form with your application. Organizations not required to file Form 990 include:

- Churches, integrated auxiliaries of churches, and conventions or associations of churches
- Organizations (other than private foundations) with gross receipts in each taxable year of normally not more than \$5,000

Q15: 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, 50% of grant recipients are policyholder organizations. If you are interested in becoming a Texas Mutual policyholder, please reach out to your insurance agent.

Q16: Will Texas Mutual fund overhead expenses?

A: We are open to funding administrative expenses as part of the project budget. However, we prefer allocating grant funding to costs directly tied to project delivery.

When preparing your application, please:

- Be transparent about all costs.
- Link administrative costs to project outcomes and success.
- Explain how you're keeping administrative costs reasonable.
- Describe your plan for continuing the project after our one-year grant period.
- Explain any unusually high administrative costs.
- Share information about other committed funding sources for the project.

Our 2025 grant application will provide guidance on categorizing cost information, including a template for clear budget presentation. We aim to support impactful projects while ensuring responsible use of grant funds. Thank you for your careful consideration of these factors in your application.

Q17: What should I consider when requesting funding for a project?

A: Texas Mutual RFP funding is provided as a one-year grant. We prioritize projects that demonstrate sustainability beyond our investment. Please consider the following:

- Do not request funding for long-term projects that rely solely on the Texas Mutual grant.
- If a significant portion of the grant funds are allocated toward staff salaries, address the following in your budget narrative:
 - How these positions will be sustainably funded beyond this one-year grant period.
 - Your plan for continuing the project after Texas Mutual funding ends.

Q18: 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. Reviewers are trained to evaluate projects based on:

- Alignment with Texas Mutual's mission
- Community collaboration
- Potential to uplift those facing barriers
- Ability to create lasting impact through data-driven decision making

The RFP process is highly competitive, and unfortunately, we cannot fund all proposed projects, despite the incredible work presented. We encourage all eligible organizations to apply, even if you haven't received funding from us before. Each year brings new opportunities!

Q19: Does Texas Mutual have a preference for a specific type of project?

A: Texas Mutual prioritizes investments in specific projects or services rather than general organizational operating budgets. Due to our set contract and reporting dates, we strongly recommend applying for ongoing projects rather than new initiatives. Projects that are already underway are better suited for our RFP, as they can:

- Demonstrate early results or impact
- Show established processes and partnerships
- Better align with our reporting timeline

While we appreciate innovative ideas, the limited grant period makes it challenging to launch and report on entirely new projects effectively. We encourage applicants to consider how our funding can enhance, expand or strengthen existing successful programs that align with our mission and goals.

Q20: What will be required of me if I am awarded a grant?

A: Grant recipients are required to submit a brief mid-year report and a comprehensive final report. Detailed instructions and reporting requirements will be provided to grant partners well in advance of deadlines. You can view grant timelines below.

2025 Generational Learning Grants:

- Contract period: August 2025-August 2026
- Mid-year report due: March 2026
- Final report due: September 2026

2025 Workforce Development & Safety Training Grants:

- Contract period: December 2025-December 2026
- Mid-year report due: June 2026
- Final report due: January 2027

Texas Mutual RFP grants may not be used for expenses incurred prior to the contract period and all funds must be exhausted by the end of the contract date, unless otherwise specified. Our Community Affairs team will provide ample notice and support to ensure timely submission of reports.

