Welcome

Please take a few minutes to get to know the online tool we’ll be using today.

- Participants will be muted during the presentation, but can ask questions via the chat functionality; we will do our best to answer questions after each section.

- Don’t worry if you miss a portion - the Webinar will be recorded and shared with participants.

- If we can’t get to all of your questions, we will capture them and update supporting materials and FAQs as needed.

- If you require assistance during the webinar, please send a message via chat to BMGF AV.

- Yes, grab your tea! The session will begin at 5 minutes after the hour.
Questions & Answers

Attendees submit questions by clicking the Q&A icon. Attendees can choose to post anonymously.

Attendees will see a blue alert bubble in the Q&A icon to note an answer has been received. Other Attendees can “Like” the question to highlight priority.

Note: Promoted Attendees will not be able to answer.

Attendees (only) can submit questions for the Moderator and/or Presenters to answer.
POSTSECONDARY SUCCESS: RFP INFORMATIONAL WEBINAR
INTRODUCTIONS

Chrystie Hill
Deputy Director
Postsecondary Success

Francesca Mazzola
Program Officer
Postsecondary Success
# AGENDA

<table>
<thead>
<tr>
<th>Agenda Item</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Objectives</td>
<td>10 min</td>
</tr>
<tr>
<td>Introduction to the Bill &amp; Melinda Gates Foundation</td>
<td>15 min</td>
</tr>
<tr>
<td>Introduction to the Postsecondary Success Strategy</td>
<td>25 min</td>
</tr>
<tr>
<td>Postsecondary Success RFP: Intermediaries for Scale</td>
<td>30 min</td>
</tr>
<tr>
<td>Q&amp;A</td>
<td>30 min</td>
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</tbody>
</table>
WELCOME AND OBJECTIVES
WHAT BRINGS US HERE...

- We work closely with partners to understand transformation in colleges and universities, especially those working to dramatically improve outcomes for low-income and first-generation students, and students of color.

- With those partners, and the colleges we work most closely with, we are learning about what transformation means, that it can happen, and how it happens.

- We see the opportunity now to work with our partners to reach even more students by supporting more institutions as they go through their transformation process.

- This optional webinar is one in a series of learning opportunities for all interested applicants.

- Our purpose is to provide general information and answer questions about this opportunity and the selection process.

- Participation in this webinar is not required to submit a Letter of Interest at the first stage of the RFP.
WEBINAR OBJECTIVES

The purpose of this webinar is to provide helpful information to guide applicants through our Request for Proposal. We hope to achieve four main objectives:

Introduce the foundation and how we work with our grantees

Provide an overview of the Postsecondary Success strategy

Share information about the RFP process

Answer outstanding questions

If you require assistance during the webinar, please send a message via chat to BMGF AV
INTRODUCTION TO
THE BILL & MELINDA
GATES FOUNDATION
ALL LIVES HAVE EQUAL VALUE
THE FOUNDATION IS DEDICATED TO TACKLING INEQUITY ACROSS OUR 32 PROGRAM STRATEGIES

<table>
<thead>
<tr>
<th>Program Strategies</th>
<th>$4.7B</th>
<th>Countries</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td></td>
<td>137</td>
<td>1,541</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Direct Grantee Support</th>
<th>No. of Grants</th>
<th>U.S. States</th>
<th>Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>$4.7B</td>
<td>1,469</td>
<td>49</td>
<td>1,425</td>
</tr>
</tbody>
</table>

Grantees 1,089

For the Year ended December 31, 2017. Amounts in thousands of U.S. dollars. Value of Grants total represents grants only.

If you require assistance during the webinar, please send a message via chat to BMGF AV
EACH PROGRAM’S STRATEGY IS INFORMED BY, AND DEPENDS ON, THE WORK OF OUR PARTNERS
WE MAKE INVESTMENTS WITH PARTNERS THROUGH FOUR STAGES

The RFP process will take us through the first stage—Concept Development

Concept Development
- Generate and validate ideas and concepts that support team strategy
- Work with partners to determine desired outcomes and grantee capabilities

Pre-Proposal
- Develop proposal and budget with grantees
- Review proposal and budget with internal and external experts, including foundation leadership

Development
- Submit proposal analysis and recommendations
- Determine funding decision
- Develop grant agreements

Learning & Evaluation
- Hold regular check-ins with partners
- Review periodic reports from partners
- Conduct site visits to learn from our partners
- Evaluate and measure progress towards goals
- Synthesize key learning
INTRODUCTION TO THE POSTSECONDARY SUCCESS STRATEGY
We believe that every person deserves the chance to lead a healthy, productive life.

In the U.S., this means expanding life-changing opportunities, including—and especially—education.
THE VALUE OF COLLEGE

Opportunity in America is not attainable without postsecondary education

Studies validate what many of us know and believe – that education offers a path to economic opportunity and a buffer from economic downturns.

However, we also know that this path and opportunity are not equitably accessible to all.

We can now predict and expect gaps in student outcomes based upon race and income -- this is unacceptable to us and a key focus of our strategy.

Lifetime Income Distribution of 100 Children Born into Poverty (Bottom Income Quintile)

<table>
<thead>
<tr>
<th>Top Quintile: Richest 20%</th>
<th>Did Not Attend College (100)</th>
<th>Attended College (100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4</td>
<td>19</td>
</tr>
<tr>
<td>4</td>
<td>9</td>
<td>22</td>
</tr>
<tr>
<td>3</td>
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<td>2</td>
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<td>21</td>
</tr>
<tr>
<td>1</td>
<td>42</td>
<td>15</td>
</tr>
</tbody>
</table>

If you require assistance during the webinar, please send a message via chat to BMGF AV.
We work with partners to expand opportunity by:

- Increasing the number of students achieving certificates and degrees.
- Closing gaps in student success by race and income.
OUR STRATEGY: INCREASING EQUITABLE STUDENT SUCCESS

WHERE WE ARE

Student Success Rates

Gaps in Success by Race & Income

Less Mobility & Competitiveness

WHERE WE INVEST

Innovation

Digital Learning
Technology-Enabled Advising
Redesigned Remedial Courses

Policy Advocacy

Data and Information
Finance/Financial Aid

Transformation

Institutional Partnerships and Networks

WHERE WE WANT TO BE

Student Success Rates

Gaps in Success by Race & Income

Less Mobility & Competitiveness

More Mobility & Competitiveness
INSTITUTIONAL TRANSFORMATION AT SCALE

Our theory of change illustrates how we can work with partners to help hundreds more colleges provide millions more students with high-value degrees or credentials while closing gaps in student success by both race and income.

Impact

Hundreds more colleges help millions more students obtain high value degrees or credentials while closing gaps in student success by both race and income.
INTERMEDIARIES FOR SCALE – AN EXAMPLE

Jobs for the Future has been piloting this concept in partnership with Student Success Centers in fifteen states since 2017

Impact
The ~500 colleges served by Student Success Centers enroll 62% of US community college students; 70% of students of color and 59% of Pell Grant recipients at U.S. community colleges
OUR RFP IS FOCUSED ON SELECTING NEW INTERMEDIARIES FOR SCALE

Our theory of change illustrates how we can work with partners to help hundreds more colleges provide millions more students with high-value degrees or credentials while closing gaps in student success by both race and income.

**Innovation Networks**
Expert communities of practice made up of... that design, test and deliver solutions related to key student loss and momentum points.

**Transformation Supports**
Specific innovations will be:
- Situated within transformational frameworks and tools
- Tested with institutions, and then curated for ease of access and use

**Intermediaries for Scale**

**Transformation Networks**
Institutions will be able to seek out guidance and support from experienced peers and partners who can help them:
- Articulate their vision for the future
- Accelerate their speed of transformation

**Enablers**
- Connectivity: Increased connectivity between participants will activate and align partners for faster, better results
- Data, Measurement, and Learning: Metrics, evaluation and evidence will drive institutional transformation efforts
- Political Context: State advocacy strategies will raise the visibility of our priority issues to support and incent institutional transformation
- Economic Pressure: Public support for funding linked to student success will drive more value for students

**Results**
Hundreds more colleges provide millions more students with higher value, mobility generating, postsecondary opportunities
POSTSECONDARY SUCCESS RFP: INTERMEDIARIES FOR SCALE
WE ARE LOOKING FOR ORGANIZATIONS THAT HAVE...

| 1 | A mission focused on increasing student success in education after high school |
| 2 | A track record of working across multiple colleges and universities serving a significant number of low-income students and students of color |
| 3 | A demonstrated commitment and experience in:  
  • Reducing college success disparities by race and income  
  • Promoting continuous learning and improvement through the use of data  
  • Identifying, implementing, and evaluating significant campus-level changes in policy and practice |

Please Note: Applying organizations must be U.S.-based entities
**AS AN INTERMEDIARY FOR SCALE, YOUR ACTIVITIES WILL INFORM OUR STRATEGY AND INCREASE OUR IMPACT**

<table>
<thead>
<tr>
<th>Example activities</th>
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<tbody>
<tr>
<td>Increase awareness of successful and promising transformation strategies among campus leaders and communities.</td>
</tr>
<tr>
<td>Inform and influence campus-decisions about change strategies and options and support decision-makers in implementing change strategies.</td>
</tr>
<tr>
<td>Support institutional transformation by providing guidance and resources for adopting, implementing, evaluating, and sustaining changes in policy and practice.</td>
</tr>
<tr>
<td>Build connections across colleges, universities, and supporting organizations to accelerate and streamline learning and sharing of promising practices.</td>
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</tbody>
</table>
In the Letter of Interest application, we ask that applicants agree to learning more about the following:

1. Ensure all participating institutions are submitting specific key performance indicators (data disaggregated by race and income via the National Student Clearinghouse’s Postsecondary Data Partnership (PDP)).
2. Ensure all institutions are participating in the Institutional Transformation Assessment (ITA).
3. Use data to support the institutional transformation process from prepare, reflect, prioritize, act, and monitor.
4. Coordinate and interact with qualified technical assistance and other service providers.
5. Engage institutions to opt-in to sharing data about service needs and outcomes with relevant service providers.
6. Actively participate in formative evaluation and learning, led by AIR, and incorporate findings into planning and implementation as appropriate.
7. Actively participate in a learning community with other intermediaries and the Gates Foundation.
<table>
<thead>
<tr>
<th></th>
<th><strong>MAJOR STAGES AND DEADLINES</strong></th>
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</table>
| 1 | **Letter of Interest**  
*Deadline: March 20, 2019*  
Organizations/networks meeting the eligibility criteria are asked to submit a brief statement outlining their mission, capabilities, and experience in working with diverse types of colleges and universities  
Information about letters of interest and instructions for submitting materials are available on our website |
| 2 | **Request for Information**  
*Deadline: May 10, 2019*  
A subset of organizations/networks submitting letters of interest will be asked to provide additional information about their operations, approach to innovation, and experience and impact in collaborative efforts |
| 3 | **Request for Concept**  
*Deadline: June 28, 2019*  
A subset of organizations/networks responding to the request for information will be asked to prepare and submit a concept paper outlining their proposed approach to supporting colleges and universities in their transformation efforts and sharing learning across networks |
| 4 | **Request for Proposal**  
*Deadline: Aug/Sep 2019*  
A final subset of organizations/networks (up to 10) will work with the foundation to develop formal proposals for funding, including: a) a multi-year scope of work; b) progress milestones and metrics; and c) a detailed budget and workplan |
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 13</td>
<td>Informational Webinar No. 1</td>
<td>Optional</td>
</tr>
<tr>
<td>Mar 5-7</td>
<td>Learning Event No. 1</td>
<td>Optional</td>
</tr>
<tr>
<td>Mar 12</td>
<td>Informational Webinar No. 2</td>
<td>Optional</td>
</tr>
<tr>
<td>Mar 20</td>
<td>Letter of Interest Deadline</td>
<td>Major Deadline</td>
</tr>
<tr>
<td>May 1-2</td>
<td>Learning Event No. 2</td>
<td>Invite-Only Learning Event</td>
</tr>
<tr>
<td>May 10</td>
<td>Request for Information Deadline</td>
<td>Major Deadline</td>
</tr>
<tr>
<td>Jun 6-7</td>
<td>Learning Event No. 3</td>
<td>Invite Only Learning Event</td>
</tr>
<tr>
<td>Jun 28</td>
<td>Request for Concept Deadline</td>
<td>Major Deadline</td>
</tr>
<tr>
<td>TBD (Aug or Sep)</td>
<td>Request for Proposal Deadline</td>
<td>Final RFP Deadline</td>
</tr>
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</table>

The two informational webinars and first Learning Event are completely optional. Participation is not a prerequisite to submit a Letter of Interest.

Learning Events 2 and 3 are required for applicants who advance to Stages 2 and 3, respectively.
**OVERVIEW OF ANTICIPATED INVESTMENTS**

While we are not yet sure about what specific individual investments will look like, this is what we expect for the full portfolio:

At the end of this RFP process, we expect to:

- Invest in a **portfolio of grantees**; the portfolio will be comprised of **7-10 organizations** (or coalition of organizations) for a total investment of **up to $20M** over an **18 month period**

- Meet organizations where they are in their **development towards scale**; for most organizations initial investments will support:
  - **Development of capacities** needed to execute new or emerging institutional transformation strategy
  - The creation of an **initial business plan** for executing the roles and responsibilities of an intermediary for scale
  - Initial preparation for **validating and launching** the business model

*At the end of these first grants, the foundation will evaluate intermediaries’ progress and accomplishments and determine readiness for further activity and engagement with campuses.*
Questions?

Please Email
IntermediariesForScaleRFP@gatesfoundation.org
with any additional questions