

OVERVIEW: The following document includes all the questions we received during Learning Event #1 in Austin, TX March 5-7 broken down by session. To ensure that all applicants have access to the same information, we are publishing the questions and our answers here. We did our best to keep the questions verbatim but did adjust the question if we thought it would help clarify its meaning. If you have further questions or if you believe your question was not answered. Please reach out to IntermediariesForScaleRFP@gatesfoundation.org

POSTSECONDARY SUCCESS STRATEGY OVERVIEW:

Who are your target students?

Students from low-income families and students of color.

What is the minimum scale that you are looking for in regards to the number of colleges served?

We do not have a minimum threshold for the number of schools or students served by each intermediary for scale. As we think about scale, we are interested not only in reach of students and institutions, but also in depth of services provided. We are seeking partners who will work across colleges and universities, whether nationally or within a specific state or region. We expect approximately 300-500 institutions will be served by the full cohort of intermediaries in the "proof of scale" portfolio.

Can you define student success?

We support and work with partners to transform colleges and universities so that more students – especially low-income and students of color – graduate at higher rates, with high-quality degrees or certificates, at an affordable cost.

How do you define postsecondary education?

We focus on undergraduate degrees and credentials. While we recognize that there are many approaches that can support postsecondary student success, we do not have the resources to invest in all of them. We continuously prioritize our resources and focus on the interventions that we believe we can best influence.

What are some of the learning objectives for this meeting?

These learning events are aimed to help applicants better understand the role an intermediary for scale will play in the foundation's Postsecondary Success strategy and facilitate opportunities for networking and partnership.

Can you say more about this commission on the value of higher education?

This spring, we will be launching a commission of field experts from higher education administration, research, and policy to develop a consensus-driven definition of college value with a focus on affordable and equitable outcomes for low-income students and students of color.

What are tactics you know to work toward student success? Is there noted research to reference?

There are many; we focus on the evidence for technology-enabled advising, remedial education reform, and digital learning. We are also interested in the capacities that institutions need to implement these tactics, and the frameworks or tools that support institutions in implementing them.

Where do private colleges fall into your strategy?

We serve institutions of many types, including private colleges. We are currently focused on institutions that serve minimum 25% URM and/or 30% Pell Recipients, and that meet fundamental success and sustainability criteria, which we will share in more detail in the next round.

Can you talk about how you envision a network of organizations serving as the intermediary might look like as opposed to a single organization?

We can imagine a single organization applying alone or with partnerships identified, a group of organizations putting forward an application together with a lead applicant identified, or a coalition of

organizations putting forward an application with no lead applicant identified. There may be many other configurations and partnerships are not required in the first stage of the application.

I thought guided pathways was one of your core innovations? Where does it fit in your strategy?

We see pathways as a transformational framework that incorporates multiple solutions and capacities. The foundation provides support for development of the pathways framework, partnerships like the Pathways Collaborative, and research on the effectiveness pathways implementations.

How do you view the place of community colleges in this strategy?

We serve institutions of many types, including community colleges. We are currently focused on institutions that serve minimum 25% URM and/or 30% Pell Recipients, and that meet fundamental success and sustainability criteria, which we will share in more detail in the next round.

Is there a way for the BMGF to spark transformation of how completion is measured, to truly capture the full scope of completion?

Equitable completion will always be the foundation of our strategy; however, we are also exploring how colleges can help students achieve credentials of value with respect to affordability and economic mobility. We have invested in partners such as IHEP and the Postsecondary Data Collaborative, which continue to provide thought leadership and advocacy on this topic.

Outside of the moral imperative to increase equity, what are the plans/impressions for programming considering the changing demographics of higher ed on the horizon?

Our work is grounded in the reality of the changing demography of higher education. This changes not only the population that higher ed needs to serve but also the economics of the entire industry as demographic shifts differ significantly by region and institution type.

Can you please clarify breadth vs depth?

We are interested in both the breadth or reach of students and institutions nationally, but also in depth of transformation and services provided at individual institutions, potentially impacting all students served in those institutions.

What specifically do you want the intermediaries to do? Do they implement their own ideas or ideas that you already have?

Characteristics of intermediaries for scale include the following: 1) Collaboration with partners, 2) Strategy to support institutional transformation, and 3) Operations to support successful implementation of a strategy. There are four broad categories of activities that intermediaries may lead: 1) building awareness, 2) influence decision makers, 3) drive the implementation of transformational change, and 4) build connections.

Will you be proscribing the specific innovations to be implemented?

No; we do expect intermediaries for scale to work with the solutions networks to provide support to their institutions. These networks represent a wide variety of innovation strategies, but also need not be the only areas of support provided.

Are there regional foci you envision for the portfolio?

We expect the portfolio to disproportionately serve institutions in our focus states (which were selected both because of their student populations, which include high numbers of the students we target, and because of partnerships with our K-12 and policy funding in that state).

To the extent that student persistence is required for completion, is evidence of impact on student persistence of interest in this RFP?

Yes; via the PDP data collection, intermediaries will be expected to track and attend to early-momentum indicators identified in the field-sourced IHEP postsecondary metrics framework (including credit accumulation, gateway course completion, and retention), disaggregated by equity subgroups.

What are your target states?

Our focus states include: California, Florida, Georgia, New York, North Carolina, Tennessee, Texas, Ohio, Washington. We have also have focus cities which include: Chicago and Washington DC. Funding will not be limited to these states and cities.

What is the value prop for IHEs to participate in this transformation?

Enhancement of their mission as well as their economics (as student retention, persistence and success also impact institutional bottom lines).

What about working adults as a priority target?

We recognize that there are many groups of students who would benefit from institutional support to complete postsecondary degrees/credentials. Our strategy currently focuses on low-income students and students of color; however, to the extent that working adults, part-time students, and transfer students are overrepresented among these populations, we will be seeking intermediaries that can serve their needs.

Is there a role for state or system policy here to create enabling conditions for scaling success?

Yes; attention to national and state policy advocacy and implementation is an important part of the intermediary for scale role; it should not be prioritized above deep implementation services and supports, however.

How do you expect the different organizations represented here to partner and work together?

There is not an expectation for organizations to form partnerships at this stage. We are facilitating the process of organizations to network, connect, and partner (if needed). Ultimately, the organization will determine if a partner is needed.

How are you communicating to your current grantees that the foundation hears and is acting on lessons learned at the close of grant investments?

We honestly don't do a great job with this and we are trying to do better. We publish reports and hold convenings where we share information; most knowledge transfer takes place between the program officer and the partner. This is impacted by program officer changes over time.

What is your perspective on how the market of institutions will shift (e.g., will it shrink given competition from boot camps and other short form training programs linked to labor needs)?

Boot camps and other alternative training programs are currently relatively small. Changing demography will have a greater impact in the near term (~5 years). Without intervention from state and Federal funding, we would expect the continued trend of institutional closures, consolidation and mergers. We are currently exploring how these trends will impact students (particularly our focus populations of low-income students and students of color).

Do you have plans for further supporting the successful intermediaries you work with, past this RFP lifecycle?

Yes; initial investments will support the first stage of work for each intermediary in the portfolio. We expect the first round of investments to be for 18mo. Further investments will be considered (and we currently expect to make them) on the successful completion of grant deliverables in Stage 1.

Is the foundation open to collaborating with other foundations to jointly fund efforts?

We have been involved with other co-funding efforts particularly to support common areas of interest in some of our focus states (e.g., Belk in North Carolina, College Futures in California). We welcome co-funding opportunities as part of our intermediaries for scale RFP as well.

Should the intermediary activities be for new action funded under the grant or can it scale previously piloted work?

It can/should scale previously piloted work.

Are you interested in an intermediary that can work with institutions around nonacademic challenges that our students face?

Yes, we hope that intermediaries can provide services to institutions that will include both academic and nonacademic support.

Are there minimum standards of institutional health (enrollment trends, financial stability, etc) you require when selecting institutional partners?

Yes; these will be shared in stage 2 of the RFP process, where we will also ask potential intermediaries to share information about the colleges that they currently work with to ensure the full portfolio sufficiently reaches and impacts low-income students and students of color in postsecondary education.

The comment re: Pathways orgs struggling to name what they are good at leads me to wonder about the need to invest in the health of the orgs themselves - does the Foundation have a view on this?

Yes; capacity building is a primary purpose of the intermediaries for scale portfolio. We believe that intermediaries can build their capacity for work at greater scale, and that intermediaries could then be strong assets in the field following our catalytic investments / partnerships.

Will BMGF keep paying the intermediaries to do this work? If not, who will pay for it?

We recognize that this work is challenging and will take multiple years to complete, including planning and capability building. At the same time, our funding is limited, and is intended to lead to partnerships and practices that are sustainable beyond foundation funding.

Do you want intermediaries to implement ideas that BMGF already supports? Or do you want them to proposed new ideas?

While we prioritize and directly invest in digital learning, advising, and developmental education, there is room to consider new, evidence-based solutions and capacities.

What are the outcomes of the Jobs for the Future (JFF) work?

There are several outcomes from this work, including 1) Student outcomes in colleges served 2) practices changes in colleges served 3) growth of the network 4) development of BMGF scaling strategy and 5) strengthening pathways friendly policies in network states.

How do you get colleges to change their business model in this age of disruption?

Our work with Completion by Design and the Frontier Set indicates that when colleges truly put equitable student success in the center of their decisions, they begin functioning differently, making different choices and, as a result, end up with significant modifications to their business models (evidenced in their student outcomes and even financial indicators).

Are there certain initiatives being addressed by existing intermediaries for scale that you would recommend us to NOT focus on?

No, there are not.

Can an intermediary focus on a specific subpopulation of low-income students of color?

Yes, organizations can focus on sub-populations of low-income students and/or students of color.

What's the definition of evidence- since we invest too little in racial equity there is unlikely to be defining evidence for the kind of strategies needed. Does it create a vicious cycle?

We regularly collect and review the latest evidence on our solutions, including examining whether the evidence is disaggregated and shows positive impact for low-income students and students of color, which we have shared with the Solution Networks, who are also tracking the literature. It is the case that too many studies do not disaggregate their findings, so we will be working together with the Solution Networks to determine how to fill critical evidence gaps.

Can these Intermediaries also broker connections between K-12 and higher education - even though the investment is from the postsecondary strategy?

If the focus remains on changing institution practice for student outcomes, connections to K-12 and higher education are welcome.

How do you define transformation? How is it measured?

We define transformation as colleges and universities building their capacity to dramatically improve student outcomes and eliminate success gaps by race and income. This includes having a student-centered mission, using data to make decisions, creating a collaborative environment, setting goals and being accountable for them, and making a commitment to continuous improvement. We measure this primarily through a focus on institutional change and its impact on student outcomes.

How can we gauge institutional readiness for transformation? What is your tool?

We do not yet have a tool to determine readiness; we would like to have one! We expect that this could be developed through our current work with institutions in the next 18 months, and may include work with intermediaries for scale, once they are identified.

How would universities be imagined as intermediaries for scale?

Universities could be intermediaries for scale if they serve a large proportion of target students and participate in a network of peer institutions that they expect to influence and support transformations within.

REQUEST FOR PROPOSAL OVERVIEW:

Can intermediaries be both a conveyer/connector/networker AND provide direct service to that network within their own area of expertise - or do those two roles have to be entirely distinct?

Yes, intermediaries for scale can play multiple roles. For example, we can envision an organization that provides both direct services and acts as a networker.

In what ways is the foundation involving universities to understand their desires for transformation/transformation support? (with the understanding that you can't "do" transformation to someone else).

We absolutely agree that transformation cannot and should not be "done" to institutions. Rather we hope that intermediaries for scale will work within their networks to identify institutions that are ready, willing, and able to undergo the transformational process.

When Gates refers to "students" (Part C-past work, Part D #1-students reached) are you referring specifically to college/post-secondary students? *Our work also includes equity work with high school.

Our work specifically focuses on post high school students. Funding from this opportunity will be focused on supporting student success in postsecondary education.

From the Frontier set, is there a "readiness survey" to assess readiness to transform?

Unfortunately, not yet. We hope to work with our partners to better understand how to assess institutional readiness through this work, including considering how to leverage existing tools and resources.

As the stages of the RFP process unfold, will you publicly announce the organizations that move forward - in order to allow other organizations to seek them out for potential partnerships?

Yes. At this time, we expect to publicly disclose organizations that move forward to each stage so that partnerships can continue to form and evolve.

Beyond JFF, do you have another example of an intermediary for scale (even from a different field)?

One close example is AACC and their role in the Pathways Institutes, which supported 30 colleges in guided pathways implementations, with nine organization partners (that are all a part of the Pathways Collaborative), and then scaled out to provide a similar service to additional colleges.

Has Gates received commitments from specific institutions who are willing to engage in this transformation process?

No, we are not entering this work with specific commitments from institutions. We expect Intermediaries for Scale to identify a subset of institutions in their network that are ready, willing, and able to undergo the transformational process.

Can an organization lead an application and be listed as a partner in another application?

Yes. Organizations are welcome to submit multiple LOIs. You can be a lead on one application and a supporting organization on another or multiple. However, if you are a part of multiple applications during final stage, the foundation will work with you to ensure that your organization would not be overburdened.

Can you please address if you would welcome intermediaries that work primarily with adults, NOT just high school to college populations?

Yes, we recognize that our target population, low-income students and students of color, is dynamic and has intersecting identities, including adult students, part-time students, and transfer students.

Some of the partnership models described as possible/encouraged under the rfp take significant time to come together. How should orgs think about this at the letter stage given the timeline?

Developing partnerships can take significant time and energy. At the LOI stage, we do not expect organizations to have formed partnerships. Instead we encourage you to consider how you might approach the work. For example, if you would like to be a lead intermediary for scale but are still in the

process of identifying partners please mention that. Similarly, if you see yourself as a potential partner, please identify that as well.

If we are partnering with another organization, do we submit *one* LOI on behalf of partnership, or does each partner submit separately? Wording & word limits of the questions suggest multiple LOIs.

Only one Letter of Interest is required per collaboration.

What do you see as general outcomes at the end of the 18 month grant period?

At the end of the first stage, we expect grantees to have: 1) completed a business plan outlining how they will approach this work, 2) explored and tested how to use key tools and resources with institutions, including the Institutional Transformation Assessment and the Postsecondary Data Partnership, 3) identified key areas for partnerships and have brokered initial partnerships to supplement and complement the work, 4) identified key capacity building areas and begun capacity building work.

What does investing in the capacities of the intermediaries for scale look like? Could this also include unrestricted funding?

During Stage 1, we will work with intermediaries for scale to identify key areas for capacity building and co-develop a plan for prioritizing and supporting capacity building in those areas. We do not anticipate providing unrestricted funding for this work.

Regarding intermediary org type: where would a network of private colleges seeking to work together to solve a problem fall?

It would depend on the lead intermediary for scale organization. Please see the glossary for an outline of different organizational types.

Are you anticipating that orgs sustain the capacity building behind the life of the grant?

We hope that the capacity building provided to intermediaries for scale is beneficial beyond the life of the grant regardless of whether they continue with this work. At this time, we do not anticipate requiring that capacity building be sustained beyond the life of the grant.

Where will the slides be posted from the talks this morning, particularly Francesca's session?

Yes. The slides are available on our website. You can find the first day [here](#) and the second day [here](#).

Your slides just mentioned business plan and customers. Is there an expectation at some point that the institutions will become paying "customers"?

Yes. As a funder our goal is to catalyze change in a variety of different ways. In this work, we hope that institutions will recognize the benefit they receive by working with an Intermediary for Scale and eventually consider paying for the services they receive. Over the course of the different stages, we will actively work with Intermediaries for Scale to think about what that model may look like.

Will there be additional investments by BMGF in Intermediaries or the larger ecosystem after the 18-month period?

Yes! This request for proposal only encompasses the first stage of the work. At the end of these first grants, the foundation will evaluate intermediaries' progress and accomplishments and determine readiness for further active and engagement with campuses.

Do you have any thought on how long the Stage 2 of getting to scale is? That would help us think about how to get from where we could be at stage 3 and what "scale" we could be aiming for.

We currently anticipate Stage 2 to comprise of 24 months of work.

Talk about how you are resourcing the delivery of TA from Innovation networks through Intermediaries to institutions.

The foundation will be a facilitative role in introducing Intermediaries for Scale to the Innovation Networks. Ultimately, however, we expect that Intermediaries for Scale will form independent relationships with the Innovation Networks to best meet the needs of the institutions they collectively serve.

You mentioned the planning stage to be expected to be about 18 months, just like this investment. Are there plans to provide additional funding for organizations as they move through the 3 stages?

Yes, each of the stages will receive a separate funding. The exact length and total amount of funding is yet to be determined, but we anticipate both the grant size and duration to increase with each stage.

When will applicants learn if they've moved on? For example, will the request for information be complete by May 10 or commence then?

Stage 1 applicants will be notified on April 16th.

At what point in the application process should partnerships be solidified? Should specific partnerships already be included in stage 1?

Partnerships may be solidified during investment planning or may be solidified as part of the staged development towards intermediaries for scale.

Would you consider conducting your site visits "in the field" with the prospective partners so you can see how we currently do our work with university partners?

Absolutely. We will work with applicants to create the site visit structure.

Re: blind review: won't it be somewhat easy to identify an organization based on the description of activities/programs? Should we think intentionally about making ourselves un-identifiable?

We will do our best to create a double-blind review process by 1) redacting identifying information (e.g., names, acronyms), 2) having each application be reviewed by two program officers (program officers will not know who the other reviewer is), 3) program officers will not assigned organizations they know well. That said, we recognize that applicant organizations may still be identifiable. Organizations should not worry about making themselves un-identifiable.

How will you calibrate depth of capabilities vs breadth of reach in the blind application stage?

We are interested in a portfolio that balances both reach and depth, however, at this stage in the process, we will not downselect based on these criteria.

How is being on multiple applications not an immediate flag re: commitment to a single plan?

We understand that at this stage in the process, organizations are still exploring different opportunities.

Do you require letters of support from partners at the LOI stage?

No.

Should organizations that could possibly be both lead org for a network and operate as an individual org submit one application or two (one as network, one as org)?

Although organizations are welcome to submit multiple applications, we do not expect to award single organizations for multiple applications. We believe that any one application will draw significantly on an one organization's capacity, and we would like to diversify the portfolio to the extent of our investment capacity.

What is the expectation of the Frontier Set intermediaries in the context of this RFP?

The Frontier Set will continue to develop, with their intermediaries, the field's understanding of transformation, along with the transformation tools and resources that intermediaries for scale (and the institutions they serve) will use.

How prescriptive will BMGF be regarding capacity building?

The capacity building will be related to the specific qualities and activities that the organization needs to develop in order to operate at greater scale. We currently have a "working definition" for these attributes, along with a self-assessment that intermediaries can complete in order to understand their current capabilities. We expect to (potentially) build capacity in any of these areas; if we learn that other developments are necessary, we may also invest in those.

If 30 institutions is not considered “larger scale” (re: AAC&U Pathways) what is an idea target?
30 institutions is considered larger scale from the 9 CBD colleges that developed guided pathways; Chrystie meant to indicate in her comments that 30 institutions was much smaller than the expected number of institutions for the portfolio (about 400).

Would a smaller organization be less competitive without identified partners vs a large organization or company?

Not necessarily; we have not identified a minimum number of students or institutions served because we are open to the potential for smaller organizations to bring big talents to the portfolio.

Will the Gates Foundation serve as a matchmaker if a capacity partner applies but really needs to be part of a larger network effort?

We anticipate that we may see some opportunities for partnerships at the close of the LOI stage. We will avoid "match-making" as we have found that "arranged marriages" do not work! We will make introductions and encourage partners to explore ways that they may work together, but the decisions will be made by the partner organizations.

Are the 7-10 intermediaries to include current partners? For example, those orgs being highlighted here who are already in partnership like jobs for the future?

Jobs for the Future is included in the portfolio; partners for Jobs for the Future are not. Similarly, lead organizations representing partners/coalitions/networks selected will comprise the 7-10.

Will there be future funded phases of this work? Is there a follow-on 18-month phase II?

We currently expect to fund future phases of the work; this will be determined through review of stage one milestones, and mutual agreement with the foundation and each partner comprising the portfolio.

How many students are you hoping to assist towards success in higher education?

The target number of students has not yet been identified; we will estimate both the number of students and the number of institutions that the portfolio will target after intermediaries for scale are selected.

CONTINUOUS LEARNING, POSTSECONDARY DATA PARTNERSHIP, AND INSTITUTIONAL TRANSFORMATION ASSESSMENT

While good practice I'm sure, how much of a burden is it for institutions to provide the ITA and PDP data? Are most able and willing?

We find that, as with any first data collection, the first PDP submission does take institutions some time to complete, but that subsequent data collections are substantially shorter because institutions can reuse code. NSC holds webinars to help institutions construct their submission files as well. In general, institutions are very interested in the PDP because they see the value of common metrics across institutions, along with the near-term progression metrics.

Similarly, with the ITA, we find that institutions can be initially resistant, particularly if it is not well communicated to them about why it is valuable. However, we have seen time and time again that institutions hold the tool in high regard at the end of the process due to the power of the group conversation.

What about employment data? It's key for a lot of this transformation but hasn't been discussed much.

The PDP does not currently collect employment data, but we do hope that employment data can be merged with PDP in the future either through an expansion of NSC's Census pilot or other workforce data field projects.

Data seems to be a serious capacity issue for many who would otherwise be strong candidates. How will you support capacity building in the effective use of data among intermediaries?

As with other capacities described, intermediaries do not need to be fully proficient in data capacity and use at this stage. This capacity can be developed during Stage 1 of the grant.

How can we learn more about the mechanics of the PDP process with NSC?

The NSC website includes a separate webpage for the [Postsecondary Data Partnership](#) which includes more detailed information about the submission process.

At what stage in the RFP process will we need to write the use of NSC and ITA into the proposal? Will we receive support on how to best integrate this into our specific projects?

We expect that Intermediaries for Scale will leverage the PDP and the ITA. We will provide more information about the support the foundation will provide at future learning events.

Many college leaders are hesitant to share their bad news and do not want outsiders coming in to tell them what and how to improve. Will u consider relationship building?

We hope that part of the role of an intermediary for scale is to build relationships with the institutions to encourage this culture change. In addition, only those schools receiving deep implementation services will need to share data via the PDP or ITA.

What can Gates share about enabling better data readiness? (Data is only good if it's clean - many institutions are challenged with clean data, systems optimization, etc.)

The foundation recognizes the important of technical assistance support to institutions and to intermediaries for scale. We currently provide support to Achieving the Dream (ATD), the State Higher Education Executive Officers association (SHEEO), and the Association for Institutional Research (AIR) to provide TA to existing PDP participants. We anticipate providing additional support to the intermediaries for scale.

What is the cost for PDP participation?

NSC is currently developing their pricing and sustainability plan and expects to announce pricing by the end of the spring academic year. Note that this pricing must adhere to the [BMGF Global Access commitment](#) and that the foundation will be providing support to subsidize initial adoption over the next several years.

What is the best example Gates has seen to date for an intermediary speeding up/effectively facilitate learning and sharing of effective practices/resources?

Achieving the Dream (ATD) has done a great job of providing PDP information targeted specifically to their membership organizations. They have worked in collaboration with NSC to create those materials and they also held a pre-conference workshop about the PDP submission process during their 2019 annual Dream conference.

Data shows students now attend multiple HEIs. Using HEIs as the unit of analysis may reinforce an outdated model. What role for intermediaries in supporting student success across institutions?

Working with NSC provides participating institutions and intermediaries with data about students who transfer across institution and state lines, which could be a programmatic focus for one or more of the intermediaries for scale.

The discussion about the PDP was about institutional access and use. What about intermediaries?

While institutions can use the platform for identifying trends across time and areas of improvement within their institutions, intermediaries can look across schools to identify and share larger trends and best practices unique to the schools in their network. Also, the PDP data sharing agreement includes options for institutions to allow intermediaries access to data at an appropriate level of identification or aggregation to support their transformation efforts.

Is PDP ready for intermediaries? Is there capacity to support our institutions in real time?

Yes, several intermediaries are already using the PDP for their data collection, including ATD, JFF, and Complete College America. Strong Start to Finish also includes the PDP as one data submission option for newly joining state systems.

Will intermediaries have access to the PDP and ITA data for all of the institutions we would serve?

Yes, as long as the data provider (e.g., institution, system, or state) has granted that access to the intermediary in the data sharing protocols.

Will there be a cost to intermediaries to use the PDP in addition to institutions?

NSC will announce pricing for PDP users later this year, which will go into effect beginning with the fall 2020 data collection window. Note that intermediaries for scale selected through this RFP process will receive foundation support for their access and use of the PDP through the end of the grant period.

Are student leaders consulted during the ITA process?

They haven't been to date. However, institutions can bring in other data sources (such as CCSSE) into the consensus conversations to get a broader set of information on campus context.

Why does the Gates Foundation focus on data specifically? Can you talk about this in context with things like cultural competencies?

We have learned from the field that data are at the center of successful transformation efforts to close equity completion gaps. Reviewing disaggregated data is a start but discussing those data and solutions to the issues they reveal should be done in partnership with faculty, staff, and students to ensure the resulting interventions are culturally relevant for students.

Do you feel that the term data-driven vs. data-informed is dehumanizing? It seems to imply that the data tells people what to do - think sophisticated models or algorithms.

Data don't drive people do. Data are a language that helps us understand and tell student and institution stories in order to support our efforts to improve the student experience. Also, both quantitative and qualitative data are necessary and relevant to transformation work.

What is the lens used to interpret data? How is this impacting importance of what is seemingly relevant?

Equity. The primary goal of this work is to close equity gaps in completion. The interpretation and use of data should first and foremost apply an equity lens.

The Clearinghouse makes institutional use of data accessible (via Student Tracker) but intermediary use thereof is not as accessible - especially from a cost standpoint. Does the PDP mitigate this?

Yes, the PDP dashboards are designed with feedback from both institutions and existing initiatives. We anticipate continued refinement of these products as the PDP matures. And as noted above, intermediary access is negotiated as part of the data sharing protocol that institutions and/or systems sign to join the PDP.

Can intermediaries use the PDP as well as their own data framework to go deeper if needed?

Yes. The analysis ready file with student level data on all KPIs makes this even more accessible to institutions and intermediaries.

Does the PDP allow institutions to compare themselves to similarly situated institutions?

NSC sees this as a future enhancement after there has been sufficient state, system, and institution adoption of the PDP.

The institutional pricing structure with NSC was never an issue. The intermediary pricing can be quite cost prohibitive. How will you address this?

NSC is currently developing their pricing and sustainability plan and expects to announce pricing by the end of the spring academic year. Note that this pricing must adhere to the BMGF Global Access commitment (<https://www.gatesfoundation.org/How-We-Work/>) including for intermediaries. Current estimates are much lower than initiatives have spent in the past on setting up their own data collections.

How many institutions are currently participating in the PDP?

There are about 100 institutions submitting data to the PDP at this stage, including three state systems. Several state and system offices are currently reviewing the data sharing agreements for 2019 participation.

Key data elements are defined differently by college and state. In some states the gateway math course is Intm Algebra, in others it must be a transferable course. How does the PDP handle this?

Institutions identify their own gateway courses during the submission process. NSC has discussed these challenges with their initiative advisory committee and will continue to refine their submission process to promote comparability across institutions and states.

Is there space within the portfolio for an organization whose primary role would be knowledge creation, translation, and dissemination? Does every intermediary need to deliver TA directly?

There could be space in the portfolio for an organization like this. We realize that applicants have different strengths and sets of expertise - we are excited to learn more about them in the Letter of Intent. Not every intermediary will need to deliver TA directly to institutions.

Do institutions already pay to publish data in or use NSC? Would this be an additional cost to access data they already pay to share?

NSC is currently developing their pricing and sustainability plan and expects to announce pricing by the end of the spring academic year. Note that this pricing must adhere to the [BMGF Global Access commitment](#). Current assumptions include an additional fee for institutions beyond existing NSC products, however, NSC does incentivize data providers with lower costs for submission of more data.

How will the intermediary for scale engage with the ITA process at scale?

Our current thinking is that intermediaries for scale will help institutions administer the ITA. In addition to providing value to the institutions through supporting the process of reflection and prioritization, it also provides information to the intermediary about their colleges. Then, the intermediary can use this qualitative data to better serve its colleges.

Do the efficiency metrics encourage a race to the bottom that limits resources for innovation?

The efficiency metrics in the IHEP framework were sourced from current efforts to improve completion in the field, notably Complete College America. Examining efficiency from both an institution - and a student - perspective - can help identify ways in which to lower the amount of time and resources needed to help low-income students and students of color to achieve their postsecondary goals.

Sample reports available? Even if IHE info redacted?

We anticipate NSC will share sample reports during subsequent learning events.

Are the PDP tableau sites public?

Each data submitter is given an administrative account that allows them to grant and restrict access to their Tableau dashboards.

What if there are pieces of the ITA that are not applicable to our institutions (i.e., developmental education)?

This is generally resolved in the consensus and next steps discussion. If an institution doesn't work on a certain component (e.g., does not offer developmental education), the team can decide to not discuss it. Additionally, for the individual assessment, there is a "Not Applicable" option for each indicator.

At which stage of development is the ITA tool, how many future iterations do you expect there will be?

The ITA has gone through multiple rounds of testing where we work with institutions to closely observe their usage of the tool. We've also incorporated feedback from the pilot use cases last school year. The tool has room to improve - we suspect that there will be improvements made on a yearly basis in the spirit of continuous improvement.

How do we access the ITA tool? A google search wasn't helpful.

Please reach out to Hyunjun Kim (hyunjun.kim@gatesfoundation.org) for a link.

Have you thought about how you might standardize who and how many people at each campus take the ITA?

We are continuing to learn more about who the right people to take the ITA. Our current hypothesis is that it varies by institution, though there is value in having the leadership team take it, since they are generally pulled into the consensus discussion.

What is the cost structure for the ITA?

We don't know yet. One of our core principles is to ensure that the tool is accessible and affordable for those who need it.

How accessible is the ITA and NSC data to 3rd party entities (like foundations, for-profits, and non-profits) who may benefit from data access?

*The core principle of data access is protecting the institutions and their data. Third party organizations, including the Bill & Melinda Gates Foundation, **will not** have access to identifiable student data. This includes student-level data for the NSC PDP and individual data for the ITA. PDP data submitters must approve access to their reports and analysis-ready files. For the ITA, any institution-level data for the Bill & Melinda Gates Foundation will be de-identified, except for the Frontier Set, where a separate data sharing agreement exists.*

How does the institutional profile that is used for ITA get created - or is this an example for this exercise? Wondering how information/data rather than opinions are gathered for this process.

The institutional profile is an artefact created for the exercise in the Learning Event. However, similar processes may be happening at institutions to ensure that the people taking the ITA are aware of ongoing efforts.

How many additional institutions does NSC have capacity to support through the PDP?

PDP is currently expanding from about 100 institutions with a goal to support 300-500 institutions in the next two years with additional capacity to be added as needed to support foundation and field initiatives.

How does the ITA account for affordability and student-centered financial aid practices and addressing affordability/cost-related barriers to completion? Is it under the umbrella of student services?

We are currently working with NASPA to create an Emergency Aid rubric for the ITA that will address some of these components. However, we realize that doesn't completely cover affordability and financial aid. We will think about that going forward.

Will the foundation support the intermediaries to conduct the ITA process?

In the past, the Foundation has supported intermediaries by providing materials that outline best practices for administering the ITA (including facilitating the consensus conversation), as well as technical assistance around building a plan for rolling it out. It has not been determined what future support will look like, though we imagine that similar resources will be available.

How will PDP and ITA requirements work if individual colleges are served by more than one intermediary? Which intermediary will be responsible? Who will track participation across all of the partners?

To administer the ITA, an institution will work with one intermediary. If that institution is working with multiple intermediaries more broadly, then the intermediaries will need to connect and determine who will be responsible for the ITA. We are still working through who will track participation across all partners.

For the PDP, institutions work directly with NSC to join and submit data and then grant access to individual intermediaries in their data sharing agreement. That will allow intermediaries to work from the same information but focus on elements that are of particular interest to their network. Because we are focusing on state system adoption in 2019-2020, intermediaries may find that their institutions are already part of the initiative by the time they are ready to support them through a scaling grant.

Will BMGF pay for the use of ITA? Do the institutions pay? Do the intermediaries pay?

We are still working through what this will look like.

What's the turnaround time for the PDP to provide data to intermediaries? How can intermediaries access real time data to assess interventions?

As NSC transitions the PDP from pilot to scale, they anticipate sharing reports with institutions and intermediaries 8-12 weeks after data collection is complete.

Who are the stakeholders that should answer the ITA questions? How long does this process typically take?

Institutions typically send out the ITA to about 10-15 people on their leadership team. However, this varies by institution. For example, some may choose to send out the shorter 30 question version of the ITA to a broader set of people on campus.

The 100 question version of the ITA takes an average of 45-50 minutes to complete.

Can taking the ITA be part of our strategy in working with institutions or so they have to take it first before we engage with them?

Administering the ITA can be a part of an intermediary's strategy in working with institutions.

Thinking of the ITA as leading to a continuous improvement process, How often do institutions go through the this exercise?

We recommend taking it on a yearly basis for both implementation and evaluation purposes, though we continue to learn about what recurrence cycle is most effective for institutions.

SOLUTIONS AND INNOVATION NETWORKS

How do you anticipate intermediaries for scale will interact with the solutions networks?

Intermediaries for scale will rely on solution networks to deliver subject matter expertise and technical assistance about solution implementation and integration with capacities to institutions seeking to transform.

What are some of the other innovations or interventions that the foundation is considering?

The foundation is prioritizing our three core solution and innovation areas over the course of the "proof of scale" phase of this work. As we learn, and based on needs of postsecondary institutions and the intermediaries for scale, we will evaluate the inclusion of additional, evidenced-backed solutions with the potential to scale.

What is the most common critique of the foundation's "evidence-based" approach to identifying where and how to invest?

We have received feedback that in the early years of the foundation's strategy, we may have been too heavily reliant on seeking to scale individual solutions. Based on this feedback and what we are learning about what it takes for institutions to transform, our strategy has matured and is now more focused on holistic institutional transformation, of which solutions are a key contributor. Implementing individual solutions is insufficient for broader holistic institutional transformation.

How do you all define and differentiate: mentoring, advising and coaching?

Mentoring, advising, and coaching fall under the purview of the "Technology Enabled Advising" solution area.

Has there been any study of how these solutions interact with each other during implementation?

Are there diminishing returns to investing in multiple solutions or do they build on each other?

In both the Frontier Set and Guided Pathways efforts, we've learned that a well scoped and strategically implemented series of innovations can lead to a whole which is greater than the sum of its parts. Our solutions, taken together, can support institutions in creating supports for students to choose a path, get on a path, stay on a path, enable learning.

Why specifically does the foundation support digital learning, developmental education, and advising?

[The foundation supports digital learning, developmental education, and advising because they have been identified and key loss and momentum moments on the student journey through higher ed.](#)

How have faculty been engaged in development and implementation of these solutions and do you have any advice for us with regard to faculty engagement/buy-in?

Faculty have been consequential in the discovery, development, and refinement of each solution. The foundation has funded many faculty over the years to test and provide feedback on the solutions and to codify implementation best practices. Engagement of faculty and other key implementation stakeholders is an expertise held in the solution networks.

Can "evidence-based" include a formally untested intervention that is monitored and that addresses a well-documented "pain point"? Eg Georgia state had to start somewhere.

No. We are focused on scaling evidence-based interventions that have demonstrable proof of efficacy and impact for low income students and students of color.

Does the foundation have a perspective (or have evidence) on how these solutions should be sequenced and what capacities need to be in place before implementation?

The foundation and our partners are evaluating and documenting the relationships between solutions and capacities, as well as the sequence of implementation that enables the most impact in varying contexts.

Do you have examples of interventions that lead to positive equity outcomes, eg by race/ethnicity or income?

All three solution areas have demonstrated positive impacts on specific sub-populations, although there are some gaps in the evidence that our Solution Networks will be seeking to address as they support implementation.

Which solution(s) have the best evidence that they work for low income students and / or students of color?

All three solution areas have demonstrated positive impacts on specific sub-populations. Collectively, and when implemented thoughtfully, the integrated implementation of solutions (and capacities) have the most impact for students.

Do you anticipate that intermediaries work with institutions across all Gates solutions? Or will you be looking for different intermediaries to focus on different solutions?

Intermediaries may have more expertise in a solution than others. Intermediaries will focus on supporting institutions where they are and pull in the priority solution networks where relevant based on the needs of their institutional base.

How are or have student been engaged in development and implementation of these solutions? Particularly students of color that are often ignored, invisible or marginalized?

The efficacy of these solutions was determined based on impact not only to overall student success, but also to the success of specific sub populations of students with the disaggregation of impact data. Efficacy testing also considered student satisfaction with different products, practices, and approaches.

For IFS will the foundation only invest in the three evidenced based solutions discussed or could we include other solutions in our proposals?

An IFS can include other evidence-based solutions in their proposal but that wouldn't absolve the intermediary of still working with ecosystem partners (i.e., solution networks) to help their colleges and universities improve implementation of these three solutions.

Why not just build out the capacity of the solutions network instead of adding an additional layer of intermediaries for scale?

We have learned from institutional partners over many years, that the sum of the parts is greater than the whole. To achieve institution-wide transformation and lasting impact, institutions who integrated multiple solutions and capacities. Intermediaries for scale play the crucial role of educating institutions about integrated approaches and preparing them for their transformation journeys.

I'm curious whether BMGF considered inviting potential grantees to apply either as intermediaries or solution networks. Many attendees here seem to qualify for one or the other, as defined here.

The foundation is currently prioritizing three solution areas with our solution network investments. Intermediaries for scale will focus on developing and/or supplementing scaling capabilities through partnerships during the first stage of the grant process.

How much room is there to try "new" interventions that previously weren't considered important enough to test - because the problems they solve were under-recognized. A big issue with equity.

The foundation is currently prioritizing three solution areas. Based on the needs of institutions, we may consider future evidence-backed interventions.

To what extent and how do solution networks work together?

Solution Networks are meeting regularly and actively engaging in discussions about integration and better and more unified engagement with colleges and universities.

What is the difference between a solution network intermediary and an intermediary for scale?

A solution network intermediary leads a network of subject matter experts who engage with institutions seeks to improve in specific solution areas. An intermediary for scale (IFS) leads cohorts of institutions to understand transformation and embark on their journeys. IFS will connect institutions to the solution networks for more information and services about specific topics.

If change needs to happen at the institution level, how have you as intermediaries supported transformation at the individual institution level? Many/all of your partners are at the intermediaries.

Transformation at the institutional level will be supported in a few ways. First, solution networks and other service providers have direct on the ground experience partnering with institutions. Intermediaries will play a key role in connecting them to institutions that need those services. Next, intermediaries for scale will facilitate cross-institutional learning through networks, so that institutions can share best practices.

How will the foundation handle IP? If an intermediary uses an existing tool, do they retain ownership?

All our investments are governed by our [Global Access](#) policy.

Have these programs had positive equity outcomes?

Each of our three solutions have generated impact for low-income students and students of color. Solution Networks will help us ensure that many more students benefit from the impact of these evidence-based interventions.

Can we apply as a solution network?

No. This RFP is for intermediaries for scale, not for new solution networks.