



iPD Challenge: Leveraging Network Partnerships

Request for Proposal Guidelines

Statement of Interests due:

April 11, 2014

***Final grant proposals (by
invitation only) due:***

May 9, 2014

Background

Teachers are at the center of our College Ready strategy: from better preparing teachers to enter the profession, to providing current teachers with the tools and supports they need to continually improve their practice. The Common Core, new evaluation systems, and new blended learning technologies are bringing new challenges and opportunities for teachers but we know they need much more robust support systems if they are to alter their practices in order to dramatically increase student success in their classrooms.

Two years ago the College Ready Work team launched an effort focused on redesigning professional development systems in districts as a way to more systematically support teachers. We called this work “iPD.” With input from existing partners and consultants, we identified a set of conditions and components for an “iPD” system that is more personalized and calls for higher levels of teacher engagement and collaboration (see *Exhibit A*). Fourteen districts and charter management organizations, along with a small group of technical support providers, began the first year of design, planning and implementation to transform their organization through an iPD Challenge. Districts include Jefferson County, Long Beach, Fresno, NYC, DC, Denver Public Schools, Bridgeport, New Haven and Tulsa. The Charter Management Organizations are Strive, Alliance for College-Ready Public Schools, Green Dot, Partnerships to Uplift Communities (PUC), and Knowledge is Power Prep (KIPP).

The **iPD Challenge** is designed to help districts:

- **Create much more effective learning systems** that include choices and higher quality content, a balance of individual and collective learning, and higher levels of teacher commitment and ownership, informed by more sophisticated data analyses.
- **Increase district use of more effective models of delivery** (including use of in-practice feedback, video, simulations, online and blended learning courses, etc.) **and new forms of teacher collaboration** (i.e. professional learning experiences designed by teachers and led by teachers) to accelerate implementation of the Common Core.
- **Build systems and processes** for 1) **optimizing existing resources** (people, money and time) so the iPD systems are sustainable and supported by teachers; 2) **tracking the quality, cost, and efficacy** of professional development ; 3) creating **supportive policies and structures** that remove barriers to innovations that foster high quality teacher learning; and 4) supporting **committed leaders** in implementation.
- **Create more scalable solutions that travel across networks quickly and more broadly.** All participating districts belong to at least one network and will commit to solutions that can be used across multiple networks rather than boutique solutions that can only be used in one place.
- Demonstrate how professional learning systems connect specifically to **improvement of instruction and learning by individuals and groups** (schools, district-wide).

About the College Ready Work Team

The College Ready Work team focuses on creating systems that support good teachers, that help average teachers get better, and that help new teachers learn the profession so they can be good. We make investments in tools to improve teacher practice and collaboration, as well as invest in districts/networks interested in redesigning their professional development systems. We are trying to improve both the supply and demand for high quality professional development tools, content and resources in the marketplace. We seek partners who focus on treating teachers as professionals and engage teachers in defining and designing what they want to learn, in an effort to increase individual and collective capacity to accelerate student success.

Purpose and Goals

If we are to scale the iPD initiative beyond our direct investment sites, we know we must rely on many partners in the PD ecosystem. The purpose of this RFP is to invite innovative **network partners** who have strong district affiliations to join us in our effort to redesign PD systems in districts. Our goals are to identify new partners and a variety of roles networks might play in scaling components of iPD initiative.

Eligibility

Network partners are organizations that support multiple school districts and/or charter management organizations, and have a commitment or interest in helping a subset of their members redesign their professional learning systems.

Grant Amount and Uses

Grants will be awarded proportionately to scope, approach, potential reach and scale. A range for the grants will be identified after the letters of inquiry are received. Grant awards could be phased, in recognition of an agile design/pilot/implementation cycle if appropriate to the specific work proposed.

Grants can be used for the following but are not limited to:

- Develop and implement innovative solutions to spread awareness and assess interest in iPD system redesign within your existing member community.
- Help identified districts assess their readiness and develop strategic implementation plans for iPD system redesign. The foundation has developed a readiness assessment tool. Networks may opt to use their own existing tools, or a combination of both.
- Provide technical assistance on a specific element of iPD to your member community (see system map *Exhibit A*).
- Experiment with implementation of one of the iPD system redesign components (i.e. new digital technology and tools for coaching).

Network Facilitator Commitments

- Participate in face to face and virtual knowledge sharing sessions as part of a greater iPD community.
- Capture case studies & learnings from participants.
- Participate in evaluation (metrics and/or research relevant to your proposal).

Statement of Interest – How to Apply

Due by **5:00 PST April 11, 2014**

Start by clicking the application link below. The first time you visit the portal you will need to create an account. After you enter your information, a temporary password will be emailed to you. Return to the portal to personalize your password and complete your account profile.

1. Click on the [Application Portal link](#).
2. Create an Account
3. Select “If you have received an invitation... you may respond here.” on the home page and enter the following information:

Request ID: SOL1109186

Access Code: education2014

Please note:

- You can save the application and return to it later by logging in to the Application Portal at any time before the submission deadline with your email address and password. The Request ID and Access Code are only necessary the first time you access the application.
- You can only hit “submit” once using the application tool, so we suggest iterating on documents offline and submitting your final versions.
- You will receive a confirmation email once you have successfully submitted your full application materials. If you do not receive the email (check your spam folder), please return to the portal and try again.
- To view frequently asked questions about submitting your application, click Help on the Application Portal.
- We use the application portal mainly to create an entry in our internal database. After you use it once to submit your documents, you will send all subsequent documents as attachments via email.

Please direct any questions to college.ready@gatesfoundation.org.

Three (3) pages maximum

In three pages or less:

- Describe your organization: mission, membership (number of districts/teachers served/demographics) and current priorities.
- Tell us how your work relates to professional development and why this RFP is of interest to you.
- Discuss your previous contributions/interest in this field as well as capacity to lead this effort.
- Tell us how you would approach supporting/working with districts/CMOs who want to redesign their PD systems. What specific aspects of iPD are of interest to you?
- Identify any potential districts that you may work with.

Timeline

- March 10, 2014: Release of Statement of Interest
- March 25, 2014: Mandatory RFP Webinar and Q&A
- April 11, 2014: **Statement of Interest** (2-3 pgs.) due to the Foundation
- April 21, 2014: Selected organizations invited to apply for grant through a formal RFP
- April 24 & 25, 2014: Phone interviews, as needed with applicants
- May 9, 2014: **Final grant proposals** (10-15 pgs.) due to the Foundation
- May 30, 2014: Grant agreement send to awardees

Award

Funding will be awarded proportionately to potential reach and scale.

Selection Criteria

Applicants will be evaluated and awards issued on the strength of their proposals and supporting materials. We will select networks based on our priority geographies, capacity and vision for the work, and alignment to iPD.



BILL AND MELINDA GATES FOUNDATION

iPD Challenge: Leveraging Network Partnerships

Grant Application for Invited Participants ONLY

Grant Application

Table of Contents

- I. Executive Summary
- II. Current to Future State
 - a. Problem and Theory of Action
 - b. Target Audience
 - c. What You Hope to Achieve (Future State)
 - d. The Work Plan
- III. Measurement, Learning, and Evaluation
- IV. Risks and Challenges
- V. Budget Narrative
- VI. Appendices

Cover Page with Your Project Name

Please provide a name for this project that reflects the vision and energy of the project. Provide contact information for the project coordinator.

Section I: Executive Summary

One page

Begin with the name of your organization, how much money you are requesting over how many months, and a summary of your goals and project outcomes. Introduce us to your network: its members and the common goals you have. Tell us who you will specifically work with if this project will only work with a subset of your network.

Section II: Current to Future State

Two pages

a. What problem are you trying to solve (current state)

Tell us why PD is relevant to your organization and your history in providing PD. What does PD look like in your network and what PD problem are you trying to solve as part of this project. Why is iPD a good fit?

b. Who is your target audience (who will you work with as part of this RFP)

Which districts in your network will you work with and why? You may be only working with a subset of districts in your network. Provide demographics and numbers of teachers/students you will potentially reach. You should be working with at least three districts. Include letters of support in the appendix if you have them.

c. What are you trying to do (future state)

Now that you have told us the problem you are trying to solve and theory of action, as well as who you plan to serve as part of this project, tell us what the future state looks like in a few paragraphs. If you are successful, what will be different in your network? Include a simple table that summarizes current state and future state. This is an example of a summary chart based on some of the work we are doing in our districts; you should contextualize it to this project and might have different categories (see chart on next page).

Current state vs. Future State

	From	To
System changes	<ul style="list-style-type: none"> Teacher preparation programs lack rigor and alignment with expectations of the job Fragmented, one size fits all professional development, with no clear performance impact Highly challenging working conditions: rigid schedules, high class loads, widely variable student needs, limited technology and data access, etc. Teachers lack access to evidence base, insight into their performance and a system to help them improve Teacher have no control over time and resources and limited opportunities for collaboration and learning 	<ul style="list-style-type: none"> Certification and preparation focus on demonstrated proficiency on valid measures Personalized and effective professional development, accessed directly by teachers Differentiated roles that make success possible with existing resources Supportive delivery systems and actionable data Access to codified knowledge of effective practice, plus valid measures of performance with systematic feedback Teachers have some choice in how they spend their non-instructional time and have more time and resources to enable effective collaboration
Professional culture changes	<ul style="list-style-type: none"> Not all teachers feel strong accountability for improving their instructional practice Teacher are largely undifferentiated workers Teaching viewed as a low level profession Unions largely focused on work rules and protecting teachers District and school leaders implement change in a top down fashion with limited teacher involvement 	<ul style="list-style-type: none"> High mutual accountability within and across schools Teachers as researchers, innovators, designers, coaches, implementers, leaders to advance both teacher and student learning Teaching viewed as a high skilled, highly valued profession that attracts strong talent Unions focused on supporting teachers to improve teaching & learning District and school leaders enable teachers to own and drive system changes as an equal partner

d. Work plan (*Two to three pages*)

Your work plan should explain to us what you will do/when.

Describe what aspect of iPD you are interested in taking on (Figure 1). For example, will you pilot the readiness assessment or go deeply into one aspect of iPD? If you plan to use the Readiness Assessment or other tools described in the webinar, provide details on how you will use, alter or get feedback on these tools from your partners.

Figure 1. The iPD system map assumes that all system components are required for a robust and sustainable iPD system; however, not all districts/CMOs will start at the same place or focus on the same components as they design their transformation from the current PD system to an iPD system. Are there areas of the iPD System Components that are most aligned with your current membership priorities?

iPD System Components	
Personalized Learning for Teachers	<ul style="list-style-type: none"> • Systems to identify PD needs • Systems to create personalized PD plans • Extent to which the system offers multi-modal, teacher-led, PD offerings focused on Common Core • Systems to provide continuous feedback
Enabling Conditions	<ul style="list-style-type: none"> • Leadership capacity and retention • Resource optimization: Innovative use of time, money and staff (including finding serious amounts of teacher time during the day for PD or teacher collaboration) • Supportive policies • Change management/user adoption sophistication
Building Blocks	<ul style="list-style-type: none"> • Interoperable data infrastructure • User-friendly delivery infrastructure • High quality, Common Core aligned digital content and tools • Process to evaluate organization and efficacy of PD offerings
Teacher Leadership/Collective Development	<ul style="list-style-type: none"> • Extent of teacher input/ownership in PD, extent to which decision-making devolved to teachers, extent to which PD supports collaborative inquiry and collective team development, etc.

You may organize the work you propose by phases. Depending on the quality of your proposals and our resources, we may only be able to fund Phase 1 and 2, for example, so we want to be sure we understand how you would like to sequence your work.

Key elements you should address in your work plan:

- How long will each phase of work be? What components will you work on during each phase? What will be the outputs of each phase of work?
- What resources will you need in each phase? These can be human, financial, and technological.

- Who will be leading the work in each phase? Who is responsible for overall coordination across phases?
- How does your work plan build in flexibility, create opportunities for adjustment, and re-focus based on real-time learning and feedback from teachers?
- Who are your target participants at each phase and what geographic regions/districts might you be covering?

Section III: Measurement, Learning, and Evaluation

One page

Describe the impact and outcomes you seek as part of this grant and how you will measure that impact. Describe the practical and useful measures you will use to monitor your progress overall and by phase (if there is differentiation) and the process you will use to collect the necessary data. Be sure to include information regarding what systems you have in place or will have to create to measure your progress. We will also be looking for the explicit measures that your network will use to track teacher understanding of the shifts in the Common Core.

Section IV: Risks and Challenges

One page

What are the top three or four challenges to the success of this project, including ability to achieve the intended results within the planned timeframe? What keeps you up at night? How will you plan to overcome or address them? In addition to identifying the challenges, tell us what risks you are taking to do this work. What do you consider the most innovative or most disruptive change you are making?

Section V: Budget Narrative

One page

Please describe the costs associated with implementing your plan including other resources allocated towards this project, such as any anticipated grants and philanthropic resources over the course of the two year period.

Your budget narrative should include the following information:

- Explain specifically how your outcomes and outputs are supported by the proposed budget.
- Identify any factors that could significantly affect your organization's ability to operate within the proposed budget, and describe how your organization will manage or mitigate those factors.
- To the extent that your organization will be relying on additional funding, describe:
 - The proposed sources of funding (e.g., a grant from another organization or earned revenue generated by the project).

- The status of the funding sources (e.g., proposal submitted or grant awarded).
- The assumptions used to generate any estimates.
- Strategies and timeline for securing the necessary additional funding.

Example Budget Narrative Template: Project X

Direct Cost Details: *In your responses below, include total project costs including funds requested from the Bill & Melinda Gates Foundation as well as other funds being applied to the proposed project. If necessary, feel free to include the direct cost information requested below as an attachment to the proposal narrative.*

Provide the foundation with a description of the direct cost categories of the budget and how you arrived at the proposed expenses. Feel free to omit any categories in which there are no budgeted expenses.

- **Personnel and Benefits:** What are the roles and responsibilities of each full-time equivalent (FTE) or group of FTEs supporting the project, the rationale for the number of requested FTEs, and the methodology for estimating the base salaries (e.g., actual salaries or estimates based on similar job descriptions)? To the extent this project provides majority funding support for personnel that will be fulfilling functions important to the district after the life of this project, how will the district support that work after the life of this grant?
- **Consulting and Professional Fees:** Include a brief description of the work to be performed in support of the overall project, the current status of the contract(s) (e.g., confirmed or projected), and the cost assumptions used (including estimates of the number of days to be worked and the daily rate).
- **Materials and Supplies:** Describe the item(s) being requested, the business purpose of the item(s) as it relates to the project, and the cost assumptions used to generate the cost estimate.
- **Computers and Equipment:** Describe the item(s) being requested, the business purpose of the item(s) as it relates to the project, and the cost assumptions used to generate the cost estimate.
- **Printing and Publications:** Describe the item(s) being requested, the business purpose of the item(s) as it relates to the project, and the cost assumptions used to generate the cost estimate.
- **Travel and Accommodations:** Include a brief description of the travel required for this project. Include the methodology used to calculate the total cost estimates for each trip, the assumptions used to determine the appropriate number of trips, and the rationale for how those trips will support achievement of the results.

- **Conferences, Conventions, and Meetings:** Include a brief description of the meetings required for this project. Include the methodology used to calculate the total cost estimates for each meeting, including the estimated number of attendees and total cost per attendee. What is the rationale for how those meetings will support project results?
- **Direct Facilities:** Facility-related costs are typically covered by indirect costs and should not be included within the direct cost details. However, in rare cases, facility-related expenses can be included as a direct cost when a grantee requires additional building expenses in order to execute the grant (e.g., starting up an organization or creating a new regional office).
- **Other Direct Costs:** Describe the item(s) being requested, the business purpose of the item(s) as it relates to the project, and the cost assumptions used to generate the cost estimate.
- **Subgrants:** Describe the work to be conducted by the subgrantees and the anticipated budget for the work. If any subgrant exceeds \$100,000 or represents 25% or more of the project cost, provide a detailed budget showing the proposed subgrant expenses.

Section VI: Appendices

Please include the following documents along with the proposal:

- A. Outcomes and Outputs
- B. Budget
- C. Organizational Capacity
- D. Intellectual Property Questions
- E. Letters of support (if available)

Appendix A: Outcomes and Milestones

Please use the attached Results Tracker & Framework template

Appendix B: Budget

Please use the attached Project Support Budget excel template.

Appendix C: Organizational Capacity

Describe your organization's strengths and capacity to implement, manage, and monitor progress of this project, including:

- Briefly explain any changes you foresee to your current and next year's organizational budget.
- Depict any steps your organization would need to take to increase its capacity in order to successfully implement this project, the plan for doing so, and the

organization's plan for maintaining that capacity once funding for this project is complete.

- Explain any potential financial impact or risk to your organization associated with implementing this project.
- Describe any prior Bill & Melinda Gates Foundation grants your organization has received that are relevant to this proposal, and the results of those grants.
- With regard to any key partner organizations, subcontractors, and subgrantees that you have previously identified, describe what has made you comfortable with their capacity to perform as will be necessary for successful execution of this project.
- Describe specifically how your organization will administer and manage funds for this project, either directly or through a third party.

Appendix D: Intellectual Property Questions

Intellectual property that is used or generated during the Project or that may be important in the ultimate commercialization of the Funded Development plays a role in ensuring that Global Access is achieved. The questions that follow are intended to identify such intellectual property, its ownership and how it will be used to accomplish Global Access. In completing this form, mark "not applicable" as appropriate.

1. Will this Project use or incorporate Background Technology?

"Background Technology" means any and all products, services, processes, technologies, materials, software, data or other innovations that are created by you or a third party prior to or outside of this Project and that are to be used as part of the Project.

a. If so, please identify all Background Technologies. Where such technologies are the subject of patents or patent applications, comprise data bases, or are protected by copyrights, please complete the relevant Technology Reporting Template found in Appendix A.

2. How will the Background Technology be made available for use under the Project?

a. If you, as the direct funding recipient, own the Background Technology, please confirm that you will make the Background Technology available for use to achieve the proposed Project goals and Global Access.

b. If a third party owns the Background Technology, complete the relevant section in Appendix B to describe the agreement through which the third party allows use of the Background Technology to achieve the proposed Project goals and Global Access.

c. Do the existing agreement terms pertaining to Background Technology you own or that is owned by third parties create any obstacles to achieving the proposed Project goals and Global Access? If yes, please briefly summarize the obstacles and the specific steps that you will take to address them.

3. Will this project lead to the creation of Funded Developments?

“Funded Development” means any and all products, services, processes, technologies, materials, software, data or other innovations resulting from the Project (including modifications, improvements and further developments to Background Technology).

a. If so, will you create or develop the Funded Development? If so, please confirm that you will make the Funded Development available for use to achieve the proposed project goals and Global Access.

b. If another party to be funded under the Project (such as a contractor or sub-grantee) or a third party will be engaged in the creation of Funded Developments, complete the relevant section in Appendix B to describe the agreement through which the third party allows use of the Funded Development to achieve the proposed Project goals and Global Access.

c. Do the existing agreement terms relating to the creation by you of Funded Developments or with another party or a third party create any obstacles to achieving the proposed Project goals and Global Access? If yes, please briefly summarize the obstacles and the specific steps that you will take to address them.

d. Are there are uses or markets for the Funded Development beyond those described in the Project proposal? If so, please describe.

e. Do you anticipate making any modifications or improvements to the Funded Development after the proposed Project is completed?

4. Are the activities under this Project directed toward a final product or process that incorporates or uses the Funded Developments and that is made available to intended markets?

Such activities may include manufacturing, marketing, distribution, offer for sale, sale, or import.

- a. If so, please list all such Funded Developments and summarize your plans for the manufacture, marketing, distribution, offer for sale, sale, or import for the Funded Development and explain how you will achieve Global Access.

- b. Will you be solely responsible for implementing those plans for the Funded Development? If not, complete the relevant section in Appendix B to describe any agreements you have in place or anticipate establishing with other parties funded under the Project or third parties to proceed with such plans for the Funded Development.

- c. Do you foresee any obstacles to achieving the proposed further development goals and Global Access? If yes, briefly summarize the obstacles and the specific steps that you will take to address them.

Exhibit A iPD System Map

