



Request for Proposals (RFP)

Preparing for Post-Secondary Success Through the Wider Learning Ecosystem: *Designing High School Models that Provide Learning Opportunities Outside Traditional Classrooms*

Released March 31, 2017

Planning Phase Proposals Due by 4:00 PM on June 14, 2017

All questions related to the RFP should be submitted via email to EducationRFP@barrfoundation.org.

All RFP materials and updates will be made available on the Barr Foundation's RFP [webpage](#).



About the Barr Foundation

The Barr Foundation's mission is to invest in human, natural, and creative potential, serving as thoughtful stewards and catalysts. Based in Boston, Barr focuses regionally, and selectively engages nationally, working in partnership with nonprofits, foundations, the public sector, and civic and business leaders to elevate the arts, advance solutions for climate change, and connect all students to success in high school and beyond. With assets of \$1.6 billion, Barr is among the largest private foundations in New England and has contributed more than \$834 million to charitable causes since 1999. For more information, visit barrfoundation.org or follow [@BarrFdn](#).

In March 2016, the Barr Foundation announced a new Education Program goal to increase the number of New England youth who connect to success, both in and beyond high school. We seek to create a new vision of secondary education in New England that will focus in three areas:

1. Broadening the definition of student success to include competencies as well as mastery of academic subjects.
2. Supporting the development of new high school and program models that are flexible and conducive to innovation, and that move away from an outdated, one-size-fits-all approach to secondary education.
3. Advancing system conditions that support innovative school models.

Barr believes that all students can graduate from high school, successfully transition to post-secondary education, and engage in meaningful career opportunities. This belief is grounded in our firm conviction that all students can be:

- Exceptionally well prepared for next steps in life.
- Informed of opportunities to connect to success in high school, college, and career.
- Empowered to make choices that prepare them for success.

A significant opportunity exists to support this vision by helping more students connect to success in secondary and post-secondary endeavors, arguably one of the most crucial junctures in young people's lives. To this end, Barr is excited to join a growing national movement to rethink secondary education and definitions of student success.



Overview of the Request

Preparing for Post-Secondary Success Through the Wider Learning Ecosystem

In March 2016, the Barr Foundation announced a new Education Program goal to increase the number of New England youth who connect to success, both in and beyond high school. To reach this goal, the Education strategy is focused on supporting new secondary school models that help students develop the full range of competencies necessary for successful transitions to college and career in today's global economy and society.

These competencies can be developed through a variety of opportunities in a *wider learning ecosystem* comprised of organizations and institutions beyond the traditional high school walls. For example, by partnering with institutions of higher education, schools can offer early college experiences that build students' academic and non-academic skills—and familiarize them with the culture and expectations of post-secondary education. Strong connections with business and community organizations enable schools to provide meaningful opportunities for career exploration and immersion, as well as an introduction to the realities of the world of work. Anytime-anywhere learning opportunities send students out of traditional classrooms and engage the community in the educational process to provide students with comprehensive, holistic programs of study that prepare them for a wide range of post-secondary options.

Many high schools have adopted programs that enable students to explore and experience college, careers, and their communities. However, a large proportion of these programs target and serve a subset of a school or district's student population, rather than being accessible to—and even encouraged for or expected of—all students. In addition, these programs tend to compete for limited resources, making it difficult to bring them to scale and to sustain them in tight budgetary cycles. A recent [Barr survey](#) of practitioners across New England indicated strong interest in and need for offering high school students individualized, student-centered, flexible pathways to college and career.

This **Request for Proposals (RFP)** is the next stage of Barr's regional education strategy to support a new vision for high schools, and to catalyze innovation across the region toward the planning and implementation of public, whole-school educational models that transcend the school walls in order to help students develop the competencies required for a 21st century definition of student success. The Barr Foundation seeks to support and learn alongside existing high schools in New England in developing diverse, authentic learning opportunities as a core

school design feature to adequately prepare students for the realities and expectations of life after high school, including post-secondary education and the workforce. These high schools will capitalize on and engage their students in a wider learning ecosystem that includes the myriad educational, business, and non-profit organizations within the surrounding communities. Barr recognizes that strategic partnerships are crucial to schools' efforts to offer students a wide range of learning opportunities that help to build essential knowledge and skills, deepening, extending, and/or expanding college and career-aligned courses and programs of study.

We anticipate supporting up to 10 grantees focused on existing high schools that seek to develop and scale—through a whole school design—student access to high-quality learning experiences that look beyond traditional classrooms and programs of study to effectively boost students' college and career readiness and successful post-secondary transitions. This RFP is intended to support the planning and design of whole school models across New England that blend the lines between high school, college, career, and the community—not discrete programs or stand-alone interventions. Further, the RFP is intended to support the design of schools that open all post-secondary options to all students and help students identify their interests and goals, and is not intended to support school models that are focused on preparing students for a particular field or career path.

This RFP addresses a planning and design phase, for which applicants are invited to submit proposals for up to \$300,000 (for one high school) for up to two years of planning. Applicants may submit a proposal for more than one high school, and request a corresponding budget exceeding \$300,000 for the planning phase. However, we expect a multiple high school proposal to reflect economies of scale (i.e., the total budget should be less than \$300,000 per high school).

The planning phase may include activities such as facilitating a design team, deep investigation of student needs and interests, community engagement, training and technical assistance, visits to other high schools, pilot of new options that engage the wider learning ecosystem, and development of an implementation strategy. Based on the quality of the design developed, planning grantees may be invited to apply for an implementation grant.

Please note the following (estimated) project timeline:

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|------------------------|---|
| March 31, 2017 | RFP released |
| April 25, 2017 | Webinar for prospective applicants |
| May 12 – June 12, 2017 | Optional office hours via conference call |
| June 14, 2017 | Planning phase proposals due |
| October 2017 | Planning phase awards announced |
| Fall 2018 or 2019 | Launch of new, expanded, or improved models |

All RFP materials and updates will be made available on the wider learning ecosystem RFP [webpage](#) on an ongoing basis.



Context

As shifts in the global economy continue to raise the stakes for young people, it becomes increasingly essential that all students have access to a meaningful high school education that can lead to completion of postsecondary education and successful entrance into the workforce.

While the demands of the 21st century society and economy continue to evolve rapidly, many high schools have remained fundamentally unchanged for decades. It's no surprise, then, that the bridge connecting secondary school with post-secondary education and the workforce has largely fallen into disrepair. Many students who face personal, academic, or economic challenges to attending school disengage, and that process is accelerated if they do not see the relevance of continuing their education to their future aspirations. Indeed, even graduating high school is not a reliable signal that students are ready for the demands of college and career.

Despite completing the requirements for a diploma, many high school graduates find that they are not sufficiently prepared to meet the expectations of college and the workforce.

Approximately 20 to 30 percent of first-year college students must enroll in at least one developmental course; the percentage nears 60 percent at some two-year colleges. These courses—also known as remedial courses—do not yield college credit, but serve as prerequisites to many credit-bearing courses. Students who enroll in developmental courses are less likely to graduate than students who enter directly into college-level, credit-bearing courses.¹ In addition, the extent to which students enter post-secondary education with relevant skills such as critical thinking and problem solving; self-direction and perseverance; learning strategies; and “wayfinding” abilities² will affect their ability to persist to graduation.

The knowledge and skills gaps of many high school graduates impacts their ability to enter and succeed in the workforce as well. According to a 2016 survey of business leaders in one New England state, employers are challenged by insufficient levels of preparation in areas such as teamwork, critical thinking, communication—and even basic reading and math. Further,

¹Jimenez, L., Sargrad, S., Morales, J. & Thompson, M. (2016) *Remedial Education: The Cost of Catching Up*. Washington, DC: Center for American Progress.

² Next Generation Learning Challenges. (n.d.). MyWays. Retrieved March 30, 2017, from <http://nextgenlearning.org/myways>

approximately 75 percent of respondents reported job openings that they are unable to fill with the current pool of applicants.³

Misalignment between what traditional high schools offer and what postsecondary institutions and the workforce expect and require can derail students' aspirations. For example, without adequate preparation, the time and cost to complete a post-secondary credential can be prohibitive to many students. Students need early exposure to and guidance through learning experiences that elucidate and help them prepare for the realities of college and career. In addition, students need opportunities to explore their interests and build the knowledge and skills necessary to successfully pursue their chosen post-secondary path.

Youth development theory tells us that young people will pursue opportunities that help them meet their developmental needs, and that they will thrive in settings where they have access to the right balance of supports and autonomy to actively pursue the competencies that matter to them. The scientific evidence from across a range of disciplines—social psychology, cognitive science, and education—is now quite strong that this balance is intrinsic to learning and academic achievement, and not incidental to it. The research literature makes a convincing case for placing youth development principles at the center of school and curricular design, as they address the essence of what activates and sustains student engagement in learning by tapping into adolescents' ongoing navigation of the developmental tasks they are confronting.

According to Robert Halpern, an expert in the field:

“Young people need experiences that actualize new cognitive and social skills; that foster curiosity, persistence, and competence; that nurture the will to learn and the desire and the courage to invest in further learning experiences. They need learning settings that are demanding yet also responsive to developmental needs and differences... and they need experiences that provide opportunities to contribute—to a discipline, cause, community, or traditional or emergent cultural endeavor.”⁴

Innovative high school models that are responsive to students' needs, as well as the expectations of the world beyond the school walls, can help students navigate a path to post-secondary success. These models can address readiness gaps and promote successful post-secondary transitions by utilizing an expanded definition of what it means to be college and career ready, and through a school design that offers a wide range of learning opportunities that align with that definition. While mastery of academic standards and subjects remain essential to student success, additional competencies are required for students to succeed in secondary achievement, post-secondary enrollment and persistence, and career/workforce pathways.

³ The MassINC Polling Group. (2016, September 20). *Mass. business leaders focus on real world skills, good teachers* (Rep.). Retrieved March 30, 2017, from website: <http://www.mbae.org/wp-content/uploads/2016/11/FINAL-Report-2016-MBAE-Employer-Poll-for-web.pdf>

⁴ Robert Halpern, *Youth, Education, and the Role of Society: Rethinking Learning in the High School Years* (Cambridge, MA: Harvard Education Press, 2013) 6.

These competencies can be developed through a variety of opportunities in the wider learning ecosystem. For example, early college models expose students to the post-secondary environment and allow students to earn college credit, reducing the time and cost to completion. Career exploration and immersion—particularly through formal, integrated, and progressive experiences—enables students to gain a better sense of their interests and options, and connects the relevance of their coursework to their future plans. Anytime-anywhere learning opportunities enable students to participate in experiential learning and build social capital in the community; and community partners augment the capacity of schools to provide comprehensive, holistic programs of study that prepare students for a wide range of post-secondary options. These examples are not mutually exclusive, and may be blended together to provide a robust network of formal learning experiences for all students. Schools that systematically broaden all students' exposure to the wider learning ecosystem must be designed fundamentally differently than their traditional counterparts.



Request for Proposal

Planning & Design of Schools Within a Wider Learning Ecosystem

The Barr Foundation is seeking proposals focused on existing public high schools across New England that seek to develop and scale student access to high-quality learning experiences that access the wider learning ecosystem to effectively boost college and career readiness and successful post-secondary transitions for students. Competitive proposals will have a strong vision for expanding the learning environment beyond traditional high school classrooms. Successful applicants will view place and time as opportunities rather than constraints, and will be committed to organizing their schools to leverage assets in the surrounding community. Our goal is to support the development of exemplary schools across the region that can powerfully demonstrate the impact of student-centered approaches that intentionally address the knowledge, skills, and experiences necessary to sufficiently prepare students for post-secondary success. Respondents to Barr's [survey](#) of practitioners indicated great interest in pursuing this type of work, and especially in deepening partnerships that provide students with exposure to higher education and career opportunities.

This funding opportunity focuses on improving post-secondary readiness and outcomes for New England youth by supporting and promoting promising public high school models that provide *all students with learning opportunities outside the traditional classroom as an integral component of the schools' mission, design, and program of study*. Our goal is to support the development of a group of schools across the region that we can collectively learn from and that serve as inspirational exemplars for the design and implementation of responsive, flexible, and student-centered schools that bring to life the tenets of college and career readiness by providing all students with access to and engagement with college, career, and the community. The success of these schools will provide critical insights into how best to design schools around the wider learning ecosystem, lessons that we believe will be applicable across the entire landscape of high school programming.

For the purposes of this RFP, the term "schools," refers to diploma-granting entities that offer students integrated, full-time academic and social supports in holistic learning environments, which are tailored specifically to address students' comprehensive needs toward achieving college and career success. **Please note that this RFP is not intended to identify or fund stand-alone initiatives or programs that target only small numbers of students or subsets of the**

student population—including those that take place within or in partnership with traditional high schools.

Successful applicants will have a vision for public high school models that utilize evidence-based strategies and practices to provide students with **credit-bearing learning opportunities in the wider learning ecosystem**; rather than peripheral programs, they will be central components of the school's program of study. At scale, these opportunities will be available to all enrolled students, though the model may involve a progression of experiences that students engage in at different times throughout their time in the school. Proposed models may incorporate one or more of the following elements:

- **Anytime-anywhere learning opportunities** that enable students to participate in experiential learning and build social capital in the community; and augment the school's capacity to provide comprehensive, holistic programs of study.
- **Career development** experiences that promote student awareness of their interests and options, and deepen student engagement in school through connecting the relevance of their coursework to external opportunities.
- **Early college** experiences that expose students to the environment of post-secondary education, and enable students to earn college credits while completing the requirements for their high school diploma.

In addition, Barr has adopted the following set of design principles⁵ that we anticipate successful applicants to this RFP will incorporate into their school models:

- **Equitable access:** All students will be prepared for and supported through experiences in the wider learning ecosystem.
- **Guided academic pathway:** High schools and their partners will integrate experiences in the wider learning ecosystem coherently into the academic program to create a viable path to post-secondary options.
- **Enhanced student support:** The school design will include comprehensive supports that address students' academic and non-academic needs.
- **Attention to student interests and goals:** Schools will help students develop workforce skills such as teamwork, communication, and interpersonal skills through experiences that promote exploration of interests and cultivation of post-secondary aspirations.
- **Deep partnerships:** The school and its partners will share responsibility for the development, implementation, and sustainability of the model, and will work together to execute the school's mission and vision.

⁵ These design principles are adapted from Parthenon-EY's report on the early college landscape in Massachusetts:
http://cdn.ey.com/parthenon/pdf/perspectives/Early-college_Report_final_web.122016.pdf

- **High expectations for all students:** All students—regardless of the wider learning ecosystem and other school opportunities they participate in—will be prepared and empowered to enter a range of post-secondary options, including four-year colleges.

Applicants are invited to submit proposals for up to \$300,000 for up to two years of planning to support development of their school. Design activities that the funding may support include, but are not limited to, the following:

- Identifying and facilitating a design team comprised of representatives from across the wider learning ecosystem, and enabling them to devote sufficient time to the process;
- Investigating the characteristics of the student population and assessment of their needs, facilitated at least in part by an analysis of student data;
- Engaging the community in a process to solicit input for and feedback on ideas and plans, as well as to generate buy-in and productive collaboration across stakeholders;
- Training and technical assistance;
- Taking inventory of assets within and outside the school community;
- Visiting schools or other organizations to inform and inspire the design;
- Developing and piloting programmatic components of the school model; and
- Creating an implementation strategy.

For the purposes of this RFP, the term “schools,” refers to diploma-granting entities that offer students integrated, full-time academic and social supports in holistic, integrated learning environments, which are tailored specifically to address students’ comprehensive needs toward achieving college and career success. **Please note that this RFP is not intended to identify or fund stand-alone initiatives or programs** that target only small numbers of students or subsets of the student population – including those that take place within or in partnership with traditional high schools. Instead, the intent is to support existing high schools that are interested in designing a high school model that provides credit-bearing wider learning ecosystem opportunities for all students.

Further, the **RFP is not intended to support the design of school models that train or prepare students for a particular field or career path.** Rather, the intent is to open all post-secondary options to all students, and to ensure that students are supported and prepared to choose their next steps after high school. Wider ecosystem opportunities should help students identify and develop their interests and goals and to increase their authentic engagement in school.

By the end of the planning phase, all planning awardees will create an implementation action plan that includes information such as a description of the rollout strategy (e.g., activities, partners), identification of resources to demonstrate sustainability, a description of what quality implementation will look like, and a definition of student success and how it will be measured. Based on the quality of the design developed and viability of the implementation strategy, Barr may invite a select group of planning awardees to apply for a two-year

implementation grant. We anticipate that successful implementation applicants will launch their expanded, improved, or new models in fall 2018 or fall 2019.

Eligibility

The Barr Foundation seeks to make a substantial investment in the development of innovative high school models to serve New England students. We encourage robust submissions focused on *one or more existing high schools* located in New England that align with the depth of our commitment from applicants who share our student-centered youth development approach to secondary education.

Successful applicants will have identified the primary needs of the local student population and community, and will be poised to access design partners that will fortify efforts to develop models that: lead to a public high school diploma; provide all students with formal, credit-bearing experiences in the wider learning ecosystem; and internalize the tenets of college and career readiness.

The proposed high school(s) that is the focus for the planning phase must currently:

- Serve a student population comprised of at least 50 percent high needs students (i.e., the combination of low income/economically disadvantaged, English language learners, and students with disabilities)
- Be open access; that is, the school(s) does not have a screening or selection process (based on prior academic performance, behavior, etc.) to enroll students
- Be located and serve students in Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and/or Vermont
- Be able to issue a public high school diploma

The following entities are eligible to apply:

- Nonprofits, including national support partners and community-based organizations (CBOs), in active partnership with at least one Local Education Agency (district or charter organization) focused on one or more high schools
- LEAs—on behalf of a single high school or network of high schools—in partnership with an institution of higher education, CBOs, or local employers

Priority will be given to lead applicants who are nonprofit entities such as intermediary, charter, or community-based organizations. However, we encourage all applicants to submit proposals in the interest of generating a variety of innovative proposals. Further, we understand that designing a high school model that transcends the school walls through participation in the wider learning ecosystem is challenging and requires a complex planning process. Therefore, **priority will also be given to applicants who will engage a national or regional expert with a track record of supporting this type of work** during the planning phase.

This RFP is *not* intended to identify or fund discrete, stand-alone interventions or initiatives—including efforts that take place within or in partnership with traditional high schools.

Proposal Support

Prospective applicants are encouraged to engage in the following established opportunities for proposal support:

- **Webinar for Prospective Applicants:** *Tuesday, April 25th, 3:00-3:45 pm*
Tune in to the RFP [webpage](#) to learn more about this opportunity. We strongly encourage questions to be submitted ahead through email at EducationRFP@barrfoundation.org. All questions, including those not answered during the webinar, will be answered via the forthcoming FAQ that will be published on the [RFP webpage](#) after the webinar.
- **Office Hours for Prospective Applicants:**
We will host optional office hours via conference call on the following dates and times for prospective applicants to discuss proposal content or eligibility:

Friday, May 12th from 10:00 am to 12:00 pm
Friday, May 16th from 10:00 am to 12:00 pm
Friday, May 19th from 2:00 pm to 4:00 pm
Thursday, June 1st from 2:00 pm to 4:00 pm
Tuesday, June 6th from 10:00 am to 12:00 pm
Thursday, June 8th from 2:00 pm to 4:00 pm
Monday, June 12th from 10:00 am to 12:00 pm

[Register here](#) to receive an appointment time for the 10-15 minute call, and the conference line number.

All questions related to the RFP should be submitted via email to EducationRFP@barrfoundation.org. Responses to questions will be published via a FAQ that will be located on the [RFP webpage](#) and will be covered during the webinar and office hours.

All RFP materials and updates will be made available on the [RFP webpage](#) on an ongoing basis. We encourage you to sign up for updates and reminders on Barr's website using this [form](#).

Proposal Submission

All applications are due by 4:00 PM EST on Wednesday, June 14, 2017. Applications should include all elements described below under "Proposal Requirements."

Complete applications should be submitted via two means:

- 1) *Online application form*, which will be available for submissions starting on April 25th, 2017. The link for the [online application form](#), AND
- 2) *Email to EducationRFP@barrfoundation.org*, in PDF format.

Proposal Requirements

A. Organization Information

- Organization Name
- Organization Address
- Main Phone
- Main Fax
- Website URL
- Annual Organization Budget
- Organization Tax ID
- Start of Fiscal Year
- Name, title, phone, and email of Chief Executive of your organization
- Name, title, phone, and email of staff person other than the chief executive managing this request (optional)
- Name, title, phone, and email of lead development staff person handling this request (optional)
- Name, position, and email of all school committee members or executive committee members of the board for your organization

B. Proposal Narrative

Applicants are asked to submit a narrative proposal describing the design work they would like to engage in during the planning year(s). In this section applicants should share their organizational capacity, vision, and activities for the planning phase. The maximum length for the Proposal Narrative is 15 pages. Applicants should respond to the following:

1. Overview & Background

- a. Complete the “[Proposed High Schools](#)” chart to provide an overview of the names, locations, and basic data for the high school(s) included in this proposal. (Note: the chart is not included in the 15 page maximum.)
- b. Describe the assets and challenges in the targeted high school(s) and each corresponding community. Include in your response a description of your students, such as their demographics, interests, and needs.
- c. How does each school define and measure student success (e.g., graduation rates, college matriculation rates, college persistence and completion rates)? Provide relevant data and descriptions (for each proposed school site) to illustrate the current results on measures of student success.
- d. What opportunities does the target school(s) *currently* offer students related to options in the wider learning ecosystem such as early college, career exploration and immersion, or anytime-anywhere learning? How many students participate in each type of opportunity? What are the eligibility requirements for participation?

2. Vision

- a. Describe your vision for an innovative high school model that embraces the wider learning ecosystem through the incorporation of early college experiences, career exploration and immersion, and/or anytime-anywhere learning opportunities. Include in the response your ideas for how all high school students could participate in these wider learning ecosystem opportunities.
- b. In what ways, if any, does the vision build upon existing offerings at the targeted high school(s)?
- c. Describe your planning process to date for realizing your vision. Who has been involved and what data have been used to inform the planning?
- d. Describe the challenges you face in implementing your vision, including current policies and requirements, and how this planning grant might assist you in confronting them.
- e. What will success look like five years from now and how will you know if you have achieved it? How will you define student success? Include both quantitative and qualitative student-based measures of success.

3. Partners

- a. Describe the primary *local/community partners* and allies. How will these partnerships help to ensure successful planning and design? How will you ensure your efforts complement each other and advance the work? Do you have existing partnerships to support student engagement in the wider learning ecosystem?
- b. Describe the *national or regional expert(s)* that will support the planning phase. What is their track record of supporting a high school design process or designing wider learning ecosystem options?
- c. What additional partners will you need to engage to support the design of your high school model? How do you plan to build new relationships or deepen existing partnerships to support your vision?

4. Work Plan

- a. Provide an overview of how you will utilize the planning grant to advance your vision. Include the proposed duration of your planning phase (up to two years), and the rationale for your timeframe. Using [this template](#), please provide a detailed work plan that includes your key activities during the phase; timeline and schedule; key people; and anticipated outcomes. (Note: the work plan will not be counted towards the 15-page maximum for the Proposal Narrative.)
- b. Describe your design team. Who will be involved in this project and how? What is their relevant experience? Provide evidence of their commitment to the values and ideas represented in this RFP. Attach resumes of your core team members (Note: resumes will not be counted toward the 15-page maximum for the Proposal Narrative.)
- c. How will you engage various stakeholders (e.g., current/prospective students, families, community members, staff) in your planning and design process?
- d. Are there capacities you need to build to better do this work? How do you plan to build these capacities?

C. Planning/Design Year(s) Outputs & Outcomes

1. List up to five outputs for the planning/design year(s).

- An output is a direct, tangible and measurable product of a project activity often expressed as a number of units delivered. For example: ten design meetings held, three trainings with a technical assistance provider, 200 participants served through a pilot, student data analysis report completed, six schools visited, community asset map created, etc.
2. List up to five outcomes or results of the planning/design work you intend to do.
 - An outcome is the result of project activities, often expressed in terms of changes in behavior, norms, decision-making, knowledge, attitudes, capacities, motivations, skills, or conditions for the individuals, families, households, organizations, or communities.

D. Budget Narrative

Provide a detailed narrative on the use of the up to \$300,000 planning grant using the provided [budget template](#) for up to a two year time period. These funds *cannot* be used for ongoing operating costs of any school or program, nor can they be used on facilities-related expenses. The maximum planning grant amount applies to a single high school site. Applicants may submit a proposal for more than one high school, and accordingly request a corresponding budget exceeding \$300,000 for the planning phase. However, we expect a multiple high school proposal to reflect economies of scale (i.e., the total budget should be less than \$300,000 per high school). For example, if the proposal is focused on planning work in three high schools, the total budget should be substantially less than \$900,000.

E. Organizational Requirements

Please submit the following administrative documents as part of your proposal:

1. Current board list. Include the following information for each board member:
 - Position(s) on the board (officer and committee positions)
 - Occupation and name of employer and affiliation(s)
 - City or town of residence
 - Term end date for each board member
2. Most recent independent audit or account review (as required by law) for the organization, if applicable
3. Organization budget (income and expense) approved by the board for the fiscal year, with the actual-to-budget comparison for the year-to-date
4. Fundraising Information: Provide a list of companies, foundations, and government entities being approached to fund this proposal, including dollar amounts requested and an indication of which sources are committed, pending, or anticipated.
5. Organizational chart
6. Diversity Data Form (template can be found [here](#))
7. 501(c)(3) Determination Letter, if applicable