



**Barr**  
Foundation

**REQUEST FOR PROPOSALS (RFP) FOR COHORT TWO**

# **Engage New England: Doing High School Differently**

**Released October 24, 2017**

**Planning Phase Proposals Due By 4 p.m. EST on Monday, January 22, 2018**

All proposals should be submitted via [the online application form](#).

Any questions related to the RFP should be submitted via email to [EducationRFP@barrfoundation.org](mailto:EducationRFP@barrfoundation.org).

All RFP materials and updates will be made available on the Barr Foundation website at <https://www.barrfoundation.org/education/engage-new-england>.



# About the Barr Foundation

The Barr Foundation’s mission is to invest in human, natural, and cultural 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 \$710 million to charitable causes since 1999.

Under new leadership since 2014, the Foundation defined a [new regional Education Program strategy](#) in 2016. We seek to nurture the development and expansion of new secondary school models across New England. Schools must change because the world students live in has changed and so have the knowledge and skills necessary for success in life.

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

## Engage New England: Doing High School Differently

In 2016, Barr launched *Engage New England*, its first major initiative focused on investing in new school models intentionally designed for students who are off track to graduate, one of New England's most underserved student populations. This initiative is part of Barr's Education Program [regional strategy](#) that focuses on nurturing the development and expansion of secondary school models that prepare all students with the knowledge and skills necessary for success in life. *Engage New England: Doing High School Differently* was designed to provide all New England students with more diverse education opportunities that connect them to greater success in high school and beyond.

In July 2017, Barr introduced the first of three cohorts of grantees under this initiative. The nine grantees in first cohort represent a variety of approaches to advancing greater success for all students. They include concepts for both new schools and the redesign of existing schools. Located in Connecticut, Massachusetts, and Maine, they also represent both urban and rural schools, as well as a combination of district and charter public schools. You can read more about the first cohort grantees on our [website](#).

This RFP is the second of the *Engage New England* initiative and seeks to expand the number of organizations creating new or redesigned school options in partnership with Barr by creating a second cohort of grantees.

### Background

Most of our current schools are not meeting the needs of students off track to high school graduation. They offer few options to students who have not experienced success in traditional settings, and do not provide the supports or the environments required to re-engage them in learning, identify and address their unique needs, or create for them a sense of belonging at school. New research suggests that all of these conditions are necessary for students who have fallen off track for success, if they are to experience real academic achievement and ready themselves for college and career. And a small, but growing cadre of schools and programs that create these conditions – and that are specifically and intentionally designed to address students' academic, social, and developmental needs – are demonstrating that these young people can succeed and thrive.

What such schools have in common is an emphasis on Positive Youth Development as a central organizing principle. These schools fully recognize that young people's ability to achieve academic success is inter-related with their success in achieving key developmental outcomes of social-emotional learning and identity formation. These schools have the structure, teaching strategies, and supports that all intentionally reinforce these goals. They harness young people's interests and focus resources so that students perceive the school and the classroom as places where their concerns can effectively be addressed.

## The Opportunity

This **Request for Proposals (RFP)** is the second released as part of Barr's *Engage New England: Doing High School Differently* initiative, intended to spur innovation across the region toward the planning and implementation of targeted, public, whole-school educational models that meet the needs of high school students who are off track toward graduation. The Barr Foundation seeks to build a critical mass of high-quality schools and programs for New England's students who are off track for high school graduation that will provide them with the necessary supports to succeed in secondary and post-secondary endeavors and to thrive as adults. We believe in the potential of these students and have high expectations for all of them. We also feel an obligation to ensure that they have equitable access to high-quality schools and programs that are designed to help them reach that potential. We believe the success of these students in college, career, and life will have a positive societal and economic impact across the entire New England region.

*Engage New England: Doing High School Differently* focuses on improving secondary outcomes for New England youth who are off track for graduation by supporting, incubating, growing, and promoting promising public high school and program models that address the specific needs of students. We aim to support both existing and new models by providing significant funding, in-depth technical assistance to support planning and implementation, and a shared learning community to help develop, elevate, and improve high-quality secondary options for students off track to graduate in New England. Our goal is to support the creation of schools across the region that can serve as inspirational exemplars for the design and implementation of responsive, flexible, and student-centered schools, intentionally designed to support the needs of young people who are so often left behind by traditional schools. The success of these schools will provide critical insights into how best to meet the varied needs of all students, lessons that we believe will be applicable across the entire landscape of high school programming.

Through this initiative, Barr intends to invest in three cohorts of grantees to go through planning and, potentially, implementation. In addition, we intend to invest in considerable technical assistance to grantees, to foster a community of practice among like-minded professionals invested in our shared beliefs about the importance of these new models, and to make other aligned investments to carry our collective vision forward.

In this second cycle, we anticipate supporting a cohort of up to eight grantees, seeking to seed or grow pioneering whole-school models across New England that can effectively boost graduation rates and college readiness for students who have not found the support they need through traditional education models. This RFP is intended to support only wholly integrated, full-time models, not discrete programs or stand-alone interventions. We utilize the term program to signal our interest in supporting entities regardless of their governance structure; potential applicants that function like a school in all aspects yet are designated as programs are eligible to apply.

Each cycle of the initiative will roll-out in two phases. The first phase, which this RFP addresses, is the planning phase. Applicants are invited to submit proposals for up to \$150,000 for one year of planning. Subsequently, Barr will invite a select group of planning awardees to apply for a two-year implementation grant of up to \$750,000.

In developing this initiative, Barr has partnered with [Springpoint](#), a national nonprofit organization that supports the design and launch of innovative public high schools. Springpoint will provide a variety of supports to all applicants during the proposal development phase, as well as to awardees during the planning year.

Please note the following (estimated) initiative timeline for the first cohort of grantees:

October 24, 2017	RFP released
Late November, 2017	Webinar for prospective applicants
November 29, 2017	Office hours via conference call
December 15, 2017	Office hours via conference call
January 12, 2018	Office hours via conference call
<b>January 22, 2018</b>	<b>Planning phase proposals due</b>
July 2018	1-year long planning phase awards announced
January 2019	Implementation award invitations released
July 2019	2-year long implementation awards announced
Fall 2019	Launch of new, expanded, or improved models

All RFP materials and updates will be made available on the [initiative webpage](#) (<https://www.barrfoundation.org/education/engage-new-england>) on an ongoing basis.



## Context and Theory of Change

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 college completion and successful entrance into the workforce. For far too many young people, however, this crucial foundation is out of reach, as a substantial number of students find frustration and failure in high school, fall off track, and see their chances of graduating diminish. Across the United States, approximately 2.6 million young people ages 16-24 are off track to graduate from high school. Those who fail to earn a high school diploma are nearly twice as likely to be unemployed and live in poverty. A disproportionate number of these students are low-income and minority youth.

This is a nationwide problem that is also deeply affecting the New England region. In Massachusetts alone an estimated 40,000 students in 2012 either failed to graduate in five years, did not connect to post-graduate options, or were in need of remediation despite receiving a high school diploma. These are students who are not positioned to succeed in college and today's workforce; high school has done them a grave disservice.

There is a growing national movement underway in the United States to address the urgent needs of these students by rethinking secondary education. These efforts focus on moving away from traditional high school to more innovative models that place a premium on flexibility and responsiveness, emphasize engagement and experiential learning, and look to students' developmental needs as a framework for the design of the learning environment. Ultimately, these new models are focused on connecting more students to success in high school, college, and career. They are backed by solid research demonstrating that students who fall off track in high school can achieve graduation and post-secondary success when schools specifically target their needs and intentionally support their engagement and growth. For example:

- The June 2016 “Massachusetts High School Graduation Initiative (MassGrad) Final Evaluation Report” found that the Commonwealth’s alternative pathways strategy, which offered “programs or schools that create smaller, more tailored environments to address the specific needs of certain populations of students and provide alternative pathways to a high school diploma,” had the statistically strongest positive outcomes from among seven strategies implemented. Massachusetts students participating in

alternative pathways were most likely to graduate from high school and least likely to drop out of school (as compared to students in all other MassGrad initiative strategies).<sup>1</sup>

- During a 10-year period spanning 2005 to 2015, New York City’s Department of Education (NYC DOE) pursued deliberate strategies focused on re-engaging students aged 16-21 who had fallen off track toward graduation. A range of schools and programs designed explicitly to support students off track to graduate and managed through the NYC DOE’s Office of Multiple Pathways to Graduation contributed to an increase in the average graduation rate of students off track to graduate from 19% to 56%. Graduation rates among the top-performing schools reached as high as 69%.<sup>2</sup>

These successes are based on design elements that intentionally place students’ comprehensive developmental needs at the center of their programming. For example, effective model elements identified in the 2016 MassGrad report include the following:

- Provisioning of socio-emotional supports,
- Building relationships and community,
- Offering flexible schedules,
- Pursuing students’ interests, and
- Enabling career exploration.

These elements reflect a Positive Youth Development approach, which recognizes that young people will always strive to meet their core developmental needs – identity formation and the development of mastery of essential life skills – and that they will engage and thrive in environments that are most aligned with these needs.

For young people who have not found success in traditional school environments, who have not been able to identify what is relevant to them and to their future in such environments and within traditional academic curricula, youth development research makes a convincing case for focusing school and curricular design intentionally on what activates and sustains student engagement in learning.

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.

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<sup>1</sup> UMass Donahue Institute (2016, June). *Massachusetts High School Graduation Initiative (MassGrad) Final Evaluation Report*. <http://www.doe.mass.edu/ccr/massgrad/FinalEvaluation.pdf>

<sup>2</sup> Office of Multiple Pathways to Graduation, The New York City Department of Education (2006, October). *Multiple Pathways Research and Development: Summary Findings and Strategic Solutions For Overage, Under-Credited Youth*. <http://schools.nyc.gov/NR/rdonlyres/B5EC6D1C-F88A-4610-8F0F-A14D63420115/0/FindingsOfOMPG.pdf>

Schools that are successful with students who are off track for high school graduation take a wider view of what it means to be college-ready, placing more emphasis on a full range of capacities that will enable young adults to succeed across varied situations. Academic competency is certainly an essential part of this, but for these more difficult-to-engage students, other forms of mastery must also take center stage: the capacity to form trusting relationships; to set goals and take responsibility for meeting them; to relate to others in varying situations; to have a sense of identity, self-worth, and belonging; and to recognize their responsibility for contributing to the larger good. These are also critical achievements for students, and schools that recognize them as such – explicitly and consistently – will be better equipped to capitalize on youth developmental concerns as the cornerstone of academic success.

Five key tenets of Positive Youth Development theory are especially relevant for the design of effective learning environments for students off track to graduate:

- Youth need caring, trusting, and supportive relationships with adults and other young people.
- Youth respond to high expectations.
- Youth need opportunities to contribute (often referred to as “choice and voice”).
- Youth need learning experiences that are intentionally engaging, related to their authentic interests, which offer opportunities to succeed and provide feedback to enable them to reflect on their accomplishments.
- Youth know what to expect from the environment (i.e., the above four tenets are continuously present).

Schools that focus on rigorous, engaging, and relevant instruction; pacing and assessment that allows students to demonstrate mastery on their own timeline; an environment that facilitates building community and identity; and plentiful opportunities to form relationships with adults and peers will enable students to succeed where more traditional high schools have failed them.

Community-based organizations (CBOs) also play a crucial role in school and program models intentionally designed within a Positive Youth Development framework. Research demonstrates that integrated community-based support services for youth increase the likelihood of school success. This is largely because they provide students with developmental opportunities and social support services that are essential to young people’s overall well-being. CBO partnerships do not represent the entirety of a schools’ youth development focus; they function to extend the Positive Youth Development culture, and to marshal critical resources and expertise to bolster their effectiveness in responding to students’ cognitive, social, emotional, and physical needs. Further, CBOs can be key partners to increase student access for anytime-anywhere learning opportunities aligned to students’ interests and goals. Through strategic partnerships, formal learning does not need to be constrained by the walls of a school building; this results in more flexible, authentic, engaging academic experiences.



# Request for Proposal

## Planning & Design of Schools and Programs for Students who are Off Track to Graduate in New England

The Barr Foundation is seeking proposals for innovative public high schools and programs across New England. Competitive proposals will demonstrate how schools and programs will be designed to support students who are off track to graduate by creating intentionally flexible and responsive environments, which are organized to leverage assets in the surrounding community, and networked to access critical resources for students. Our goal is to support the development of exemplary schools and programs across the region that can powerfully demonstrate the impact of a student-centered, targeted, and supportive approaches that intentionally address both academic and developmental needs of students who are off track toward graduation. Aligned with a Positive Youth Development approach, this RFP is focused on schools and programs that are options of choice, allowing students to freely make informed decisions on whether the education option is the best fit for their interests, needs, and goals.

For the purposes of this RFP, in addition to “schools,” we use the term “programs” to refer to entities that may be situated within a district, but that function like a school in all aspects – i.e., they have dedicated leadership, budget, and staff; they 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. Even if such entities are part of a larger system that designates them as a “program,” with a governance structure that is distinct from that of an individual school (with dedicated leadership, budget, and staff), we still encourage them to apply. **Please note that this RFP is not intended to identify or fund stand-alone interventions or initiatives that target only a single, or small group of issues or elements of student life (e.g. attendance, socio-emotional learning, tutoring) – including those that take place within or in partnership with traditional high schools.**

For the purposes of this RFP, students who are off track to graduate are defined as high school-aged/eligible students who are:

- Enrolled in high school but off track to graduation requirements (defined as 1.5 years or more behind expected progress towards graduation);

- Rising grade nine students who are entering high school 1.5 years or more behind expected progress; and/or
- Disconnected or not enrolled in high school and have not yet earned a high school diploma.

Successful applicants will propose a vision for a public school or program model that embrace a Positive Youth Development approach and intentionally and explicitly include the following essential elements:

- Teaching and learning systems that enable personalized learning
- Prioritization of student agency and engagement
- Strategic partnerships that increase student access to supports and expand opportunities for anytime-anywhere learning in ways that are aligned to student competency development
- Strong student linkages to post-secondary institutions and career opportunities

In addition, Barr has the following set of beliefs that reflect the values we anticipate successful applicants to this RFP will share:

- All students off track to graduate can and must achieve at high levels in order to fully realize their individual potential.
- Students off track to graduate have the right to connect to secondary and post-secondary success.
- It is our collective responsibility to invest in the design and development of new learning models that are diploma- granting, flexible, and responsive to the needs of students.
- New models can be trajectory-changing for students off track to graduate and set them on a path to success by ensuring achievement of a high school diploma.
- New models are necessary in order to fully prepare students for the skills and connections necessary for the successful transition to meaningful post-secondary options.
- Students thrive in schools and programs that embrace a student-centered youth development approach to both design and implementation.

Funding to support the development of innovative schools and programs in support of students off track to graduate will roll-out in two phases. The first phase, which this RFP addresses, is the planning phase. Applicants are invited to submit proposals for up to \$150,000 for one year of planning to support development of their school or program model. Barr has engaged Springpoint, a national nonprofit organization that supports the design, launch, and iteration of innovative public high school models, to be a partner in this initiative.

Applicants who are awarded planning grants will receive supports from Springpoint during the planning year and become part of a learning community. Supports include model design, strategic planning, capacity building, creation of mastery-based systems, and customized tool/

resource development. Please refer to Springpoint's [scope and sequence](#) for the design and planning year to better understand the model design process and the time commitment anticipated to participate in the support activities and in the broader learning community. Awardees will have opportunities and be expected to participate in initiative convenings, multi-day school learning tours, design coaching sessions, model audits, data analysis and sharing, and other customized technical assistance. Springpoint's approach to innovative model design and implementation is both student-centered and grounded in youth development theory. Learn more about Springpoint on their website ([www.springpointschools.org](http://www.springpointschools.org)).

In January 2019, Barr will invite a select group of planning awardees to apply for a two-year implementation grant of up to \$750,000. Applicants invited to apply will continue to receive support from Springpoint. We anticipate that successful implementation applicants will launch their expanded, improved, or new models in fall 2019.

## Eligibility

The Barr Foundation seeks to make a substantial investment in the development of innovative models to serve New England students off track to graduate high school. We encourage robust submissions that align with the depth of our commitment from applicants who share our student-centered youth development approach to secondary education.

Barr invites applications from entities interested in:

- a) Opening new schools or programs.
- b) Improving existing schools or programs.
- c) Growing schools or programs.

Successful applicants will be focused on a school or program that:

- Leads to a public high school diploma,
- Is an option of choice for the participating students,
- Intentionally enrolls high school students off track to graduate, and
- Serves at least 100 students at scale.

Eligible programs are entities within a district that offer students integrated, *full-time* academic and social supports in holistic, integrated learning environments, which are tailored specifically to address their comprehensive needs toward achieving college and career success. These programs should function in all aspects like schools, with dedicated leadership, budget, and staff. This RFP is *not* intended to identify or fund discrete, stand-alone interventions or initiatives – including if such efforts take place within or in partnership with traditional high schools.

The following entities are eligible to apply:

- Local Education Agencies (LEAs), including districts and charter organizations
- Nonprofits, including community-based organizations (CBOs), in active partnership with a LEA or as an entity that can or will be able to support a school or program, as described above

This opportunity is open to entities proposing to serve students in Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, or Vermont.

## Proposal Support

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

- **Webinar for Prospective Applicants:** *Late November, 2017 (date to be announced)*  
Tune in to hear stories of New England's youth, learn more about the goals and plans for the initiative, and share your questions. The [initiative webpage](#) will have information on how to participate.
- **Office Hours for Prospective Applicants:** *November 29, 2017, December 15, 2017 and January 12, 2017*  
We will host optional office hours on three dates for prospective applicants to discuss proposal content or eligibility. [Register here](#) to receive an appointment time and conference line number.
- **Proposal Development Resources:**  
Curated resources are available on a dedicated [resources webpage](#). These resources, including research on serving students off track to graduate, profiles of successful alternative models, school design materials, and guides to understanding youth development theory, can aid in the development of applicants' proposal and vision.

**All questions related to the RFP should be submitted via email to**

[EducationRFP@barrfoundation.org](mailto:EducationRFP@barrfoundation.org). Responses to frequently asked questions are published via a FAQ on our initiative website and may be covered during the webinar and office hours.

All RFP materials and updates will be made available on the [initiative webpage](#) on an ongoing basis. We encourage you to sign up for updates and reminders on the initiative website: <https://www.barrfoundation.org/education/engage-new-england>.

## Proposal Submission

**All applications are due by 4:00 PM EST on Monday, January 22, 2018.** Applications should include all elements described below under "Proposal Requirements."

Complete applications should be submitted via the *online application form*, which can be accessed [here](#).

## Proposal Requirements

### A. Organization and Request Information

- Organization Name
- Organization Address
- Main Phone
- Main Fax
- Website URL
- Annual Organization Budget
- Organization Tax ID
- Organization Fiscal Year
- Amount Requested
- Request Duration in Months
- Amount Requested
- Total Project Budget for Planning Phase (Include Amount Requested)
- 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)

### B. Proposal Narrative

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

1. Vision
  - a. Who are the students you intend to serve? What are their needs? Provide the number of students you intend to serve.
  - b. Describe the context for your planned work. What is the current or proposed location? What are the assets and challenges in the community you intend to work within? Include relevant information about the policy landscape.
  - c. Please describe the need for the planned work. If the school or program is within a school or affiliated with a high school, include in your response the current high school graduation rate.

- d. Describe your vision for developing or improving/growing an innovative school or program to serve students off track to graduate.
- e. What will success look like five years from now and how will you know if you have achieved it? Include both quantitative and qualitative student-based measures of success. What do you hope to learn from this work that will increase your effectiveness/impact?

## 2. Experience & Capacity

- a. Describe your organization, including mission, key goals and strategies, and track record.
- b. Describe your current work to support students off track to graduate in detail. Include in your response a description of who the students are, how they are recruited, and how they are supported.
- c. Describe your planning process to date for realizing your vision. Who has been involved and what data has been used to inform the planning?
- d. We anticipate that the role of the design leader will be especially critical to this work. Often, that person may invest significant time during the year conducting research on student needs, planning the model, organizing and managing the design team, and developing artifacts to enable model launch. Who will lead the design and planning year? Please indicate if this will be an existing staff member or someone that will be hired. How do you plan to use that role? Given the time necessary to do concrete design and to support complexity of the work, how will that person allocate time to this project? How will that person be supported?
- e. Describe the resources beyond this grant that you will bring to this project.
- f. Describe the networks and strategic partnerships you have in place that will enable you to access and leverage resources, both during the design and planning year, and once your model is launched. Do you have existing partnerships that will help to ensure successful recruitment of students? Do you have existing partnership to support and engage students in their high school education? Do you have existing partnerships to support student connections to postsecondary and career opportunities? If you anticipate having key partners participate in design and planning, please describe their roles in detail.
- g. Describe your capacity to reach a variety of stakeholders in the planning phase. How will you engage various stakeholders (e.g., current/prospective students, families, community members, staff) in your planning and design process?

## 3. Support & Technical Assistance

- a. Describe the challenges you face in implementing your vision, and how this planning grant might assist you in confronting them.
- b. Are there capacities you need to build to better do this work? How do you plan to build these capacities?
- c. What supports do you anticipate needing during the planning period to move this work forward? What help could you use?

#### 4. Work Plan

Please complete using the [Work Plan template](#), which will not be counted towards the 15-page maximum for the Proposal Narrative. Please refer to Springpoint's [scope and sequence](#) for the design and planning year to better understand the model design process and the time commitment anticipated to participate in the support activities and in the broader learning community.

1. Describe in detail how you will utilize the planning grant to advance your vision. What are the key activities you will engage in? Use the Work Plan template to provide an overview of your key activities, deliverables, and key people.
2. Use the Action Plan section of the Work Plan template to provide a breakdown of up to five activities from the Work Plan into smaller action plans. Describe the activity, purpose, and rationale. Provide concrete action steps.
3. Use Design Team Composition section of the Work Plan template to describe your team. Who will lead the work of designing and planning? Who else 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.

#### C. **Planning/Design Year Outputs and Outcomes (Please complete using the [Outputs and Outcomes template](#))**

Use the Outputs and Outcomes template to list up to five outputs and five outcomes for the planning/design year.

- An output is a concrete deliverable which your design team plans to produce as part of the work. Outputs should showcase major milestones along the design year and be as specific as possible.
- 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. Strong outcomes represent what your design team is intending to accomplish through the delivery of an output.

#### D. **Budget Narrative (Please complete using the [budget template](#))**

Provide a detailed narrative on the use of the up to \$150,000 planning grant using the provided budget template. These funds *cannot* be used for ongoing operating costs of any school or program, nor can they be used on facilities-related expenses. Please note, if you are including funds for partners in your budget, please describe in detail their role in the work during the design and planning year. Costs associated with learning tours, convenings, coaching, and technical assistance provided and organized by Springpoint will be covered by Springpoint.

## 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/or 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: If applicable, 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 (Please use template found [here](#))
7. 501(c)(3) determination form, if applicable
8. Resumes of design team members
9. Any additional documents to supplement application (optional)

*Please note that due to the large number of requests, we may not be able to provide feedback on proposals to all applicants.*