

Request for Proposal

ADAPTIVE LEARNING MARKET ACCELERATOR PROGRAM

Final Proposal Deadline: April 30th, 2013, 3 PM PT

Email questions to adaptive.learning@gatesfoundation.org

Refer to the [Adaptive Learning Market Accelerator Program Information Site](#) for updates and additional information.

Background

Education is a critical and widely recognized path out of poverty and a fundamental requirement for our nation's continued and future prosperity. The Postsecondary Success team at the Bill & Melinda Gates Foundation is part of a community of higher education institutions, state and federal agencies, not-for-profit organizations, and companies learning and working together to ensure that every student who has the will to get a postsecondary education has a way to obtain one. We seek to help students obtain the credentials they need to be competitive in the workforce, while also advancing the ability for postsecondary institutions to adopt strategies and tools that will improve the quality of the student experience while managing costs. The Bill & Melinda Gates Foundation's Postsecondary Success team has actively supported a range of partners pushing the boundaries of next generation learning and innovation with an overall goal of increasing low income young adult students learning and credential completion through systems and learning environments that harness the design principles of personalized learning. Given the postsecondary education sector's need to increase student success and outcomes in a landscape broadly defined by increasing competition, reduced or diminishing public support, and an increasing focus on completion and quality outcomes, we believe that the smart and evidence-driven application of emerging technologies such as adaptive learning may produce new opportunities for institutions to address some of these challenges.

One of our beliefs is that postsecondary experiences that better personalize learning for students have the potential to deliver better outcomes in terms of mastery and completion (with respect to actual completion rates, time to completion, and the cost of completion). We are inspired by a diverse community of innovators and pioneers both inside and outside of the postsecondary education system assembling new practices and solutions that are tackling the myriad challenges facing the postsecondary community while also producing evidence of outcomes and identifying areas of further investment and refinement. In particular, we are interested in the role of emerging technologies as a tool for helping faculty and administrators better deliver quality blended instruction and feedback to struggling

students. One area we believe technology may play a role is in helping make high-quality, affordable learning content and experiences for the full sequence of high-demand general education and developmental education courses available to all students.

In an emerging marketplace, key terms are often employed loosely by companies and organizations, contributing to a lack of clarity and potentially confusion for institutional decision-makers. To that end, terms like “personalized”, “adaptive”, and “individualized” have become buzzwords in the educational technology and services world, employed frequently – and often interchangeably – to describe a set of solution attributes or product characteristics. For the purposes of this RFP, we define **personalized learning** as a “pedagogical method/process that draws on observation to inform tailored student educational interventions designed to increase the likelihood of learner success.” Based on this definition, personalized learning serves as an umbrella term that may incorporate various pedagogical approaches such as competency-based learning, differentiated instruction, social and peer to peer learning, tutoring, technology-enabled adaptive learning, student success analytics, integrated planning and advising services, and interactive courseware with imbedded assessment.

As described in [Learning to Adapt: The Case for Accelerating Adaptive Learning in Higher Education](#) by Education Growth Advisors, **technology-enabled adaptive learning solutions** represent one instantiation of an approach by faculty at colleges and universities to deploy personalized learning at scale to increase student success. Adaptive learning solutions leverage various strands of academic research in areas such as intelligent tutoring systems, machine learning, knowledge space theory, memory retention, cognitive load theory, and others to deliver learning experiences that are tailored to the needs of individual learners. In adaptive learning, selected teaching and learning activities are “automated” to create efficiencies and rapid insights for both learners and instructors. The result of these efficiencies may include a reduced cost of delivery, improvements to course completion and mastery, and/or the ability to focus their precious time with students developing higher order thinking skills.

As the Education Growth Advisors report indicates, while there is plenty of innovation in the marketplace and a new breed and generation of such solutions, adoption of these innovative approaches remains fragmented and embryonic at best. The recent flurry of organizations promoting personalized and or adaptive learning solutions creates challenges for institutions seeking to discern differences among offerings and obfuscates the appropriate and most valuable application for these types of solutions. Furthermore, while the underlying academic research on which these solutions are based is often supported by real evidence, there is limited evidence supporting the efficacy of the solutions themselves – either in terms of student outcomes or savings generated by greater instructional efficiency.

Early Evidence Supporting Adaptive Learning

Emergent evidence tells us that adaptive learning environments, implemented with fidelity and care, have the potential to yield better outcomes for students. As important, the evidence also points to the possibility that these innovations may assist in constraining instructional costs by unlocking the potential of accelerated course completion. Some examples of this early evidence include:

- **Research on mastery based learning and recent research on intelligent tutors** – Benjamin Bloom’s 2 sigma findings have motivated a generation of education researchers to imagine ways of unlocking such learning gains by replicating the effects of 1:1 tutoring (Bloom, B. 1984. "The 2 Sigma Problem: The Search for Methods of Group Instruction as Effective as One-to-One Tutoring", *Educational Researcher*, 13:6(4-16). More recent research, while critical of Bloom’s conclusions, argues that adaptive and intelligent

tutors are already nearly as effective as 1:1 human tutoring ([VanLehn, K. 2011. The relative effectiveness of human tutoring, intelligent tutoring systems and other tutoring systems. Educational Psychologist, 46, 4, 197-221.](#)).

- **Random control trial (RCT) study with Public Universities by ITHAKA** conducted with six public universities w/ statistically reliable control and treatment groups, found no difference in learning outcomes and student pass rates between students in a traditional introductory statistics course and the blended and face to face groups, with OLI students taking an Open Learning Initiative Statistics course in a blended format. The students in the blended OLI course completed 25% faster – irrespective of the demographic, gender, or Pell eligible status of the students in the control and experimental groups (Bowen, W.G., Chingos, M.M., Lack, K.L., & Nygren, T.I. (2012). [Interactive Learning Online at Public Universities: Evidence from Randomized Trials. ITHAKA](#)).
- **Knewton & ASU partnership** to re-design traditional developmental math courses and gateway general education subjects with emporium and mastery based blended courses powered by the Knewton adaptive learning system. In the pilot developmental Math courses, pass rates increased by 18% and withdrawals dropped by more than 47% -- reducing drops to ~240 and saving ASU an estimated \$12,000,000 in lost tuition (source: [“The New Intelligence” Inside Higher Education, January 25th 2013](#)).
- **Cal State Northridge Gateway Math Redesign** – creation of a more personalized gateway math course via the use of an intelligent math tutor (ALEKS), a re-designed curriculum and pedagogical model, and more personalized and immediate feedback to students produced a 67% increase in Math 103 pass rates amongst their students (source: [CSU Northridge and SRI Report of Cumulative Findings from NGLC Wave 1, 2012](#)).

These examples, by no means exhaustive or representative of the entire field, demonstrate that while many of these adaptive learning solutions are young and emergent, they hold considerable promise in delivering greater mastery and course success for students. While we are cautiously optimistic that adaptive learning solutions may help learners, there is still much the field has yet to learn about adaptive learning, particularly how these solutions serve diverse learners across multiple educational environments and contexts.

Program Objectives

The Bill & Melinda Gates Foundation seeks innovative postsecondary institutions and adaptive learning technology partners to participate in a program to drive robust implementations of adaptive learning, to document and measure the implementation and student outcomes, and to share these findings broadly with the field so as to shed more light on this promising field of learning innovations. This program aims to encourage both rigorous research and acceleration of the adaptive learning marketplace by answering the following questions:

1. For which students, disciplines, courses, and educational contexts is adaptive learning more/less effective?
2. What are the opportunities and challenges faculty and instructors encounter in using and adopting these technology solutions to create and deploy more adaptive courses?
3. Which components in a specific adaptive learning experience drive impact for the average learner and what additional supports may need to be added to support the successful implementation of adaptive learning across blended, online, or face-to-face contexts?
4. What can we learn about the science of learning and human cognition from the adaptive courses and the data generated and analyzed from these courses?
5. Are there specific modalities or ways in which adaptive learning is instituted that yield significant improvements in student outcomes and mastery?
6. Can specific implementations of adaptive learning yield institutional savings or greater instructional efficiency?

7. What are the experiences and reactions of students participating and learning in these adaptive courses?
8. Can adaptive technologies free up instructor time so that faculty can shift from routine lecturing to deeper, more intensive face to face engagements aligned to the needs of individual students?

Clearly, we have much to learn from these types of implementations. We expect that these adaptive learning implementations shed light on a diverse set of innovative tools, the careful and optimal way to deploy these learning innovations, and most importantly, the student and faculty experiences.

Proposed Scope of Work

This RFP seeks applications from faculty and education leaders at U.S. colleges and universities, in partnership with an adaptive learning vendor(s) of their choice. Applicants will partner to design or adopt and deliver an adaptive undergraduate course or courses that undergraduate students will participate in over the span of 3 consecutive semesters or 4 consecutive quarters. The adaptive course should serve a minimum of 500 students by the conclusion of the third term. Courses that are of particular interest for consideration as part of this RFP include low-success, high-enrollment developmental education or gateway/introductory courses in: mathematics; reading, writing, and composition; the Social Sciences, and the Natural and Physical Sciences (e.g., Developmental Mathematics, Introduction to Economics, and Introduction to Biology). Course learning outcomes, content, and structure should align with those of a “typical” course at a U.S. university, i.e. a proposed adaptive Introduction to Biology course should encompass the same learning outcomes as a traditional Introduction to Biology course.

Winning institutions will be provided a grant of \$100,000 to offset implementation challenges and course design with the following two caveats: (i) \$5,000 of grant funds must be used by the institution in ways to surface and share impressions and experiences of the adaptive course from participating students, instructors, and TAs; (ii) at least \$5,000 of the grant funds must be provided back to the relevant department in which the adaptive course is being generated or for the campus-wide center for teaching/learning to support faculty development in innovative teaching practices via the use of advanced technologies. While the foundation will provide research support services to each winning institution, winners will be required to conduct rigorous and detailed research evaluations of the implementation process more generally, and the course outcomes more specifically (See Research Activities below for additional information). Finally, the foundation will also provide support services to enable the creation of detailed case studies of each implementation and all institutions will be required to assist and participate in activities to capture relevant lessons and learning and to document these findings for broad dissemination in timely and agreed upon ways.

What Success Looks Like

A portfolio of up to 10 institution-vendor partnerships developing and successfully deploying adaptive general education or developmental education courses developed by strong faculty members and validated by their corresponding institutions. These courses, while novel in the way that they leverage emerging adaptive learning innovations, must meet the learning standards set by relevant academic departments within each college/university. The outcomes and learning data is captured to enable rigorous measurement of student experiences and outcomes and to provide an understanding of the student and faculty experience within these courses. The data analysis will reveal the potential cost implications for deploying such adaptive learning solutions and may reveal how different students learn.

Program Eligibility and Selection Criteria

Eligibility

The program is eligible to accredited U.S. institutions of higher education implementing an adaptive course using a generally available adaptive learning technology. The application will be based on a specific adaptive course or courses delivered to students. Institutions that have completed the implementation of an adaptive course(s) within the previous 12 months are strongly encouraged to apply as well.

Institutions

U.S. public or private institutions of higher education accredited to offer associate's, bachelor's degrees, or both, are eligible to apply to this program. For-profit institutions are also encouraged to apply and participate, but they will not be eligible for the \$100,000 implementation cost offset grant. While for-profit universities and colleges will not be eligible for the implementation cost offset grant, they will still be provided evaluation and research support and be expected to fully participate in the creation and sharing of detailed case studies and to assist and participate in activities to capture relevant lessons and learning. For all applicants, institutional leadership must approve each application, as indicated by a letter of support by the institution's President or Chief Academic Officer/Provost.

Adaptive Learning Technologies

While there are many educational technology products using terms advertising their ability to 'adapt' or 'personalize' the learning experience, only those products aligned to the definition of adaptive learning technologies as described in Education Growth Advisor's recent two-part [Learning to Adapt: The Case for Accelerating Adaptive Learning in Higher Education](#) are eligible for this program (though it need not be one of the specific vendors identified).

The specific types of adaptive learning solutions that we seek faculty and colleges/universities to partner with in the program should have the following characteristics and abilities:

- Employ cognitive science or learning science based strategies to drive towards better student outcomes and increased mastery
- Provision of a learning experience tailored to the needs of an individual learner based on multiple variables and qualities including, but not limited to, a student's prior knowledge, cognitive ability, pace of learning, motivation, etc.
- Provides multiple means of adaptation to the needs of an individual learner including but not limited to, mastery learning, adaptive spacing, adaptive fading, error-differentiated feedback, metacognitive support, etc.

The adaptive course could be delivered in a purely online or a 'blended' learning model. Based on emerging evidence of pure online vs. hybrid/blended learning experiences we anticipate blended delivery to hold more promise for the needs of the foundation's target population of low-income young adults because of the critical importance of an instructor and the additional supports and attention. In the course, the adaptive solution itself must constitute a major component of the learning experience and be central to the instructional delivery – as such, it cannot be simply deployed as a study aid, lab simulation, or online assessment.

The adaptive technologies used in the course implementation can be provided by a for-profit or a not-for-profit vendor and must be either generally available or in beta release. Custom adaptive software

projects or in-house approaches that have not been adopted and utilized by multiple academic institutions will not be eligible for consideration.

Joint Participation Agreements

Participation in the program will require the active cooperation and efforts of both the institution/faculty delivering the course and an adaptive learning provider provisioning the adaptive learning technology/solution that will also form an important component of the course. Both of these parties must execute and submit a letter of intent or Memoranda of Understanding (MOU) with their proposal outlining their acceptance of the program data disclosure requirements and participant responsibilities. (See the Joint Participation Agreement Guidelines reference document for example terms and conditions to be included in the agreement.) Formal grants will not be awarded until both parties meet these responsibilities.

Program Requirements

Research Activities

To support the program's goal of accelerating the market for adaptive learning technologies in higher education, the winning participants must agree to participate in foundation-funded research activities directed by a foundation-selected research partner. Our goal for the research is to understand the efficacy of the adaptive learning market segment as a whole and not to evaluate individual vendors against each other.

The scope of the research to be conducted during the program requires the following minimum research: (Please see the Adaptive Learning Market Acceleration Program Research Methodology reference document for additional details)

1. Basic description information on the course enrollment for the adaptive course and any comparison groups including all available demographic data (excluding personally identifiable data).
2. Measurement of student engagement or satisfaction. The foundation looks to each institution to describe the manner in which student engagement or satisfaction with the adaptive learning course can be assessed.
3. Faculty opinion and satisfaction. The foundation looks to each institution to describe the manner in which faculty opinion on the development and delivery of the adaptive learning course can be assessed.
4. Measure of course completion. The foundation defines 'completion' as the attainment of credit for the course.
5. Assessment of subject matter learning. The foundation is willing to accept several methods of assessing subject matter learning: (In order of preference)
 - a. Pre-course/post-course assessment of content
 - b. Results from a summative course assessment
 - c. Results from students achieving a 'C' or better for the course.
6. Cost per student and cost per completion as assessed in a modified NCAT evaluation framework. (See the Research Methodology document for additional information.)

For numbers 4-6 in the list above, one of the following research methodologies must be applied to provide a valid basis for comparison: (In order of preference)

- Random assignment to the adaptive learning based section of a class in which other sections are taught the same material by the same teacher using a conventional method. This is considered

the 'gold standard' for this research project and will be strongly preferred in the application selection process.

- Collection of student learning outcomes for students in the same course taught by the same faculty in a parallel or previously delivered section.
- Collection of student learning outcomes for students in the same course, but taught by different faculty in a parallel or previously delivered section.

In addition, the project research partner will be requesting the actual data as well as the mean and standard deviation for all results.

Data will be requested at the end of each of the three semesters in the program. It is expected that the course delivery using the adaptive learning solution will improve over time, so the data resulting from the delivery of the course in the first semester will be considered provisional. Data from the second and third semester delivery of the course will be subject of greater analysis and reporting.

Grantees are encouraged to perform their own research and analysis that goes above and beyond that required by the program.

The foundation-appointed research partner will also work with the institutions to develop and confirm their data collection plans for qualitative data from the course.

Partner colleges may also be asked to participate in other research or technical assistance-oriented activities over the course of the grant.

Data Sharing

All data generated through the program will be analyzed by an independent researcher, published to a broad audience, and presented for dissemination to the broader academic community. Researchers at the participating institution will be encouraged to analyze and publish research in parallel with the foundation-funded evaluation and research partner.

The dissemination of reliable, independent data on outcomes, costs and lessons learned is critical to the overall growth of the market. As such, institutions and vendors are asked to submit a signed Letter of Intent (LOI) or Memorandum of Understanding (MOU) formalizing each party's acceptance of the program's requirements and agreement to share requested data and information as noted in 'Joint Participation Agreements' above. If any pre-existing contract between the parties limits an institution's participation or restricts such sharing of data and information with the foundation, third parties, and potentially the public, the LOI or MOU must indicate that it will be amended prior to any grant award.

Selection Criteria

The course(s) implemented using the selected adaptive technology **should**:

- Leverage faculty with subject matter expertise and documented teaching quality;
- Align learning outcomes, content, and structure with "typical" course offered across the rest of your institution;
- Impact a cumulative minimum of 500 students by the conclusion of the third term.
- An introductory level or 'gateway' developmental education or general education course populated by a high degree of first or second year undergraduate students.
- Be widely accessible to a broad range of learners, including learners who may have a greater distance to travel in their academic proficiency and mastery.

To best allocate the limited grant funds available for the project, the following characteristics will be prioritized:

- Proposals that highlight the role of this work within the broader context of a college or university's strategic commitment to undergraduate student success and support for innovative teaching and learning
- Proposals that reach the largest number of students above the minimum cumulative threshold of 500 students served
- Proposals with the most significant, credible projections for improvement in student mastery, course completion, and cost savings
- Projects whose initial term will be Fall 2013 (as opposed to Winter 2014)
- Creation of adaptive courses in subjects that disproportionately challenge low-income students (i.e. core gateway gen-ed or STEM courses, or those in developmental math, reading, and writing subjects)
- Implementations that highlight rigorous data collection and analysis methodologies
- Proposals that articulate a trusted and genuine partnership between an academic institution and the adaptive learning provider
- Course implementations that include a high degree of integration with other institutional systems – for example, light and seamless integration with existing learning infrastructure (LMS, SIS, Single Sign On /Authentication System, MOOC platform, etc.)
- The maturity and functionality of the adaptive learning provider
- Implementations that have clear pathways to scale or access to scale networks and thereby influence dozens or hundreds of academic institutions across the nation

Application Process

Application Timeline

- March 13, 2013 – RFP released
- March 29, 2013 – 12:00 PM PT; Informational Webinar and Q&A for Institutions and Vendors. See the [Adaptive Learning Market Acceleration Program Information site](#) or the [online RFP application portal](#)) for webinar information
- April 30, 2013 – Completed applications must be fully submitted by 3 PM (Pacific)
- June 2013 – Winners notified

Application Components & Checklist

There are nine components to the application:

- 1) **Project Description:** Provide a one paragraph (max 255 characters) summary of the project, its goals and objectives suitable for public release and or distribution to media.
- 2) **Proposal Narrative** covering the following topics:
 - a. Please describe the adaptive course(s) to be implemented (max 750 words). We recognize that the course that you have in mind may already exist but may also be significantly modified or altered in order to be delivered in a more adaptive mode. The narrative should provide a detailed description of (i) how you intend to deploy adaptive technologies and methodologies in the proposed course(s), (ii) the course design, pedagogical or learning model that informs the course(s), (iii) the specific role of instructors and faculty in delivering instruction and designing the course(s), (iv) the way

in which you will assess student learning and mastery in the course(s), (v) an explanation of how the adaptive course meet or exceeds mastery requirements and learning outcomes for a similar non-adaptive course taught at your institution, (vi) the specific advantages or benefits of partnering with the selected vendor/adaptive learning solution to deliver a high quality learning experience for students, and,(vii) describe the level of integration between the adaptive learning provider and on-campus learning infrastructure necessary deliver the course(s).

- b. Please describe the faculty, instructors, instructional designers, or organization(s) involved in the selection, design or implementation of the adaptive course(s) (max 200 words). Please provide relevant background information on how long the organization has been in operation, its mission and market penetration and any products that are available. Please list the team members, specify the activities each person will be involved in, and include any recognition for leadership in your field. Please tell us why you have confidence that this is the right organization or team to carry this work forward and achieve implementation success in this grant program.
 - c. Short narrative describing a high level work plan with budget that details both the course design and implementation process, including the role played by the adaptive technology solution and provider (max 100 words).
 - d. Please describe how adaptive learning aligns with your institution's strategic plan, and if shown to be successful in the initial implementation, how will the use of such advanced learning solutions be adopted or scaled within your institution (max 100 words).
 - e. Applicants are also requested to provide a 1 page description (with budget estimates) of their evaluation approach and the detailed metrics that they will monitor and track over the course of the project's lifecycle and during the implementation of these courses. The foundation will require all RFP winners to participate in evaluation and expects its grantees to plan and work diligently to evaluate the efficacy of the selected projects in improving intended outcomes related to student success in the course and mastery. The foundation expects winners to participate actively with the field as part of the program's learning community, sharing their implementation strategies and results as these emerge. Applicants are requested to describe their capacity to collect, analyze, and share data with others outside the project, for project evaluation and in support of secondary research projects or more broader dissemination. Please list any limitations you have for sharing data and research.
- 3) Completed **Application Information Sheet** containing information about your institution, adaptive learning technology provider and proposed course or courses.
 - 4) **Project Budget:** Please use the foundation's budget template to account for your use of grant funds, if awarded. The project budget should align with the Budget Narrative (described below).
 - 5) **Budget Narrative:** To help us better understand your projected use of implementation offset grant funds, please complete the budget narrative template, describing in how your institution will use the implementation cost offset grant, if applicable. Please keep in mind and be sure to reflect that \$5,000 of grant funds must be used by the institution in ways to surface and share impressions and experiences of the adaptive course from participating students, instructors, and TAs, and that at least \$5,000 of the grant funds must be provided back to the relevant department in which the adaptive course is being generated, to support faculty development in innovative teaching practices via the use of advanced technologies.
 - 6) **Letter of Support** for the project signed by President and/or Chief Academic Officer, Provost, board resolution, etc., reflecting institutional approval of your application.

- 7) **Letter of Intent or Memorandum of Understanding** between the adaptive learning provider and applying institution that signifies the parties' intent to deliver the adaptive course as proposed and acceptance of the foundation's data sharing and dissemination requirements for this program. (See the Joint Participation Agreement Guidelines for example terms and conditions).
- 8) An **Official Letter** on your university or college's letterhead indicating your institution's tax status.
- 9) Additionally, applicants may provide up to five additional pages of **appendices** that specifically relate to course design and content, such as syllabi, sample assessments, etc.

Application Submission

Using the Application Portal

Start by clicking the application link below. The first time you visit the portal you will need to set up an individual account for your individual application. After you enter the requested information, a temporary password will be emailed to you. Please, return to the portal to personalize your password and complete your account profile.

Application Link: [Adaptive Learning Market Acceleration Program RFP Site](#)

You can save the application and return to it later by logging in any time with your email address and password.

Tips:

- On the Get Started page, check the box that says "Allow the foundation to view my application as I work on it." This option makes it possible for foundation staff to provide assistance if necessary when you are ready to submit your final 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.

Completing the Online Application

Applicants are requested to follow the instructions provided on the online application portal. Please do not hesitate to reach out to us (see below for contact information) if you have any questions or concerns.

The online application portal leverages the following tabs to assist in completing your application:

- The Getting Started tab provides the application instructions and reference documents used to complete the application. As noted above, please check the box that says "Allow the foundation to view my application as I work on it." Several reference documents are also found on this tab, including:
 - A-Adaptive Learning Market Acceleration Program RFP
 - B-Joint Participation Agreement Guidelines
 - C-Adaptive Learning Market Acceleration Program Research Methodology
 - D-Indirect Cost Policy
- The Describe Project tab collects basic information about your proposal. Please provide the requested information:

- **Project Title** – Provide a short title for your proposal, including the institution and technology vendor name.
- **Project Description** – Provide a one paragraph (max 255 characters) summary of the project, its goals and objectives suitable for public release and or distribution to media.
- **Project Duration** – Please enter the expected duration of the project from the scheduled grant award through the end of data analysis.
- **Project Amount** – If your institution is eligible for the implementation offset cost grant, please enter \$100,000.
- **Referred by** – Please enter the name of the Gates Program Officer responsible for this program, ‘Rahim Rajan.’
- The Add Contacts tab allows you add the contact name for the individual at your institution responsible for signing the grant agreement, if awarded.
- The Upload Files tab houses the templates used to complete your application and provides the ability to upload them to the foundation. The application process requires the completion of the following documents:
 - 1-Application Information Worksheet (template provided)
 - 2-Proposal Narrative (template provided)
 - 3-President Letter of Support (template provided)
 - 4-Short Form Budget Template (template provided)
 - 5-Budget Narrative (template provided)
 - 6-Fully Executed LOI or MOU (no template provided, but reference the Joint Participation Agreement Guidelines found on the Getting Started tab when completing this document.)
 - 7-Letterhead with Tax Status (no template provided)
 - 8-(Optional) Course Description of up to 5 pages (no template provided)

Questions & Additional Help

We encourage you to reach out if you have any questions related to the documents or our proposal process. Don't hesitate to contact us at adaptive.learning@gatesfoundation.org. Please be aware that your question and the response may be included in an anonymized question & answer log made available to all applicants.

Application Selection & Award Process

Application Review and Selection

After the deadline, foundation staff will screen submissions to address whether each proposal addresses the key criteria described in the RFP and whether or not the application fulfills our requirements. A panel made up of foundation and/or external reviewers will also review all the proposals and select successful implementation candidates based on the specific selection criteria described in this document. The foundation intends to select up to 10 institutions for inclusion in the adaptive learning accelerator program. Applications that do not sufficiently meet the foundation's specific criteria and organizations selected for investment will be notified in June, 2013. This process may change—for instance, due to unexpectedly large response to this RFP. Any updates to it will be published in the FAQ section of the RFP page on www.gatesfoundation.org.

Execution of Grant Terms and Conditions

All grant awards will be contingent on execution of a definitive grant agreement.

Intent and Disclaimer

This RFP is made with the intent to identify organizations to build solutions as described in this RFP. The foundation will rely on an organization's representations and consider them to be truthful as described.

The foundation assumes it can be confident in an applicant's ability to deliver the activities described in this RFP. The responses will be incorporated into a future grant agreement should the foundation wish to support the proposal submitted by the applicant.

This RFP is not an offer to enter into a funding agreement. The foundation assumes no responsibility for your cost to respond to this RFP. Until a written funding agreement is fully executed, the foundation will have no obligations to any applicant.

The foundation has put in place policies and procedures to restrict public dissemination of grant application materials including, when possible, having external reviewers sign confidentiality agreements and requiring that reviewers destroy or return to the foundation all copies of information acquired or created during the course of performing a review. In some instances, we are unable to put in place confidentiality agreements or to police the use of grant application materials.

As a general policy, the foundation does not publicly disseminate or "publish" proposals or supporting information related to grant applications. For IRS compliance reasons, we are required to publish a list of grants that we have made. We also provide a general description of the grant on our web sites including www.gatesfoundation.org. These brief descriptions are also made available in press releases and other marketing materials.