Request for Proposal

Increasing the Impact of Integrated Planning and Advising Services (IPAS) That Help Students Get—and Stay—on Track

Final proposal due: June 17, 2015, 5:00 p.m. (PT)

EDUCAUSE Contacts

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Overview

Project Objectives: Increasing the Impact of Integrated Planning and Advising Services

Current challenges facing higher education require that institutions decrease costs while delivering high-quality education to an expanded and more diverse student body. This reality demands that public higher education embrace new models for monitoring and improving student performance. When fully realized at a college or university, integrated planning and advising services (IPAS) encompass an institution-wide commitment to student success and degree completion and are accompanied by coordinated business processes to inform and prompt advising activities.¹

We believe the power of IPAS and other technology-mediated reforms lies in their ability to spur transformative change, rather than merely promote efficiency. IPAS and other large-scale reforms need to change how students experience college in order to improve the likelihood that they will remain engaged, increase their learning, and ultimately graduate. Research shows that small changes are unlikely to improve student experiences substantially and for enough students to move the needle on completion rates. Instead, institution-wide change is needed that trickles down to the students themselves.

We define transformative change as organizational growth and development that combines structural, process, and attitudinal change. Structural changes lay the framework for new behaviors, thereby encouraging improved student experiences throughout the institution. For example, using IPAS technology to enable one-on-one student-advisor meetings sets the stage for more meaningful advising conversations. The content of those conversations can then encourage students to engage in purposeful behavior, problem solve and, presumably, persist and graduate. Process change reforms how people do their jobs at an individual level: it therefore requires supportive structures to ensure it occurs among enough college personnel to change experiences for large numbers of students. Transformative change takes root when attitudinal change occurs—when individuals start to understand their work and view work processes in new ways. While some universities are making great strides, many are procuring IPAS technologies ahead of institutional readiness.

Postsecondary institutions face significant barriers to implementing next-generation IPAS solutions. These barriers include a lack of coordination of the advising services provided to students, an institutional culture in which the potential use of data in advising is not recognized, advising staff who have not been trained in the use of technology in their work, and the costs of new technology, along with the organizational capacity to manage its implementation. To overcome these barriers, EDUCAUSE will use project funding to provide three years of financial, technical, and change management support to selected colleges and universities as

¹ IPAS leverage technology to enhance and streamline course advising, course selection, course registration, tracking of student progress, and targeting of support services in order to improve student academic decision making as well as institutional strategies to help students stay on track to degree attainment.
they implement new IPAS focused on student success. The results of the program will be shared broadly with the field in the hopes of accelerating adoption of IPAS systems in support of student success.

EDUCAUSE, with the support of the Bill & Melinda Gates Foundation and the Leona M. and Harry B. Helmsley Charitable Trust (the Helmsley Trust) and in partnership with Achieving the Dream (ATD), is seeking two- and four-year college and university partners to increase the impact of IPAS aimed at improving students’ progress into and through postsecondary education. We are seeking up to 24 postsecondary institutions that are currently pursuing IPAS solutions (i.e., that have launched components of the system and can deploy comprehensive solutions after a supported year of planning and piloting) to participate in a project that will adapt and use new technologies to enable staff, faculty, and administrators to improve advising. The project will also examine IPAS practices, including business process reengineering, implementation challenges, and early outcomes. What we learn during the project about improving advising will be shared in real time with the broader community of institutions and vendors to accelerate the evolution of the IPAS market and increase its impact.

Participation in the project for each institution includes:

- Recognition as a higher education institution in the delivery of technology enabled advising services
- A grant of up to $225,000 over three years to offset some of the project management and data capture expenses of the IPAS implementation
- Connection to other leading postsecondary institutions in the grantee network and to technology vendors to serve as potential sources of shared learning and information exchange
- Access to technology integration and business process redesign consultants
- Rigorous third-party analysis of student outcomes and return on investment

The first section of this RFP outlines the scope of work for all applicants. It also provides information about a grant opportunity specific to Achieving the Dream Leader Colleges that will support IPAS for students in science, technology, engineering, and mathematics (STEM) pathways. This section also includes definitions of success and information about the financial awards and duration of the project. The section on eligibility describes priority areas of the project partners, expectations for evaluation and data collection, information for vendors and eligible colleges and universities, and a STEM definition. The response guidelines section includes the application checklist as well as instructions for submitting proposals. The Selection Criteria section details how proposals will be evaluated. The final section outlines a timetable of next steps.

Proposed Scope of Work

EDUCAUSE and the project partners are seeking postsecondary institutions to improve advising practices through the implementation of next-generation IPAS systems over the course of three years. We wish to demonstrate, via this challenge, that student outcomes, especially for those
most underserved, and institutional productivity (i.e., individual learner course mastery and completion, time to degree, retention, and cost per completion) can be enhanced and improved via the broad adoption and implementation of an integrated approach to planning and advising. We are interested in institutions that have already begun to implement such approaches and made progress at improving student retention, progression and graduation rates at their institution. Selected colleges and universities will expand their work with an IPAS provider of their choosing to prepare for rollout during a one-year period beginning in mid-2015. The IPAS system will be implemented with support from EDUCAUSE, Achieving the Dream, vendors, consultants, and philanthropic partners over the 2016–17 and 2017–18 academic years. The project partners expect that, by the end of the grant period, grantee colleges and universities will have implemented their new IPAS systems such that external support is no longer necessary to continue system use.

Grantee institutions are expected to have rolled out at least part of their IPAS system(s) prior to applying for grant funding and will be focused on deploying all of the following three broad, student-facing functions:

- **Education planning**: IPAS that improve on current technology and services intended to guide students to select courses and programs of study that are most efficient and relevant to completing a degree or credential that meets their academic and career goals
- **Counseling and coaching**: IPAS that improve on current technology and services to include features connecting students to on- and off-campus resources and allow students and advisors to monitor progress, provide ongoing feedback, and create personalized action plans for educational success
- **Targeting risk and intervention**: IPAS that improve on current technology and services, affording faculty, advisors, students, and administrators the ability to better predict course failure and program stop-out, in order to support timely and effective interventions

Preference will be given to institutions proposing to pursue all three of these functions.

We believe that students learn best when education is personalized to their needs and goals. Our partners are exploring how all students—not just those who are able to attend the most elite, expensive colleges—can get the best, most personalized education at a reasonable price, using integrated and advanced technologies combined with outstanding teaching and student advising. All approaches to IPAS will be deployed in a manner that assures each student at the institution engages in behaviors correlated with college success, including these: attending class, interacting with peers, completing assignments, visiting faculty members in office hours, seeking assistance, participating in on-campus extracurricular activities, and re-enrolling each term, full time if possible.

In addition, each applicant commits to harnessing the power of analytics and data from a scaled implementation that empowers true continuous improvement and refinement of the learning experience. With directed and focused investments towards such a goal, we believe the field may make significant progress in achieving improved student outcomes particularly for low
income and disadvantaged learners who face the most challenges in completing their credentials.

The project partners have identified vendors whose IPAS systems provide at least one of these functions and who are willing to partner with participating colleges and universities to implement their systems. These vendor partners have agreed to work with institutions individually to develop the most effective approach for enhancing advising practices through implementing IPAS systems, collaboratively identifying variables with strong predictive value for monitoring student success, and, in some instances, offering discounted pricing to colleges and universities participating in the project. A list of potential project IPAS vendors will be provided to those awarded grants, although institutions should feel free to partner with any vendor they feel will best address their technology needs.

We believe that truly novel and groundbreaking innovations are often the result of dynamic and imaginative teams working across functions and disciplines. The application of existing concepts and strategies in new domains can produce experiences and outcomes beyond what has previously been developed. To that end, we recommend that colleges and universities invited to apply to this challenge program assemble and propose a ‘dream team’ of institutional leaders, advising technology providers, experts and expertise in pursuit of exemplary IPAS implementations.

We believe that funding institutional teams with some pre-existing experience and solutions with market penetration will minimize the risk of failure and allow us to concentrate risk in diverse organizational capacities and approaches. It will also allow us to build a strong cohort of institutions and for- and non-profit entrepreneurs focused on a common problem set, evaluated by common metrics, and supported by the range of monetary and non-monetary resources. Winning applicants will be asked to submit a MOU or collaboration agreement with their technology and other principal partners as an early milestone in the projects selected for funding.

The project partners have structured the application process to bring forward the voices of critical stakeholders key to the success of IPAS implementation and seek to identify colleges and universities that can demonstrate a commitment to effectively and meaningfully involve staff from multiple departments (including academic advising, IT, and institutional research as well as faculty and students) in the IPAS rollout and implementation process.

Selected institutions also will commit to participating in a funded research study aimed at documenting and understanding the IPAS implementation experience. Colleges and universities must be willing to allow partner researchers access to college personnel and staff during site visits and must also be willing to provide data on outcomes indicators identified by the partners or external evaluators. Partner institutions will additionally be asked to participate in other research or technical assistance-oriented activities over the course of the grant. (See Evaluation and Data Collection below.)

**STEM-Focused Grant Opportunity (for active ATD Leader Colleges)**

In a complex science, technology, engineering, and technology landscape, one component of the STEM challenge has received far less attention until recently: the critical role of the nation’s
community colleges in preparing young and adult students to enter and succeed in middle-skill STEM careers. A growing body of research has identified important reasons to elevate the focus on supporting students on STEM pathways.

- STEM jobs represent 20 percent of all jobs in the United States, contributing to the nation’s well-being as a significant portion of our employment, economy, and cutting-edge advances.
- A Brookings Institution analysis has shown that half of all STEM jobs are available to workers with sub-baccalaureate credentials, meaning that community college students are a primary source for filling these critical jobs.
- Middle-skill STEM jobs represent a huge opportunity for our nation’s historically underserved students, who disproportionately enroll at community colleges and are underrepresented in STEM pathways and jobs.
- Since Achieving the Dream launched the completion movement in 2004, experimentation and research have led to the consensus that students need more guidance and structure.

The convergence of this evidence leads to the unmistakable conclusion that community colleges can be a launching pad for many more individuals to high-paying, quality careers in STEM and an effective avenue for improving equity. To that end, the Helmsley Trust is sponsoring a STEM-focused track in the IPAS2 grant that will be open to active ATD Leader Colleges. Through this grant opportunity, the Helmsley Trust and Achieving the Dream will conduct a deep analysis of which combinations of technology and advising interventions improve success rates for community college students on STEM pathways.

During the grant period, colleges will increase efficiencies and work in a more coordinated fashion to provide adequate outreach to students on STEM pathways. We anticipate an increase of student persistence and completion in STEM pathways in participating community colleges due to the student success interventions that colleges will put in place, particularly for first-time or low-income students and/or students of color. The desired impact of this project is to increase the number of STEM graduates in the workforce to meet local and regional workforce needs.

Selected colleges will choose and work with an IPAS provider(s) during a year of planning and piloting of systems (summer 2015 to summer 2016) to prepare for institution-wide rollout in fall 2016. The IPAS system will be implemented, with support from vendors, Achieving the Dream, and EDUCAUSE. Colleges will implement the technology and participate in a third-party evaluation of the project that will conclude by July 2018. By the end of the grant period, grantee colleges are expected to have implemented their new IPAS systems such that external support is no longer necessary for continued use.

In addition to completing all other components of the RFP as listed below, applicants for the STEM-focused opportunity will address additional questions, included in the
Appendix.

What Success Looks Like

We envision a portfolio of high performing postsecondary institutions successfully deploying a redesigned approach to advising coordinated with IPAS technologies and enabling a quarter of a million low income and disadvantaged learners to experience improved educational outcomes. The implementation of IPAS solutions inspired by this challenge should be capable of improving student learning outcomes and academic progression for the majority of undergraduate learners, particularly the students we seek to serve, while also positively impacting institutional productivity (i.e., individual course completion, time to degree, retention, and cost per completion). These IPAS implementations will surpass what’s currently been accomplished by other institutions and vendor partners in terms of: the structure and clarity it brings to students; the attractiveness of dashboards that visually represent information to students and to faculty and advisers; the elimination of data silos and the integration of accurate and timely data across an institution to coordinate the functioning of various systems including degree audit/progress tracking, course recommendations, and advising management; the identification and alerting of at risk students and delivery of appropriate interventions to keep them on track; and the coordination of various services to eliminate inefficiencies; all to establish a new benchmark of excellence in usability, design, and efficacy in learning technologies. The outcomes and progression data from the deployment of IPAS will be captured and rigorously evaluated by independent, third party researchers to measure student retention, progression and completion as well as to provide a better understanding of the student, faculty and adviser experience using the system. We aspire to see at least a 10% improvement in student retention among participating institutions over the term of the grant. Research and analysis may also reveal the potential productivity implications for institutions that deploy IPAS and evaluate how variable and diverse populations of learners, particularly those disadvantaged and low-income learners, achieve success in these learning experiences.

Funds and Duration

The project duration is August 3, 2015, through August 4, 2018. Institutions that are selected through the RFP will participate in an effort to increase impact that includes the following components:

- Support for up to 24 exemplary implementations of IPAS technology (up to $225,000 over three years per project)
- Development of ongoing collaboration and shared commitment to advising improvement among all stakeholders at each institution
- Development of closer relationships among the institutions implementing IPAS, as well as between these institutions and IPAS vendors
- Provision of a series of implementation supports to aid institutions, vendors, and the field
- Accelerated flow of useful information to drive rapid adoption by selected institutions and subsequent waves of adopters
Selected sites will be required to participate in sponsored technical assistance activities throughout the duration of the grant, including formative evaluation feedback, access to vendor assistance, and broader process reengineering support. Institutions will also be required to attend (using grant dollars to support travel, if needed) three network-wide convenings, held in conjunction with EDUCAUSE or Achieving the Dream annual conferences.

**Eligibility**

**Priority Areas**
The project partners have prioritized IPAS systems that address three key student-facing needs:

- Education planning
- Counseling and coaching
- Risk targeting and intervention

Colleges and universities must be advanced in the implementation of technology that helps them meet these needs. Though there are IPAS systems available that address other needs (such as transfer and articulation), this project is targeting IPAS implementations focused on the above three areas.

Preference will be given to applicants attempting to implement an IPAS that addresses all three areas.

**Evaluation and Data Collection**
The project partners view evaluation as a key element in supporting successful implementation not only for examining outcomes but also for providing a framework for continuous improvement. Therefore, selected institutions agree to participate in research activities conducted by the selected research partner. This mixed-methods research will be used to provide timely feedback to college sites and vendors about implementation progress and to generate information about early changes in institutional and student outcomes. The materials generated through the evaluation process will be analyzed by an independent researcher, published to a broad audience, and presented to the press for dissemination to and engagement of a broader set of vendors and institutions. It is hoped that these efforts will accelerate development of and strengthen the market for IPAS tools designed to improve educational outcomes for low-income college students.

The Bill & Melinda Gates Foundation’s research partner’s activities will involve two to three surveys of college personnel, faculty, and students. These surveys will be supplemented with telephone interviews or site visits to collect more detailed information from a subset of stakeholders. College sites are expected to assist the researchers by coordinating survey administration and visits, helping with logistics, and ensuring that relevant staff and students are provided with time for participation in research activities.

In addition, colleges and universities will be expected to provide institutional data on a common set of metrics which will include indicators for enrollment, progression and cost, disaggregated
by key student characteristics to identify differential impacts on target student populations such as low income, minority, and remedial need. Measures of institutional efficiency will also be included in the outcomes to be monitored. Institutional research staff at the institutions will be expected to provide these data to the research partner three to four times during the course of the grant. Significant funding for institutional research activities conducted as part of this grant should be included as part of the college’s proposed budget.

Vendors

IPAS technology vendors are important partners in the success of this effort. Participating vendors agree to constructively analyze the implementation challenges that colleges and universities face and identify opportunities for improving institutional effectiveness in the use of IPAS applications. They will improve the functionality of their products based on information collected during the project, streamline the use of their technology applications, and enhance the benefits that students and institutions derive from them. By engaging in the project, vendors commit to a thought partnership with participating institutions, other vendors, EDUCAUSE, the Gates Foundation, the Helmsley Trust, Achieving the Dream, and the researchers focused on the design of products that satisfy customer needs and that can be sold into a market of institutions that enjoy and value their services.

Eligible Institutions

Invited U.S. public or private nonprofit institutions of higher education accredited to offer associate’s or bachelor’s degrees, or both, are eligible. Institutional leadership must approve the application, as indicated by a letter of support by the institution’s president. Applicants for the STEM-focused challenge must be Leader Colleges of Achieving the Dream.

STEM Definition

For the purposes of this initiative, STEM disciplines include programs classified by the Institute of Education Sciences (IES) as agriculture and related sciences, natural resources and conservation, communications technologies/technicians, computer and information sciences and support services, engineering, engineering technologies, biological and biomedical sciences, mathematics and statistics, physical sciences, science technologies/technicians, mechanic and repair technologies, and precision production, as well as health programs that lead to professions classified by the Bureau of Labor Statistics as 29-0000 Healthcare Practitioners and Technical Occupations. Programs that lead to professions classified as 31-0000 Healthcare Support Occupations are not eligible at this time.

Please see this [IES website](http://www.ies.ed.gov) for CIP (classification of instructional programs) code details. The following CIP codes are eligible: 01, 03, 10, 11, 14, 15, 26, 27, 40, 41, 47, 48, and 51 (except for subcodes 51.06–51.08, 51.18, 51.26, 51.33–51.37, and 51.39). For more information on the rationale for eligibility within healthcare, see the [Center on Education and the Workforce](http://www.eddatacenter.org).
**Intent and Disclaimer**

This intent of this RFP is to identify institutions capable of completing the project scope as described herein. EDUCAUSE will rely on an institution’s representation and consider it to be truthful as described. EDUCAUSE 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 funding agreement, should the selection committee wish to support the activities proposed by the participant.

This RFP is not an offer to enter into a funding agreement. EDUCAUSE assumes no responsibility for the recipient’s costs incurred to respond to this RFP. Until a written agreement is fully executed, EDUCAUSE will have no obligations to any recipient.

**Response Guidelines**

Because the project partners view IPAS implementation as a collaborative, cross-institutional activity, completion of the RFP will require responses from multiple departmental representatives. The body of the proposal will consist of three short narratives, which should be drafted by staff from the following departments:

1. The provost or chief academic officer (the senior individual responsible for the academic affairs of the institution), in partnership with the senior student services administrator (dean or vice president)
2. The chief information officer (or the individual who, under whatever title, is the senior person responsible for the information technology at the institution)
3. The institutional research department

The lead department (provost/chief academic officer) will collaborate closely with the senior officer responsible for academic advising to complete Narrative 1 and will also serve as the primary point of contact for the institution for purposes of this proposal.

**Additional STEM Challenge Narrative**

Achieving the Dream Leader Colleges wishing to be considered for the STEM challenge funded by the Helmsley Trust will additionally complete a
Additional STEM Challenge Narrative focusing specifically on vision and goals for STEM advising, current supports for STEM students, and ways in which IPAS can address areas of need.

Additional required supporting materials are noted below.

**Applicant Support**

Applicants will wish to consult the tools and materials available on the [IPAS2 site](#) when preparing applications. These resources are included:

- From Tyton Partners, which has interviewed over 40 vendors and institutions active in the market for planning and advising to uncover the factors that contribute to successful projects, the IPAS Institutional Self-Assessment Survey, a short set of questions designed to assess institutional readiness,

- From the Community College Research Center at Columbia University, which worked directly with the first round IPAS institutions, a guide to evaluating an institution’s readiness for technology adoption as well as a tool to use in that evaluation, and

- From the EDUCAUSE Center for Analysis and Research (ECAR), which prepared materials based on first-round IPAS institutions’ work, an IPAS implementation handbook, a data systems and integration report, and a benchmarking study.

Institutions invited to respond to this RFP are also invited to participate in an informational webinar on this opportunity on **May 19 at 4:00 p.m. (ET)**: [convert to your time zone here](#). Join the webinar at this time by selecting “Enter as Guest” and typing in your name and institutional affiliation. Questions will be answered via chat during the webinar.

All communication and questions relating to the RFP content, including requests for clarification, should be submitted to Nancy Millichap. Questions specifically about the use of the applicant portal should be submitted to Silke Koester.
## Application Checklist

<table>
<thead>
<tr>
<th>Item</th>
<th>Purpose</th>
<th>Location</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>RFP document</td>
<td>Invite applicants to participate in the increasing impact project</td>
<td>EDUCAUSE website</td>
</tr>
<tr>
<td>B</td>
<td>Indirect cost policy</td>
<td>Provide guidance about the indirect cost policy of the Bill &amp; Melinda Gates Foundation</td>
<td>Application portal</td>
</tr>
<tr>
<td>C</td>
<td>Budget instructions</td>
<td>Provide information and guidance for preparing the budget spreadsheet and the budget narrative</td>
<td>Application portal</td>
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<tr>
<th>Item</th>
<th>Purpose</th>
<th>Location</th>
<th>To Be Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>IPAS2 Grant Application Page 1</td>
<td>To collect information about the applying institution.</td>
<td>Lead applicant</td>
</tr>
<tr>
<td>2</td>
<td>IPAS2 Proposal</td>
<td>To collect the information and materials which constitute the proposal.</td>
<td>Lead applicant</td>
</tr>
<tr>
<td>a)</td>
<td>Information on Key Contacts</td>
<td>To capture contact information and backgrounds for key project partners who will lead the work and take part in the project convenings.</td>
<td>Lead applicant</td>
</tr>
<tr>
<td>b)</td>
<td>Letter of support from the president</td>
<td>To assure institutional leadership supports the college's participation in the project.</td>
<td>Institution's president, for upload by lead applicant</td>
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<tr>
<td>c)</td>
<td>Budget spreadsheet</td>
<td>Capture broad budget and spending categories for the work.</td>
<td>Lead applicant with finance officer</td>
</tr>
<tr>
<td>d)</td>
<td>Budget narrative</td>
<td>Explain the information in the spreadsheet, as necessary.</td>
<td>Lead applicant with finance officer</td>
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<tr>
<td>e)</td>
<td>Narrative 1</td>
<td>To collect the role, responsibilities and resources required for success and information about the IPAS system that will be implemented; maximum of four pages</td>
<td>The lead departments (joint effort between provost/chief academic officer and student advising)</td>
</tr>
<tr>
<td>f)</td>
<td>Narrative 2</td>
<td>To collect information about department roles in the implementation project; maximum of two pages</td>
<td>IT department</td>
</tr>
<tr>
<td>g)</td>
<td>Narrative 3</td>
<td>To collect information about department roles in the implementation project; maximum of two pages</td>
<td>Institutional research department</td>
</tr>
<tr>
<td>h)</td>
<td>(STEM only) STEM narrative</td>
<td>To collect information about the institution's vision for promoting</td>
<td>Lead applicant or designee</td>
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Response Delivery Instructions

- The RFP response documents should be organized and delivered via the applicant portal.
- Click the [Apply here](#) link in the box (please create just one account for your institution) and follow the directions on the applicant portal. Instructions are embedded within the application, and a budget form, instructions for budget preparation, and the indirect cost policy can be downloaded from the portal.
- All sections, questions, and document uploads must be completed in order for an applicant to be considered for this project.
- All responses should be single spaced in Times New Roman 12-point font, with a 1” margin (top, bottom, and sides). Narratives and support letter may be provided in Microsoft Word or Adobe PDF.
- Questions relating to the content of the RFP, including clarifications and questions, should be submitted to Nancy Millichap.
- Questions or issues relating to access or usage of the applicant portal should be directed to Silke Koester.

Selection Criteria

Proposal responses will be evaluated against the following criteria:

- Well-developed plans and existing organizational procedures and systems that guide students through college and an improving track record of increased retention and degree completion rates;
- Evidence of cross-departmental coordination and experience at reforming work processes in order to improve student outcomes;
- Strength of the technology infrastructure within the institution, including the maturity of the IT system, experience using IPAS systems—capacity for combining learning management systems, student information systems, advising systems, and behavioral data sources—and system capacity (e.g., bandwidth, hardware);
- Institutional motivation for adopting a new IPAS (or other technology), including the degree to which there is a perceived need for the reform across constituent groups and their respective openness to new technology;
- Highly functioning institutional culture, including the clarity of its mission, effectiveness of its decision-making processes, and communication practices.
• Ability of the institution to implement the process of adopting the new technology, including plans for ensuring successful end-user training in and implementation of IPAS technology across the entire institution (i.e., at “enterprise scale”);

• Provision of a coherent work plan to implement the proposed system in a high-quality fashion within the project’s timetable; and

• A clear vision for student advising reform, aligned across departments, that demonstrates the potential to efficiently and effectively reach the entire student body of the institution within 1-2 years and drive improvement in student retention.

**Timetable**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event/Details</th>
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<tbody>
<tr>
<td>May 13, 2015</td>
<td>RFP released</td>
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<tr>
<td>May 19, 2015</td>
<td>4:00 p.m. (ET)</td>
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<tr>
<td>June 17, 2015</td>
<td>5:00 p.m. (PT)</td>
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<tr>
<td>July 10, 2015</td>
<td>Up to 20 grantees and up to 4 STEM grantees selected</td>
</tr>
<tr>
<td>August 3, 2015</td>
<td>Grants announced; project start date</td>
</tr>
<tr>
<td>August 3, 2016</td>
<td>First year (beta testing and piloting) concludes</td>
</tr>
<tr>
<td>September 6, 2016</td>
<td>IPAS systems operational</td>
</tr>
<tr>
<td>August 4, 2018</td>
<td>End of project</td>
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</table>
Appendix

Narratives must be completed by all applicants of the RFP.

Successful proposals will include three separate narrative responses, each of which the lead applicant or his/her representative will upload into this portal at the appropriate position:

- **Narrative 1: Academic Affairs and Student Advising**
  This narrative is to be completed by the provost or chief academic officer (the senior individual responsible for the academic affairs of the institution), in partnership with the senior student services administrator (dean or vice president).

- **Narrative 2: Information Technology**
  This narrative is to be completed by the chief information officer (or the individual who, under whatever title, is the senior person responsible for the information technology at the institution).

- **Narrative 3: Institutional Research**
  This narrative is to be completed by the officer who leads institutional research at the institution.

*Note:* ATD Leader Colleges wishing to be considered for the STEM challenge funded by the Helmsley Trust will additionally complete a fourth narrative focusing specifically on this challenge; these questions appear below the first three narratives.
Narrative 1

To be completed by the provost or chief academic officer (the senior individual responsible for the academic affairs of the institution), in partnership with the senior student services administrator (dean or vice president). Narrative 1 should be a Microsoft Word or Adobe PDF document of no more than four single-spaced pages.

1. Why are you seeking support for an IPAS project? What needs does IPAS address, and how will it do so?

2. Please describe advising and student support at your institution. To what extent have you already engaged in advising reform or IPAS implementation? How will the institutional processes and procedures related to advising and student support change if IPAS is successful? How will data and predictive analytics inform your efforts?

3. Please select one word to describe how change happens at your institution. Why did you select this word?

4. Who will lead your IPAS project? Why this leader or group of leaders? What role will the college’s senior leadership play in the process, and why?

5. Please identify the IPAS system(s) you intend to implement for this project and the functionalities you intend to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning, (b) counseling and coaching, and (c) risk targeting and intervention. Please note: The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.

6. Please describe the project’s implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department’s responsibilities.

7. What concerns do you have and what challenges do you foresee in implementing and encouraging end-user adoption of IPAS? Summarize your plans (or strategy to develop plans) for addressing these challenges.

8. Describe the ambitious goals you plan to set for your college for this IPAS project. How will you measure the impact of IPAS at your college? What types of data are available for assessing IPAS outcomes? Consider academic records (i.e., student-unit record systems) as well as alternate forms of IPAS-related information (i.e., technology usage, vendor data). To what extent are these data available longitudinally and/or at the student-unit level?
Narrative 2

To be completed by the chief information officer (or the individual who, under whatever title, is the senior person responsible for the information technology at the institution). Narrative 2 should be a Microsoft Word or PDF document of no more than two single-spaced pages.

Please note: This narrative does not answer all questions from narrative 1: question numbering, which skips #2 and #8, reflects this.

1. Why are you seeking support for an IPAS project? What needs does IPAS address, and how will it do so?

3. Please select one word to describe how change happens at your institution. Why did you select this word?

4. Who will lead your IPAS project? Why this leader or group of leaders? What role will the institution’s senior leadership play in the process, and why?

5. Please identify the IPAS system(s) you intend to implement for this project and the functionalities you intend to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning, (b) counseling and coaching, and (c) risk targeting and intervention. Please note: The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.

6. Please describe the project’s implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department’s responsibilities.

7. What concerns do you have and what challenges do you foresee in implementing and encouraging end-user adoption of IPAS? Summarize your plans (or strategy to develop plans) for addressing these challenges.
Narrative 3

To be completed by the officer who leads institutional research at the institution. Narrative 3 should include a statement of support for the IPAS2 project and should be a Microsoft Word or Adobe PDF document of no more than two single-spaced pages.

Please note: This narrative does not answer all questions from narrative 1: question numbering, which skips #2 and #4, reflects this.

1. Why are you seeking support for an IPAS project? What needs does IPAS address, and how will it do so?

3. Please select one word to describe how change happens at your institution. Why did you select this word?

5. Please identify the IPAS system(s) you intend to implement for this project and the functionalities you intend to implement. As indicated in the RFP, institutions that are pursuing the use of all three functionalities will be preferred: (a) education planning, (b) counseling and coaching, and (c) risk targeting and intervention. Please note: The choice of systems you indicate here may change during the planning year as you learn more about the capabilities of possible systems.

6. Please describe the project’s implementation plan. What will departmental roles and responsibilities look like, what is your proposed timeline for work, etc.? Summarize your plans or strategies for successfully executing your department’s responsibilities.

8. Describe the ambitious goals you plan to set for your college for this IPAS project. How will you measure the impact of IPAS at your college? What types of data are available for assessing IPAS outcomes? Consider academic records (i.e., student-unit record systems) as well as alternate forms of IPAS-related information (i.e., technology usage, vendor data). To what extent are these data available longitudinally and/or at the student-unit level?
Additional STEM Challenge Narrative

To be completed by those colleges wishing to apply for the STEM challenge; available exclusively to Achieving the Dream Leader Colleges. This narrative should be a Microsoft Word or Adobe PDF document of no more than four single-spaced pages.

1. What are your college’s vision and goals for the future of advising for students on STEM pathways? (Vision is a statement that describes how the future will look and the goals are measurable and address how the college will achieve its vision.) You may consider including a discussion on topics such as high-need STEM disciplines, alignment of pathways offerings with local and regional workforce needs, and recruitment of underrepresented groups into STEM pathways.

2. Please describe your college’s current supports for students on STEM pathways, and identify specific areas needing improvement.

3. How would IPAS help promote success for students on STEM pathways? Please be sure to explain how IPAS would help address the areas of need you identified in response to question 2.