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**Request for Proposals (RFP)
for**



Stay the Course™ Program

**Date of Release: November 1, 2018
Responses Due: January 4, 2019 by 12 p.m. CST**

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I. Overview

Funding Opportunity Title:	<i>Stay the Course</i> [™] Program
Announcement Type:	Initial
Total # of Awards Available:	Three (3)
Grant Period:	4/1/2019 – 7/31/2023
Maximum CCFW Funding per Award:	\$1,259,250
Minimum Required Cash Match:	25% of total project cost
Eligible Applicants:	501(c)(3) non-profit social service organizations
Due Date for Applications:	1/4/2019 11:59a.m. CST

II. Executive Summary

Catholic Charities Diocese of Fort Worth, Inc. (hereinafter referred to as CCFW) invites eligible 501(c)(3) non-profit social service organizations (hereinafter referred to as Grantee) to submit competitive grant applications for the *Stay the Course* program, a randomized controlled trial. Through the *Stay the Course* program, CCFW will provide up to 75% of project funding to increase community college persistence and completion among low-income students. Grantee will provide support services to eligible low-income community college students to assist them with navigating personal and institutional obstacles that may impact post-secondary academic success. Grantee will be required to implement the *Stay the Course* program with fidelity to the model, as articulated and prescribed within the *Stay the Course* Provider Manual. Required activities will include intensive case management services, engagement events for students in the program, field trips to local four-year institutions, and distribution of emergency financial assistance for non-academic expenses. Grantee is required to collaborate with CCFW, University of Notre Dame’s Wilson Sheehan Lab for Economic Opportunities (hereinafter referred to as LEO), the Grantee’s partnering community college, and other *Stay the Course* Grantees to ensure implementation of the program and facilitate a community of learning.

III. Agency Background

CCFW is a mission-driven, faith-based, non-profit social service agency with a mission to serve, advocate, and convene, all in the spirit of addressing poverty, which seeks to:

- CREATE solutions that move people out of poverty and are able to be replicated and scaled;
- ERADICATE poverty for families by helping them to earn a living wage, have ample savings and established savings behavior, have no negative debt, and be free of government subsidies; and
- TRANSFORM how the social service industry and nation is solving for this age-old problem of poverty.

Towards this end, CCFW currently provides a diverse range of services, through more than 30 programs that address the needs of over 70,000 individuals and families annually. Among the many

services offered by CCFW, case management is the core. CCFW also provides comprehensive services that promote cultural adjustment, self-sufficiency, and citizenship among refugees. CCFW offers many other services that promote financial stability, prevent or end homelessness, restore relationships, improve health disparities, provide housing, and address immediate basic needs such as medical care for the uninsured and rental assistance for families facing eviction. All of these services play a role in CCFW's zealous goal to *end poverty*, one family at a time.

IV. Statement of Work

A. Program Description

CCFW is replicating its proven intervention, *Stay the Course*.

Stay the Course is a community college program administered by CCFW and researched by LEO through a randomized controlled trial (RCT). An RCT involves randomly assigning eligible students who express interest in *Stay the Course* into either a "treatment condition" that receives *Stay the Course* services or a "control condition" that receives services typically offered by the community college. Given the college completion crisis occurring in the nation, CCFW and LEO have committed to studying the effects of CCFW's model for increasing post-secondary success for low-income students in community colleges. There are four cited reasons why students are not persisting in college (cost of college, limited academic preparation, institutional obstacles, and personal obstacles). CCFW's theory of change is that institutional and personal obstacles can be overcome through intensive case management, which leads to persistence and graduation.

In 2013, CCFW and LEO launched *Stay the Course* in Tarrant County, Texas, in partnership with Tarrant County College (TCC). Since that time, over 400 students have participated in the program. The core intervention of the *Stay the Course* program is support from a navigator who works hand-in-hand with students to ensure college persistence and completion through intensive case management. The student and navigator work together to develop a service plan with specific, measurable, achievable, realistic, and time-bound (SMART) goals. Students enrolled in the *Stay the Course* program also have access to limited emergency financial assistance (EFA) for non-academic costs. This assistance is available for non-academic barriers that the student is facing that would prevent the student from persisting in school and eventually graduating.

The results of LEO's impact evaluation of *Stay the Course* have shown that after 3 years, *Stay the Course* participants are twice as likely to remain enrolled in college as the comparison group and are also more likely to graduate.

Due to the significant findings of LEO's study, CCFW has expanded *Stay the Course* to all five TCC campuses, developed a replication package, replicated the program at one site, and now seeks additional replication sites.

For more information on the success of the *Stay the Course* program, please visit:

<http://www.nber.org/papers/w24150>

B. Program Scope and Activities

PREPARE TO LAUNCH

Upon notification of award and execution of a contract between Grantee and CCFW, Grantee will be provided access to the *Stay the Course* Provider Manual. The manual contains the *Stay the Course* program content and materials that Grantee will use to implement the program. The first phase of implementation is *Prepare to Launch*, which includes all the tasks/steps that the Grantee must complete prior to launching the program. An overview of the tasks/steps that will need to be accomplished before the beginning of the academic school year include:

- Establishing and maintaining a positive and collaborative relationship with community college partners;
- Learning the data management system to track service delivery for program participants;
- Completing research pre-requisites (e.g., Memorandum of Understanding, Data Sharing Agreements);
- Hiring program staff for the *Stay the Course* program (e.g., Program Manager, Navigators, Data and Administrative Assistant); and
- Developing program materials and program specific trainings.

A successful launch of the *Stay the Course* program will be contingent upon timely execution of the above tasks/steps; therefore, Grantee is expected to begin these tasks/steps upon execution of the contract with CCFW.

RECRUITMENT

Grantee is responsible for recruiting and enrolling a minimum of 240 students (approximately 120 students into the treatment group and 120 students into the control group) into the *Stay the Course* program, no later than the end of the Spring 2020 semester. Grantee may back-fill Navigator caseloads through Fall 2020 to ensure they are at their caseload capacity.

This grant period will cover enrollment of students into the *Stay the Course* program for the following semesters only, for up to three (3) years of service for each participant:

- Fall 2019;
- Spring 2020; and
- Fall 2020.

Students eligible for the *Stay the Course* program are identified by LEO through data sharing with the community college, as detailed in Section VII and Attachment E. LEO will provide Grantee with a list of eligible students to use for recruitment and enrollment purposes.

The following are the eligibility criteria for participation in the *Stay the Course* program:

- Student is degree, certificate, or transfer seeking;

- Student is at least 18 years old;
- Student is eligible for the federal Pell Grant or is at or below 200% of the Federal Poverty Line;
- Student has completed less than 30 credit hours at the community college and accumulated less than 100 lifetime hours;
- Student is enrolled in a minimum of 6 credit hours;
- Student has a cumulative GPA of 2.0 or above at the community college or is new to the community college;
- Student has completed and passed at least one state assessment (if applicable);
- Student does not have a previous degree;
- Student is not co-enrolled in high school;
- Student is non dual credit; and
- Student is non early high school.

Grantee is responsible for distributing program invitations to all students on the eligibility list provided by LEO. Program invitations must be reviewed and approved by LEO prior to distribution. Program invitation templates will be provided by CCFW. Grantee is expected to send out program invitations to students through e-mail, postcards, letters, etc., to meet enrollment target. Invitations must include relevant information for students to access the *Stay the Course* enrollment website where they will learn more about the program and express interest in participating. Additionally, Grantee will be responsible for developing and distributing marketing materials for the program on-campus, to promote the *Stay the Course* brand and generate interest in the program. Any materials (e.g., invitations, marketing materials) used for recruitment purposes will need to be submitted to LEO for review and approval, prior to use.

The *Stay the Course* enrollment website is used as a tool to provide students with additional information regarding the program, allows students to express interest in participating, and randomizes students into the treatment or control group. As a result, all eligible interested students will be required to provide their information through this website. Grantee is responsible for ensuring students have completed the necessary steps in the *Stay the Course* enrollment website before proceeding with enrollment following random assignment procedures. Additionally, prior to enrolling a student into the program, Grantee is responsible for confirming students are on the eligibility list provided by LEO.

INTAKE

Students assigned to the treatment group will need to complete two (2) intake sessions before they become active in the program. Grantee is responsible for ensuring students complete both intake sessions within thirty (30) days of the student's enrollment date. Intake sessions should be completed by the student's assigned Navigator. The goal of intake sessions is for Navigators to begin developing rapport, obtain student information, complete required paperwork and assessments, and establish a service plan.

PROGRAM SERVICES (intensive case management, emergency financial assistance, auxiliary services)

Active students in the *Stay the Course* program will receive support services from Navigators to overcome personal and institutional barriers that threaten academic success through intensive case management, access to limited emergency financial assistance, and auxiliary services. Grantee will be required to implement and provide these program services as prescribed by the *Stay the Course* model.

Intensive Case Management. The goals of intensive case management services through the *Stay the Course* program are to:

- Help eliminate personal/institutional barriers for students;
- Make connections to campus/community resources (e.g., child-care, employment opportunities, transportation);
- Provide coaching to instill belief in academic success among students; and
- Increase persistence and degree/certificate completion or transfer.

Navigators will accomplish the goals of the *Stay the Course* program by adhering to the following program requirements:

- Meet with students in person bi-weekly;
- Engage in meaningful reciprocated contact with students weekly (phone, e-mail, text);
- Complete required program assessments as prescribed by the model;
- Collaborate with students to develop/update their SMART service plan each semester; and
- Work hand-in-hand with students to ensure progress is made towards goals on SMART service plan (i.e., completion of an action step every 21 days).

Emergency Financial Assistance (EFA). Active students in the *Stay the Course* program will have access to limited EFA for non-academic costs. Each student has access to a total of \$1,500 of EFA for the duration of the program with a maximum of \$500 per semester. EFA cannot be used for academic costs (e.g., tuition, books, school supplies) but, rather, is to be used for non-academic emergency financial issues that would impact a student's ability to persist in school. Students are required to apply for EFA and must demonstrate an emergent need (e.g., eviction notice, past-due bill) in order to receive EFA. Additionally, EFA is distributed directly to vendors by *Stay the Course* program staff to ensure expedited payment and prevent misuse of funds.

Grantee will be responsible for allocating EFA to students and tracking EFA distribution to ensure students do not exceed their semester/lifetime EFA cap.

Auxiliary Services. In addition to intensive case management services and access to limited emergency financial assistance, the *Stay the Course* program hosts a variety of events for active students in the program, to increase/maintain student engagement, especially during breaks (i.e., summer, winter, spring) in the academic year. Grantee will be required to host at least one (1) engagement event for breaks that last longer than one (1) week. As a best practice, engagement events should be held in a central location that is convenient/accessible for students in the program. Examples of engagement events include ice cream socials and coffee meet-ups.

In addition to engagement events, Grantee is required to arrange field trips for active students in the program to local four-year institutions at a minimum of once per year. Field trips are intended to expose students to an academic setting at a four-year institution. This is beneficial for students who are considering transferring or whose goal is to transfer. Scheduling field trips during summer breaks is recommended, as they are a good opportunity to engage students in the program.

Case Management Closure. Navigators will equip and prepare active students for discharge from the *Stay the Course* program by having intentional conversations during the student's final semester in school. Navigators will work together with students to develop an aftercare plan that provides the student with, at minimum, a list of potential resources that may be beneficial for the student in the future.

ADMINISTRATION

Grantee will be responsible for ensuring the *Stay the Course* program is implemented with fidelity to the model and that quality services are provided to students in the program. This will require the Grantee to maintain oversight of program operations and program staff and perform/participate in quality assurance activities.

C. Case Record Requirements

CCFW requires that Grantee maintain individual case records for all students who are assigned to the treatment group. Case records are required to be created within two (2) business days of the student being enrolled into the program. Case records must contain all information collected on the participant and services provided by *Stay the Course* program staff.

D. Partner Roles and Responsibilities

The following section details the roles and responsibilities of all partners involved in replication of the *Stay the Course* program.

GRANTEE (I.E., 501(C)(3) NON-PROFIT SOCIAL SERVICE ORGANIZATION)

The Grantee will serve as the implementer of *Stay the Course*. The role of the Grantee will be to implement this evidence-based program in accordance with the current program design. Grantee will be responsible for:

- Operationalizing and implementing the *Stay the Course* program within their organization with fidelity to the model as described in the *Stay the Course* Provider Manual;
- Managing a successful and collaborative relationship with their community college partner;
- Connecting CCFW with appropriate contacts within the community college to facilitate the execution of a Memorandum of Understanding, Data Sharing Agreement, and support on-going data requests in accordance with these agreements;

- Recruiting and enrolling a minimum of 120 students into *Stay the Course* services (treatment group) and 120 students into the control group by the end of the Spring 2020 semester;
- Back-filling Navigator caseloads through Fall 2020 to ensure Navigators caseloads are at capacity;
- Following random assignment procedures to ensure research integrity;
- Participating in training and technical assistance, data sharing, and continuous quality improvement efforts;
- Raising the committed funding (cash match requirement) to implement *Stay the Course* as detailed in Section IX;
- Collaborating with CCFW on fundraising efforts for the total project cost, as needed and determined by CCFW;
- Attending a two-day training at an existing *Stay the Course* site on an annual basis, prior to the beginning of the academic school year (all *Stay the Course* program staff required to attend);
- Adhering to all data sharing requirements as described in Section VII this RFP;
- Utilizing a centralized database managed by CCFW to record and track participant activities and program services ; and
- Participating in site visits from a third-party researcher, if applicable, to allow qualitative research to be conducted on the *Stay the Course* program. As funding allows, this researcher focuses on tests of fidelity and implementation at each site.

CCFW will provide Grantee with the tools and resources necessary to implement the *Stay the Course* program with quality and fidelity to the model. This will include a web-based *Stay the Course* Provider Manual (i.e., program content and materials), training and technical assistance, and reporting guidelines and requirements.

COMMUNITY COLLEGE

The community college will be responsible for supporting implementation of the *Stay the Course* program. The following is required from the community college in order for the *Stay the Course* program to be a good fit:

- Support from the system president or chancellor;
- Support from the campus president(s);
- Support from relevant community college departments that will be involved with supporting implementation of the program (e.g., financial aid, institutional research, student affairs);
- A full-time Pell Grant eligible student population greater than 4,700, or ability to demonstrate that enrollment targets for the program can be fulfilled if the full-time Pell Grant eligible student population size is less than 4,700;
- A commitment to market and advertise the *Stay the Course* program to students to assist with recruitment efforts;
- A commitment to allow distribution of marketing materials on-campus by *Stay the Course* program staff;
- At minimum, private office space for navigators and student meetings. A commitment to provide permanent office space for *Stay the Course* program staff is preferred;

- A commitment to execute a data sharing agreement with LEO, Grantee, and CCFW to gain access to appropriate data, as outlined in Section VIII, to:
 - Identify a population of eligible students;
 - Have access to a large enough pool of students to randomize students into control and treatment groups without interfering with research integrity;
 - Have access to student records related to persistence, completion, and transfers; and
 - Have access to and report to the National Student Clearinghouse.

CCFW

CCFW is the originator of *Stay the Course* and will serve as the central organization coordinating the elements of the replication network. CCFW will act as the central hub for communication between the Grantee, community college, and LEO, and is responsible for relationship management amongst all partners. CCFW will support the implementation of *Stay the Course* at replication sites. CCFW will be responsible for compiling and distributing key information for implementing the *Stay the Course* intervention, providing training and technical assistance to Grantee, and performing quality assurance activities at each replication site to support program improvement with alignment with the model. CCFW will also provide Grantee with back-end administrative support with applicable databases and websites. CCFW will also commit to funding a portion of project costs as detailed in Section IX.

To learn more about CCFW, please visit www.catholiccharitiesfortworth.org.

LEO

LEO is a research lab housed in the Department of Economics at the University of Notre Dame. LEO matches top researchers with social service providers to conduct impact evaluations that identify the innovative, effective, and scalable programs and policies that support self-sufficiency. LEO's research is conducted by Notre Dame faculty as well as an interdisciplinary network of scholars from across the country with expertise in designing and evaluating the impact of domestic programs aimed at reducing poverty and improving lives. LEO disseminates its key findings to policymakers and front-line providers in order to support evidence-based policy and programming decisions that effectively and jointly reduce poverty in the United States.

LEO will conduct an impact evaluation of *Stay the Course* at each replication site. Impact evaluations assess the overall outcomes of a project, focus on finite goals rather than inputs, and involve a careful comparison to understand what would have happened in the absence of the intervention. The results of impact evaluations can be used to inform decisions about whether to expand, replicate, or scale the intervention. LEO will conduct the impact evaluation in the form of a randomized controlled trial (RCT). LEO will commit to funding costs related to University of Notre Dame staff and benefits, travel, and final dissemination of the research work.

LEO will also be responsible for coordinating site visits for the qualitative researcher. This work involves site visits quarterly during the first year of implementation and biannually in years two through four. This work is dependent on external funding that LEO is responsible for raising.

To learn more about LEO, please visit <https://leo.nd.edu/>.

E. Staffing

Grantee will be responsible for hiring and maintaining the following staffing structure for *Stay the Course*:

- Program Manager (1 FTE) – responsible for operationalizing the *Stay the Course* program and providing oversight of program staff;
- Program Data and Administrative Assistant (1 FTE) – responsible for allocating EFA and providing administrative and data support to program staff; and
- Navigators (3 FTEs) – responsible for providing program services to students.

Grantee is responsible for ensuring *Stay the Course* program staff meet the following basic minimum requirements prior to extending offers to candidates:

PROGRAM MANAGER:

- Three (3) to five (5) years of case management experience serving diverse, marginalized, and/or low-income populations;
- Bachelor's degree in social work or related field (Master's degree preferred);
- Two (2) years of management experience overseeing individuals in a social service setting; and
- Knowledge of data-driven programs, metrics, and outcomes.

PROGRAM DATA AND ADMINISTRATIVE ASSISTANT:

- Associate degree in related field (Bachelor's degree preferred);
- Proficient with MS Excel and Word;
- Experience with databases;
- Two (2) years of experience in data entry, collection, and analysis; and
- Two (2) years of experience in providing administrative support.

NAVIGATORS (maximum caseload of 40 students per Navigator):

- Bachelor's degree in Social Work or related field (Master's degree preferred);
- Two (2) years of case management experience serving diverse, marginalized, and/or low-income populations, or combination of education and experience;
- Valid driver's license and reliable transportation; and
- Knowledge of data-driven programs, metrics, and outcomes.

Grantee will agree to hire program staff who meet the minimum requirements specified above. If the Grantee would like to hire someone who does not meet the minimum requirements, they agree to submit a special exception to CCFW for approval. After *Stay the Course* program staff have been hired, Grantee will submit their resumes to CCFW for recordkeeping purposes.

V. Quality Assurance

Quality assurance activities will be performed to ensure the *Stay the Course* program is being delivered with excellence and fidelity to the model. Quality assurance activities will be conducted by CCFW and will include on-site monitoring visits, data collection and analysis, and bi-weekly calls.

A. Monitoring Visits

Grantee will be subject to on-site monitoring visits by CCFW staff, at minimum, once per quarter for a minimum of two (2) business days during their first year of implementation. After Grantee's first year of implementation, Grantee will be subject to bi-annual (i.e., twice per year) on-site monitoring visits. Monitoring visits will always include a programmatic monitoring. Fiscal monitoring will occur annually, at minimum, and will be conducted remotely by CCFW. Grantee will be notified thirty (30) days in advance of a monitoring visit through a monitoring notice that will specify the date(s)/time(s) of the visit. The monitoring notice will also include components (e.g., case record reviews, observations, etc.) of the monitoring visit.

CCFW reserves the right to adjust the frequency of monitoring visits, based on the results of quality assurance activities. During on-site monitoring visits, all areas of the program will be subject to review to ensure fidelity to the *Stay the Course* model and may include, but are not limited to:

1. Agency administrative/fiscal records (e.g. personnel records, bookkeeping records);
2. Program administrative records;
3. Observations of navigator-student interactions (contingent on students' consent); supervision sessions, and team meetings;
4. Case consultations;
5. Client case records (e.g. progress notes, service plans); and
6. Interviews with staff.

CCFW will utilize assessment tools during on-site monitoring visits to assess program implementation and quality of service delivery. If CCFW staff have any concerns regarding implementation of the *Stay the Course* program or service delivery, they will be addressed directly with key agency/program staff. CCFW may require Grantee to create and submit Corrective Action Plans based upon results of the on-site monitoring visit. If a Corrective Action Plan is requested, Grantee will have thirty (30) days from the date of the request to submit it to CCFW. CCFW will collaborate with Grantee to approve Corrective Action Plans. Once a Corrective Action Plan is approved, CCFW will provide continuous monitoring to ensure it is implemented and results in the intended outcome.

B. Data Collection and Analysis

Implementation of the *Stay the Course* program will also be monitored by evaluating key performance metrics obtained through data sharing and monthly/semester progress reports. CCFW will be the administrator of a centralized database that all *Stay the Course* Grantee will be required to use. CCFW will access data through this centralized database on a regular and on-going basis to monitor implementation of the program. Grantee will need to ensure clean, accurate, complete, and timely data entry occurs to allow for a meaningful and accurate analysis of program

implementation. Grantee acknowledges CCFW will have access to all participant data through the centralized database. If any data cannot be captured through the centralized database, Grantee will be required to submit data through monthly/semester progress reports. Similar to on-site visits, if CCFW staff have any concerns regarding implementation and service delivery through review of data provided by replication sites, CCFW may request that replication sites develop Corrective Action Plans. CCFW will facilitate monthly implementation meetings with Grantee at the end of each month, to discuss program implementation and trends identified through monthly/semester progress reports.

C. Bi-weekly Calls

CCFW will also coordinate and facilitate bi-weekly calls with Grantee to provide support/guidance on implementation of the program, engage in high-level problem solving, discuss trends identified through data collection and analysis, and provide training and technical assistance, if needed. Grantee will ensure any agenda items they want to cover during calls are provided to CCFW at least one business day prior to the scheduled call.

VI. Training and Technical Assistance

CCFW will provide Grantee with access to a web-based *Stay the Course* Provider Manual that contains comprehensive program content and materials to enable agencies to implement *Stay the Course*. The *Stay the Course* Provider Manual is web-based and is maintained by CCFW. CCFW will provide training to Grantee on how to navigate the website. Grantee is responsible for reviewing the entire *Stay the Course* Provider Manual and accessing the website regularly to stay informed of any updates to the content and/or materials provided.

Additionally, CCFW will host an annual orientation/training at an existing *Stay the Course* site. All *Stay the Course* program staff are required to attend this two (2) day training annually. The annual training will cover a variety of topics including, but not limited to, the *Stay the Course* model, partner roles, and expectations. Additional trainings may be developed and included based on feedback from replication sites. The expense for on-site training must be included in your *Stay the Course* budget proposal.

Grantee will need to ensure that program staff hired for *Stay the Course* complete trainings specific to each of the activities performed in *Stay the Course* (e.g., recruitment, intake, intensive case management, emergency financial assistance, auxiliary service, case record management, and case closure) and review the *Stay the Course* Provider Manual. Grantee will be responsible for facilitating these trainings and should utilize the *Stay the Course* Provider Manual to create and facilitate these trainings.

Bi-weekly calls will be utilized as a space for training and technical assistance, if needed. These calls may be performed at a group level when more replication sites have been established.

CCFW will work in collaboration with Grantee to develop a training and technical assistance plan specific to the needs of the organization. Based upon the training and technical assistance needed,

CCFW may provide support through phone calls, webinars, presentations, guides/manuals, or on-site trainings. Training and technical assistance will be provided on an on-going basis to ensure fidelity to the *Stay the Course* model.

VII. Intellectual Property

Stay the Course, its logo, name, and the content provided for the purpose of implementing *Stay the Course* are the property of CCFW. Grantee will agree not to distribute, transfer, or provide access to the *Stay the Course* Provider Manual or any other materials/resources provided for the purpose of implementing the program to anyone outside of their organization without express written permission from CCFW.

VIII. Data Management System and Sharing Requirements

A. Data Management System Requirements for *Stay the Course* Grantee

Grantee will be required to use a *Stay the Course* centralized database managed by CCFW to record and track participant activities and program services. CCFW will facilitate training Grantee on how to navigate and input data into the centralized database. Reports from CCFW's centralized database will be utilized by CCFW to analyze program implementation quality and consistency and inform training and technical assistance plans. Knowledge of CCFW's centralized database, accuracy, and timely entry (in accordance with timelines specified in the *Stay the Course* Provider Manual) of information is critical. Grantee is responsible for ensuring that staff appropriately utilize the database, input data in accordance with timelines specified within the *Stay the Course* Provider Manual, and adhere to all reporting requirements. In addition, Grantee may be asked to provide additional data not accessible through the centralized database through monthly/semester progress reports to evaluate performance outcomes (including strengths and weaknesses related to program implementation).

B. Data Sharing Requirements for *Stay the Course* Grantee and Community College(s)

An essential component of both LEO's impact evaluation and CCFW's quality assurance process is the sharing of program implementation, student eligibility, and student outcome data. The following sections detail the data sharing requirements for the Grantee and the community college. The contract executed between CCFW and the Grantee will serve as the Data Sharing Agreement (DSA) between CCFW and the Grantee. Upon notification of award, a separate DSA will be executed between the community college, LEO, Grantee, and CCFW. The DSAs will describe the data that each entity will provide, the purpose for the data, how each entity will use the data, when and how frequently the data will be provided, how the data will be securely transferred and stored, and how privacy protections will be ensured.

DATA SHARING REQUIREMENTS FOR GRANTEE

The following section details the data sharing that will occur between Grantee and CCFW.

CCFW will be the administrator of a centralized database that all *Stay the Course* Grantees will be required to use. As the administrator, CCFW will have access to all participant data collected through the centralized database. CCFW will access data on a regular and on-going basis to monitor implementation of the program. Grantee acknowledges that CCFW has access to all participant data and that the CCFW *Stay the Course* Implementation Team will examine data including, but not limited to: student enrollment, service output, client engagement and retention, student outcomes, and qualitative data on program administration and oversight.

CCFW will perform regular data audits to monitor data entry. The CCFW *Stay the Course* Implementation Team will request Grantee to clean data if any inconsistencies are identified through data audits/pulls. Grantee is accountable for ensuring program staff are trained on the centralized database and that clean, accurate, complete, and timely data entry is occurring.

Grantee will be expected to track data for all students assigned to the *Stay the Course* treatment group through random assignment. Grantee will not need to create a case record for students assigned to the control group; however, Grantee will be expected to track recruitment efforts made for all eligible students. LEO will collect outcome data for students assigned to the control group from the community college.

The following outline includes, the data that will be collected and analyzed through the centralized database. If any additional data is required that is not specified below, the Grantee will be notified in a timely manner. If any of the data specified below cannot be collected through the centralized database, Grantee will be expected to submit reports (i.e., Monthly Progress Report, Semester Progress Report) with the data.

Student Enrollment Data

Student enrollment data includes student demographics and eligibility type:

- Student contact information
- Student demographics
- Income eligibility criteria

Service Output Data

Service output data includes efforts undertaken by *Stay the Course* program staff at the replication site:

- Recruitment efforts (frequency) and challenges (narrative)
- Initial and reassessment completion (frequency)
- Student contact attempts (type – email, phone, text, frequency, duration)
- In-person case management sessions (frequency, duration)
- Emergency financial assistance allocation (amount, frequency, reason)
- Delivery of auxiliary services including field trips, engagement events, and graduation ceremonies (frequency and narrative)

- Active caseload size (count)
- Employee training log (type, frequency, description)

Client Engagement and Retention Data

Client engagement and retention data includes the results and reactions of *Stay the Course* participants to the efforts undertaken by the *Stay the Course* staff:

- Enrollment numbers (count)
- Client retention (count)
- Reciprocated contact (count)
- Attendance for auxiliary services (count)
- Risk of drop out assessments (score summary)

Student Outcome Data

Student outcome data includes the changes in students' lives that occur while enrolled in the *Stay the Course* program:

- Service plan progress (narrative, frequency of action step completion)
- Client narrative; success and challenges (narrative)
- Educational audits (score summary)
- Strengths Map (score summary)

Work Plan

CCFW will perform data pulls on the 5th of each month (for the previous month) from the centralized database to analyze the data specified above. Grantee is required to input clean, accurate, and complete data. CCFW will review the data, request cleaning, develop customized reports using the data to share with the replication site and LEO, and provide consultations on how the Grantee can apply the data. During and after consultations, the Grantee will provide feedback to CCFW on the interpretability and usefulness of the reports to promote a continuous formalized feedback loop.

Should Grantee need to submit reports for any of the data specified above, reports will be due by the 15th of each month (for the previous month) and/or within thirty (30) days following the end of a semester (i.e., fall, spring, summer). Reports will be submitted to CCFW for review and analysis through a Secure File Transfer Protocol Site.

Report Templates and Submission

Upon selection and notification of award, Grantee will receive templates for submitting the *Monthly Progress Report* and *Semester Progress Report*, if needed. CCFW will provide training and technical assistance on submitting reports and will be responsible for establishing secure data transfer procedures.

DATA SHARING REQUIREMENTS FOR THE COMMUNITY COLLEGE

The following section details the data sharing that will occur between the community college, LEO, Grantee, and CCFW. A sample DSA has been provided as Attachment E for reference.

Upon notification of award and execution of a contract between CCFW and Grantee, Grantee will need to collaborate with CCFW, LEO, and community college to execute a DSA.

The community college will be required to share data as described below and in accordance with all state and federal regulations to enable the following activities:

- Recruitment and enrollment of students who meet the eligibility criteria for the program, and
- Outcomes analysis.

Data File Structure and Format, Data Transfer Schedule, and Data Transfer Procedures

The community college will upload files to a secure, cloud-based file-sharing location managed by LEO in a comma delimited .csv format. Files will be encrypted and password protected. The community college will link all data files shared with LEO to one or more academic terms. This can be accomplished by creating separate files and naming them according to their terms.

Details of the data transfer schedule and data transfer procedures will be outlined in the DSA. At a minimum, the community college will provide data to LEO four (4) times per academic semester.

Students Included in Data

When sending data to LEO, the community college will provide data on students who meet the following eligibility criteria:

1. Pursuing a degree, certificate, or transfer;
2. Pell eligible or fall below 200% of the poverty line;
3. Non dual credit; and
4. Non early high school.

The community college will exclude data on students who are co-enrolled in high school and the community college during the period covered by the data. The community college will also exclude data on students who are under 18 years of age at the time of the data collection. The community college will not include data for students who fall into one or both of the excluded groups.¹

Recruitment and Enrollment

The community college will provide LEO and the replication site data to enable recruitment and enrollment efforts. This will include a process of filtering student data for eligibility criteria.

Following the end of each semester's class registration, LEO will use the data to screen for additional eligibility criteria. Specific variables shared with LEO to enable recruitment and enrollment are specified in the DSA (please refer to Attachment E for a sample DSA) and will include, at minimum,

¹ FERPA allows the community college to disclose student data to research organizations, such as LEO, that are conducting research on behalf of the college. Separately, FERPA also requires colleges to provide students with the opportunity to "opt-out" of the disclosure of their directory information to third parties. The ability of the community college to disclose student data to the research organization under FERPA is separate from and unaffected by an individual student's decision to opt-out of the disclosure of their directory information. Therefore, the community college will disclose the student data described in the preceding section to LEO regardless of whether students have requested that their directory information not be disclosed.

variables used to identify and contact students, relevant observable characteristics, and data to determine program eligibility.

In addition to using these variables as baseline indicators, LEO will filter students in accordance with the below remaining eligibility criteria:

1. Students must enter with a GPA above 2.0 or be new to the community college, and
2. be enrolled in at least 6 credit hours for the upcoming semester, and
3. have passed at least one state assessment (as applicable), and
4. have accumulated 30 or fewer hours at the community college and 100 or fewer lifetime hours.

Community College and National Student Clearinghouse Outcomes

Following the completion of each semester, the community college will provide LEO with semester outcomes for all students enrolled in the study. Details on variables to be shared are articulated in the DSA (please refer to Attachment E for a sample DSA) and will include, at a minimum, student ID, GPA, enrollment status, and semester hours completed.

At the start of each semester, the community college will put in a request on LEO's behalf to the National Student Clearinghouse for additional outcomes. The following variables will be included in this dataset:

- Student ID (Requester Return Field)
- Record Found Y/N
- College Name
- 2-year/4-year
- Public/Private
- Enrollment Begin
- Enrollment End
- If Graduated
- Graduation Date
- Degree Title
- Degree Major
- College Sequence

FERPA

The DSA will include specifics on adherence to the Family Educational Rights and Privacy Act of 1974 (FERPA) for all parties in accordance with federal and state law. While in possession of FERPA records and data, only persons authorized to access the student data for the study will be granted access as required by FERPA. Furthermore, data will be stored in a secure area as required by FERPA. All persons authorized to have access to student data understand that under FERPA they can be held individually liable for any and all applicable criminal and civil penalties imposed for breach of confidentiality.

State Earnings Records

In addition to data on academic persistence and completion, the *Stay the Course* research study is examining the impact of the program on students' earnings post-graduation. The procedures to link student outcome data to earnings records varies by state, and the specifics of how the community college will be asked to participate in this process will be outlined in the DSA. At a minimum, the community college affiliated with the replication site is required to participate in the process of helping LEO to obtain access to state-level earnings records.

IX. Financial Information

A. Overview

Grantee will demonstrate good financial position as an organization and have internal controls in place to fulfill the requirements of the services outlined in this RFP. CCFW will be using two items to assess these two components: a project budget proposal and an Internal Control Structure Questionnaire (ICSQ) as it pertains to your organization.

CCFW has prepared a budget estimate (Table A) of all costs to operate the *Stay the Course* program. This budget estimate is based upon the local costs of the *Stay the Course* program in Fort Worth, Texas, and CCFW's cost structure as an organization. This has been provided to assist Grantee with developing their project budget proposal for the response package. Grantee may allocate the "Grantee Portion" in Table A across budget periods, as needed, when developing their budget proposal. Grantee will be responsible for adhering to the budget proposal and budget periods submitted in their response package. All budget proposal change requests, including requests to rollover unused funds into the next budget period, must be submitted to CCFW in writing. Requests will be reviewed by CCFW's accounting department and approved or denied based upon information provided.

Included in Table A are estimates of full site costs to implement and operate the *Stay the Course* program. The program will serve students over a 4-year period, with some additional time to prepare and conclude the project. For simplicity, the annual budgeted cost represents the total project costs averaged over 4 years. The estimated intervention costs are listed below, which amount to a total of \$1,679,000 over the 4-year project period.

TABLE A. *Stay the Course* Cost Estimates²

Budget Period	Total Cost	Grantee Portion	CCFW Maximum Award
April 1, 2019 – July 31, 2019	\$89,000	\$22,250	\$66,750
August 1, 2019 – July 31, 2020	\$411,000	\$102,750	\$308,250
August 1, 2020 – July 31, 2021	\$444,000	\$111,000	\$333,000
August 1, 2021 – July 31, 2022	\$426,000	\$106,500	\$319,500
August 1, 2022 – July 31, 2023	\$309,000	\$77,250	\$231,750

² Cost estimates provided in Table A may vary based upon local costs and Grantee's cost structure as an organization.

TOTAL SITE COST:	\$1,679,000	\$419,750	\$1,259,250
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B. Match Requirements

The minimum cash match required from Grantee is 25%. Grantees committing to a greater than 25% cash match will be given preference in the selection process. The maximum amount funded for the 4-year period by CCFW will be \$1,259,250. The funding period for this project will be April 1, 2019 – July 31, 2023.

In addition to the minimum match requirement, Grantee may be required to collaborate with CCFW on fundraising efforts for the total project cost. A collaborative fund development plan in a grantees local community may be requested.

C. Budget Requirements

Budgets will be required to cover the following expenses to support alignment with the *Stay the Course* model. All costs below are to be included in the Grantee budget proposal.

1. Program staffing at the social service agency should consist of:
 - Director of Programs (appropriate share)
 - Program Manager (100% of 1 FTE), to be hired by May 1, 2019, prior to the first academic year
 - Navigator (100% of 2 FTE), to be hired by July 16, 2019, prior to the first academic year
 - Navigator (100% of 1 FTE), to be hired by December 1, 2019, prior to the 2nd semester of enrollment (earlier hiring is an allowable expense)
 - Data and Administrative Assistant (100% of 1 FTE) to be hired by July 16, 2019, prior to the first academic year
 - *Note:* Navigator role provides intensive case management, so salary estimates are encouraged to be equivalent to a locally competitive case manager salary.
2. Emergency Financial Assistance (EFA): \$1,500 per student estimated to be spent over 4 years. Historically, CCFW has spent an average of \$1,000 per student. This cost may vary based on local costs.
3. Engagement Events: Student social events, for the purpose of promoting cohort relationships and student engagement.
4. Campus Visits: Arranging visits to local four-year institutions for students in the *Stay the Course* program. Costs may include up to three (3) college campus trips per year.
5. Travel: Must include costs to support all *Stay the Course* program staff to attend a 2-day annual training at an established *Stay the Course* site and mileage for navigators to meet with students at community college campuses on a daily basis.
6. Recruitment/Giveaways: Promotional materials to support recruitment efforts, such as T-shirts.
7. Marketing: Marketing materials, such as posters and advertising.
8. Program Participation Invitations: Invitation materials, such as postcards and postage.
9. Database fee: Costs to maintain user licenses for database and any additional database management costs.

10. Access Fees to obtain access to state-level administrative data on labor market participation for *Stay the Course* students post-graduation. This will vary depending on state fees to access this data.

Grantee must be willing to participate and cover their costs of participation for the full 4-year term of the contract. In the event that a Grantee breaches or terminates their contract before the end of the grant period, they must repay CCFW grant money that has previously been awarded.

X. Applicant Eligibility Criteria

Eligible applicants for the *Stay the Course* program are 501(c)(3) non-profit social service organizations. Higher education institutions that have a 501(c)(3) IRS status are not eligible to apply for this grant.

XI. Application and Submission Information

A. Questions about the RFP

Questions regarding this RFP must be emailed to the contact person for this RFP: Natalie Jacobs, Program Manager for CCFW's *Stay the Course* replication program. She may be reached at njacobs@ccdofw.org. Questions may not be submitted to other CCFW staff while the application is open. Additionally, phone calls will not be accepted to answer any questions regarding this RFP.

Questions about this RFP must be submitted by Monday, December 3, 2018, by 12:00 p.m. (CST). CCFW will not respond to any questions submitted after this date. All questions and answers will be posted on the CCFW website (www.catholiccharitiesfortworth.org) by Monday, December 10, 2018, by 5 p.m. (CST).

B. Intent to Apply

Interested organizations must email their intent to apply to Natalie Jacobs (njacobs@ccdofw.org) by Friday, December 14, 2018, by 5 p.m. (CST). Applications will not be accepted from organizations that have not submitted an intent to apply.

C. Submission Information

Proposals are due by **11:59 a.m. (CST) on January 4, 2019**. Proposals must be submitted electronically (either via email or flash drive) and delivered to:

Email submission:

njacobs@ccdofw.org

Flash drive submission:

Catholic Charities Fort Worth

Nenetta Burton Carter Building
 249 West Thornhill Drive
 Fort Worth, TX 76115
 ATTN: Natalie Jacobs

Delivered flash drives should be sealed in an envelope and addressed to Natalie Jacobs, *Stay the Course* Replication Program Manager.

Response packages are required to be arranged and submitted in the same order as listed in section XI.e. Each item must be submitted as a separate attachment and labeled as identified in section XI.e. All items must be submitted in PDF format.

Late submissions, received after 11:59 a.m. (CST) on January 4, 2019, incomplete, non-compliant, faxed, or hard copy proposals will not be accepted.

D. Timeline

Timeline	Date
RFP questions accepted	November 1, 2018 – December 3, 2018 12 p.m. (CST)
Answers to questions posted on CCFW website	December 10, 2018 5 p.m. (CST)
Intent to apply due to CCFW	December 14, 2018 5 p.m. (CST)
Proposals due to CCFW	January 4, 2019 11:59 a.m. (CST)
Proposal evaluation period	January 7, 2019 – January 25, 2019
Finalists notified	January 25, 2019 by 12 p.m. (CST)
Site visits	January 28, 2019 – February 22, 2019
Award notification	March 1, 2019 5 p.m. (CST)
All applicants not selected notified	March 8, 2019 5 p.m. (CST)

Applicants who are selected as a finalist will receive a site visit from CCFW and LEO staff between January 28, 2019, and February 22, 2019. The applicant organization’s President/CEO or Executive Director and a representative from the community college leadership team must be available for the site visit. A tour of the community college is preferred during site visits.

E. Response Package

Proposals should be as thorough and detailed as possible so that CCFW may properly evaluate the Grantee’s capacity and ability to operationalize and implement the *Stay the Course* program with fidelity to the model.

Response packages are required to be arranged and submitted in the same order as listed in below. Each item must be submitted as a separate attachment and labeled as identified in the table below. All items must be submitted in PDF format.

Applicants shall provide all of the documentation and exhibits identified below.

Item		✓
1.	Letter of Support: Include a letter signed by Executive Director/CEO indicating support of the project and alignment of this project with agency's strategic goals. Submission Label: Letter of Support – Service Provider (name)	
2.	Letter of Support(s): Include a letter signed by school officials from the community college(s) that will be participating indicating support of the project at their campus (a letter of support must be provided by each proposed community college partner). The letter must specifically address commitment to data sharing, supporting evaluation of the program, and participating for the term of the project. Submission Label: Letter of Support – Community College (name)	
3.	Attachment A – RFP Response Form – Service Provider Submission Label: Attachment A	
4.	Attachment B – RFP Response Form(s) – Community College (Attachment must be completed by each proposed community college partner.) Submission Label: Attachment B	
5.	Completed Attachment C – Grantee Project Budget Submission Label: Attachment C	
6.	Attachment D – Internal Control Structure Questionnaire (ICSQ) and any relevant attachments. Mark “N/A” any questions that reference the UGG or UGMS that are believed to not be relevant to applicant’s agency at this time. CCFW will reach out for clarification, if needed. Submission Label: Attachment D	
7.	Historically Underutilized Business (HUB) status: include proof of status, if applicable. Submission Label: HUB Status	

F. Evaluation Criteria

Applications will be evaluated utilizing the following criteria:

Evaluation Criteria		Score
A	<u>Completeness of Response:</u> Responses to this RFP must be complete. Responses that do not include the response package contents identified within this RFP (section XI.e), and do not address each of the items listed below will be considered nonresponsive. The response will be rated a Fail in the Evaluation Criteria and will receive no further consideration.	Pass/Fail
B	<u>Administrative/Organizational Capacity:</u> Application must provide evidence that the applicant and its required partners have the fiscal, administrative, and performance management capacity to administer the <i>Stay the Course</i> program.	10 Points
C	<u>Demonstrated Performance/Ability:</u> Proposals must demonstrate that the applicant has experience serving low-income individuals and providing intensive case management.	25 Points

	Applicant must demonstrate experience with research, evaluation, and data. Applicant must demonstrate commitment on behalf of the community college to implement the program. Community college must demonstrate commitment and willingness to support implementation of the program.	
D	<u>Quality/Comprehensive Service:</u> Applicant must demonstrate experience with program evaluations or reviews. Proposal must demonstrate a clear explanation of how the applicant will provide quality case management services and ensure fidelity to the model.	25 Points
E	<u>Prepare to Launch Timeline (in attachment A):</u> Applicant must show that it has a strong understanding of tasks that need to be completed to implement the program, capacity, and operational infrastructure to launch the <i>Stay the Course</i> program by the beginning of the 2019 academic year.	25 Points
F	<u>Budget Considerations/Financial Integrity:</u> Applicant must show a strong understanding of financial procedures and fiscal management. Applicant must show a commitment and ability to deliver on the cash match requirements. Budget narrative must be completed in Attachment B.	15 Points
Total Points		100

In addition to the above selection criteria, preference will be given to applicants who meet any of the following:

- Commit to a cash match above the required 25% minimum;
- Meet the following criteria:
 - IPEDS 2016-17 Classification of 41-43;
 - 5 or more miles from an urbanized area (population greater than 50,000);
 - or
 - 2.5 or more miles from an urban cluster (population between 2,500 and 50,000)
 - Poverty rate for one or more counties the community college is either located in or serves is greater than the national average (14 percent);
 - Unemployment rate for one or more counties the community college is either located in or serves is greater than nation average (4 percent); and
 - Community college partner graduation rate (within six (6) years) less than national average (38 percent).

XII. Terms and Conditions

A. Award

Any award of a contract resulting from response to this RFP shall be made by Catholic Charities Fort Worth's President/CEO no later than thirty (30) business days after award notification.

B. Term

The term of this contract, which may be awarded pursuant to this RFP, will be from April 1, 2019 – July 31, 2023.

XIII. Attachments

- A. Attachment A – Service Provider Response Form**
- B. Attachment B – Community College Response Form**
- C. Attachment C – Grantee Project Budget**
- D. Attachment D – Internal Control Structure Questionnaire**
- E. Attachment E – Sample Data Sharing Agreement**
- F. Attachment F – Sample Memorandum of Understanding**