Professional Learning Partnerships to advance professional learning services supporting implementation of high-quality instructional materials:

Request for Proposal
Concept Proposal Deadline: March 8, 2019
Awards Announced (estimated): May 2019

Overview

Introduction

This request seeks to support partnerships that advance high-quality professional learning (PL) services that support implementation of high-quality, core instructional materials (HQIM) in ways that are efficacious for student learning and efficient for providers to sustain beyond the grant term. Awards will be made to teams of organizations that can include curriculum authors, PL providers, and/or districts, intermediate units, and schools, represented by a point organization that will receive the grant and distribute funds across the partnership.

This initiative is a part of the larger portfolio of investments that comprise the K-12 Curriculum and Instructional Tools portfolio. This investment specifically relates to the following strategic goal for this portfolio:

- Delivery Capacity: Validate the theory that professional learning service providers can a) demonstrate impact on student outcomes that exceeds that yielded by adoption and use of a high-quality curriculum alone, and b) offer diverse services that fit broader market demand and have the potential for scale.

This investment is part of the “Solutions” portfolio, which in part aims to increase availability of quality solutions for curriculum and instructional tools, awareness of those solutions, and support for efficacious curriculum implementation models that have the potential for scale, with the notion that those three goals will increase usage. However, it does not directly fund scaling usage of products or services. This RFP intends to provide flexible capital to support the development of curriculum-connected professional learning services with promise to yield meaningful student outcomes and offer significant value to districts, schools, and other stakeholders and satisfaction to educators, thus providing attractive solutions that can be sustained independent of philanthropic support. Successful partnerships will support high-quality implementation of core (tier one) instructional materials in one of the following five disciplinary segments: middle school mathematics; high school mathematics; middle school English language arts (ELA); high school ELA; or middle school science.

This RFP is particularly interested in supporting service development and refinement in middle and high schools serving student populations that are at least 50 percent Black, Latino, emerging multilingual or English Learner (EL)-designated, and/or low-income, in California, Florida, Georgia, New York, and North Carolina. Successful applicants proposing projects outside those geographies must submit proposals together with a local education agency serving at least 50,000 students (for more information, see Potential Partnerships and Eligibility, below). However, the Curriculum portfolio is not a place-based strategy and is interested in solutions that can be diffused more broadly.

We believe this investment and others that support this strategic goal will eventually help us significantly increase the number of Black, Latino, EL-designated, and low-income secondary students who earn a high school diploma, enroll in a postsecondary institution, and are on track in their first year to obtain a high-quality credential.

Background

The K-12 Curriculum & Instructional Tools portfolio of the Bill & Melinda Gates Foundation’s United States Program focuses on developing the evidence base to inform best practice design of curriculum and curriculum-specific, coherent instructional systems, in order to support improving the availability and awareness of high-quality curriculum and instructional tools and improving field capacity to implement those tools well to benefit Black, Latino, EL-designated, and low-income students in middle and high school mathematics, English language arts, and middle school science.

A standards-aligned, high-quality curriculum is an essential feature of a coherent instructional system that can maximize its potential benefit. We hypothesize that such a system may consist of the following elements, as well as others:

- A clear, aligned vision for academic improvement, and a process for monitoring progress based on evidence of student learning over time;
• Interim assessments connected to the curriculum’s scope and sequence that provide timely, actionable data about students’ academic strengths and opportunities for growth;
• Curriculum-connected cycles of PL; and
• Discipline-specific coaching and feedback based on tools connected to academic content covered in the curriculum.

This request focuses on curriculum-connected cycles of PL, though PL providers may also offer other elements of the system. Currently, evidence suggests that districts and schools invest significantly in PL with uneven results and satisfaction with service value. Nascent research suggests that PL aligned to curriculum – focused on teaching and learning specific content, and with explicit explanations of curriculum and the rationale behind it – may have more promise for boosting student achievement. However, it can be costly to develop such PL content and secure required licensing and support from curriculum authors or build internal expertise on curriculum to deliver quality implementation services. Moreover, providers must attract partners who may not make procurement decisions based primarily on curriculum alignment or clear, shared definitions of service quality.

A growing number of PL providers are beginning to address these issues by offering services aligned to high-quality curricula such as those identified by EdReports and other providers of third-party quality information. Such PL providers have differentiated themselves in the market based on their substantive expertise as well as their approach to partnering with districts, intermediate units, schools, and other important stakeholders. Some are primarily curriculum authors and provide PL to a handful of large districts willing to go deep with large, intensive investments to fully align their instructional systems with curriculum. Others are providers seeking to offer a mix of higher- and lower-touch services to as broad a customer base as possible. While curriculum-aligned PL providers across these distinct approaches are growing, several key questions about gaps in the market remain:

• What efficient but meaningfully efficacious offerings can help ease persuadable but resource-constrained districts, schools, and stakeholders into curriculum-aligned PL services, while maintaining base quality and opening the door to scaling up PL over time?
• Beyond standards- and curriculum-alignment, what additional dimensions of quality are needed for professional learning content and services to meet both practical and pedagogical customer and user needs for educators serving Black, Latino, EL-designated, and low-income students?
• How can high-quality, curriculum-aligned PL providers design and market their services effectively to compete against lower quality offerings?
• How can content authors, PL providers, and distributors establish sustainable business models for diversified service lines considering the demand and margins for PL services?

Partnerships pose one opportunity for providers to work together to address market needs. They help providers avoid expansion beyond their core expertise and interests in ways that may degrade quality and stretch their business models. They encourage providers to look beyond their immediate circles and work with others who specialize in high-demand but underserved segments of the market. They can also encourage providers to create packages of service offerings that meet the needs of the most districts, schools, and stakeholders as possible, helping them earn shared revenue so services can be sustained independent of philanthropy.

Examples of potential partnership approaches could include:

• Provider collaboration to expand joint offerings: Curriculum authors and PL providers collaborate to modify existing, adult-facing curriculum-aligned PL content to calibrate dosage; to enhance teacher educative features; and/or to provide training that addresses unmet needs of particular student beneficiaries, and curriculum authors certify partner providers to deliver those services
• Provider collaboration to strengthen relationships among independent offerings: PL providers collaborate to refer districts, schools, and other stakeholders to the best providers given the articulated needs of districts, intermediate units, schools, and other stakeholders; geographic distribution; and respective areas of expertise
• Provider and larger LEA collaboration to design solutions: Providers partner with LEA(s) serving at least 50,000 students to develop or tailor PL services within local secondary schools whose student populations are at least 50 percent Black, Latino, EL-designated, and/or low-income to meet stakeholder and student needs without placing undue demand on provider efficiency, while demonstrating that the service model could be scaled to settings of similar size and student demographics

The program seeks to capitalize partnerships that have committed or near-committed customer prospects to support sustained, effective partnerships that deliver on stakeholder needs beyond the term of a grant. Grant awards will be made to a point organization chosen by participating partners, who will then distribute funds among others in the partnership group. We are requesting concept proposals from teams of organizations in response to the request below to inform the selection of partnerships to receive support. Final partnership design would be refined with foundation staff during development of formal proposal documents.

Anticipated Outcomes

We anticipate that these grants will enable PL providers to establish partnerships that fill gaps in the market for curriculum-aligned PL and meet diverse stakeholder and community needs. Primary outcomes will include:

• Evidence of impact on student learning within a grant term of approximately 2.5 years, beyond the impact of adopting high-quality, standards-aligned curriculum alone
• Active and thriving curriculum-aligned PL partnerships that last beyond the grant period and demonstrate sustainable business models for customer acquisition, revenue-sharing, and IP licensing
• New, openly licensed curriculum-aligned PL materials and services that meet the needs of educators serving Black, Latino, EL-designated, and/or low-income students
● Contracts with districts, schools, and other stakeholders to allocate school/district funding to purchase services developed and/or offered through partnerships
● Collection of data on the needs of districts and schools, provider offerings, and implementation successes and challenges that can inform growth of high-quality, curriculum-aligned PL

Scope and Approach

The foundation seeks to help adoption of high-quality, curriculum-aligned PL move beyond early adopters to reach “fast followers” who are mission-driven, value evidence of impact, see curriculum as core school infrastructure that all schools and educators deserve, and believe or can easily come to recognize that a high-quality curriculum and the supports required to use it well are important levers to promote equitable student outcomes.

To help achieve this shift, the foundation seeks to validate the theory that service providers can a) demonstrate impact on student outcomes that exceeds that yielded by adoption and use of a high-quality curriculum alone, and b) offer diverse services that fit broader market demand and have the potential for scale. It believes that three key levers can contribute to this strategic goal:
● Build capacity in district- and school-support organizations to scale curriculum-connected, coherent instructional systems
● Support quality assurance organizations to create ecosystem-level shared expectations around the quality of the features of such systems
● Create opportunities for new partners and partnerships to demonstrate demand for curriculum implementation services

Expected awards and timing:
We expect to make grants in support of six to ten partnerships. No award to an individual partnership will exceed a total of $1 million over approximately 2.5 years. We anticipate that service delivery would begin in School Year 2019-2020, with activities launching in the preceding summer, and conclude in School Year 2020-2021, followed by additional data collection.

Primary learning questions:
The primary goal of this request is to support new partnerships that demonstrate demand for curriculum implementation services, particularly in California, Florida, Georgia, New York, and North Carolina. Successful applicants proposing projects outside those geographies must submit proposals together with a local education agency serving at least 50,000 students. As a result, the foundation encourages teams to bring forward creative proposals that 1) seek to address the needs of middle and high schools serving at least 50 percent Black, Latino, EL-designated, and/or low-income students; 2) seek to address gaps in the PL market, especially with respect to efficacy, affordability, and adoptability, and 3) help participating providers solve business challenges in mutually beneficial ways. To that end, teams should be comprised of partners with aligned visions and differentiated services, who are eager to work together voluntarily. When possible, districts, schools, and other stakeholders may be included in teams to illuminate natural demand for a wider variety of service offerings and to support sustainable stakeholder contracts. Each team must have a designated point organization that will receive the grant and then allocate funding across partners.

At the same time, lessons from the partnerships about what districts, schools, and other stakeholders need and are willing to purchase, and what providers can feasibly offer, will help answer learning questions such as:
● Are there sufficient effective implementation service providers that meet characteristics of quality?
● What are the criteria that drive selection of professional learning services by districts and schools?
● How can high-quality, curriculum-connected professional learning services become more competitive in the market for externally contracted professional learning services?
● What are the characteristics of effective curriculum implementation services, especially for schools serving Black, Latino, low-income, and EL-designated students?
● What are the differences between student- and school-level outcomes when 1) high-quality curricula are adopted and used, and 2) when high-quality curricula are adopted and used together with high quality implementation services?
● How can PL providers ensure that PL services are available and accessible at an affordable price for Black, Latino, EL-designated, and/or low-income students?

Defining outcomes and impact:
Partners will be asked to report on the following outcomes and dimensions of impact, some of which may be more or less relevant depending on the nature of the proposed partnership. The specific measures of these outcomes, especially the Levers of Change and Student Impact outcomes, will be co-created in collaboration with a research and technical assistance partner (see below) to ensure that individual partners can learn about their own impact and the field can gain a broader set of learnings around how effective curriculum implementation services drive changes for educators and students.

● Sustainability
  ○ Partnership sustainability: Stability of the partnership beyond the grant period, including agreed-upon business terms and mutual interest in continuing the partnership
  ○ Market share: Growth in contracts, including expansions of existing contracts and new contracts, ideally compared to growth among competitors offering services that are not curriculum aligned
  ○ Provider capacity: Added marketing expertise, delivery capacity, and business planning expertise for individual providers within the partnership and across the partnership as a whole
- **Stakeholder leads**: Identified interest from new districts, schools, and other stakeholders who have previously not purchased PL aligned to high-quality curriculum, and satisfaction of existing districts, schools, and other stakeholders

- **Levers of Change**
  - **PL content**: New curriculum-aligned PL content (built/modified from existing content) to support PL implementation
  - **Implementation**: Lessons learned through implementation challenges and successes with districts, schools, and individual educators
  - **Educator Development**: Changes in the knowledge, attitudes, and behavior of educators as a result of services received
  - **Stakeholder Satisfaction**: Stakeholders report value in services rendered

- **Student Impact**
  - **Behavior Change**: Impact of PL services on student behavior in classrooms (e.g., engagement, quality of student work)
  - **Learning Outcomes**: Impact of PL services on student learning, ideally beyond the impact of adopting high-quality, standards-aligned curriculum alone
  - **Target Population**: Disaggregated data showing adoption by and learning outcomes for districts, schools, and other stakeholders who serve at least 50 percent Black, Latino, EL-designated, and/or low-income students

As part of this work, partnerships will be asked to work with a research and technical assistance partner to design data collection and analysis on leading and lagging indicators of successful service design, implementation, and impact on educators and students. Partnerships will also receive technical assistance in the use of efficacy data and analysis generated by the research to refine service design and delivery. Award recipients would be asked to engage with the research partner before the work with schools begins in SY 2019-2020, so that the design of the services can be informed by the measurement plan, and vice versa.

**Digital networks capacity building**

This RFP includes the opportunity for winning partnerships to receive support to develop and manage a digital, peer-to-peer community of teachers. The community provides teachers with opportunities to collaborate, exchange best practices and receive support from peers, in service of improving classroom implementation. Additionally, the peer community will provide partnership with real-time insights on teacher needs that can improve delivery. Specifically, partnership will leverage expertise and insights from Teacher2Teacher, a community of 1.5 million teachers that has developed best practices in content creation, community management, and insight generation.

## Rules & Guidelines

### Eligibility

**Qualified teams of organizations will have:**

- **Existing curriculum-aligned products and services** that have been tested and used in schools for at least two school years with a track record of success achieving learning gains for Black, Latino, EL-designated, and low-income students, and which can be modified and built upon in the partnership
- **Previous districts, schools, and other stakeholders** that validate demand for and benefits of existing products and services
- **Qualitative and/or quantitative data** about stakeholder needs and preferences on which their hypotheses for partnership opportunities are based
- **Commitment to and experience working with schools** that serve high percentages of Black, Latino, EL-designated, and low-income students
- **Headquarters in, or the ability to provide services in, California, Florida, Georgia, New York, or North Carolina**; services proposed for project support through this RFP must be tested in schools serving at least 50 percent Black, Latino, EL-designated, and/or low-income students
- **If outside of these states**, successful applicant partnerships must include LEA(s) serving at least 50,000 students, and proposed services must be tested in schools serving at least 50 percent Black, Latino, EL-designated, and/or low-income students.

**Qualified teams of organizations will:**

- **Have a point organization** designated as the contact and grant-receiving lead for the project, and a point person or team that will lead the work
- **Have alignment from all organizations implicated in the proposal**
- **Have sufficient personnel and capacity** throughout the duration of the grant to perform the scope of work, or a plan to build sufficient capacity
- **Have committed or very likely districts, schools, and other stakeholders** interested in the proposed partnership offerings, and a marketing plan to acquire districts, schools, and other stakeholders
- **Commit to the foundation’s Global Access commitments** (see below)
We will consider funding for teams including:

- Teams that include multiple providers with sufficient experience and either sufficient existing capacity or a plan to build sufficient capacity
- Teams that include stakeholder(s) (e.g., LEAs, intermediate units, schools) seeking to address a particular need, preferably contributing co-funding, and provider(s) with sufficient experience, and either sufficient existing capacity or a plan to build that capacity
- Teams with the ability to test proposed services in more than one school; proposals to test services in a single school will not be considered

**Eligible curriculum titles for aligned professional learning services**

PL partnerships eligible for this opportunity must be aligned to one curriculum title meeting the following criteria:

- Cover a full grade band of middle or high school mathematics or English language arts, or middle school science
- Mathematics and ELA titles must submit an EdReports review, or must be reviewed by a third party using either the appropriate EdReports review instrument or the Instructional Materials Evaluation Toolkit. A description of the third-party review process must accompany the review of the title itself
- Middle school science titles must be aligned to Next Generation Science Standards (NGSS) and submit either an EdReports review, or must be reviewed by a third party using the NextGen TIME suite of tools. A description of the third-party review process must accompany the review of the title itself
- Support for projects in middle school science will only be considered from California, or on a case-by-case basis should partnerships be proposed including LEA(s) serving at least 50,000 students within states that have adopted the Next Generation Science Standards

All team proposals should be for new or meaningfully expanded partnerships. Organizations that have previously partnered with each other are eligible if this proposal is for a substantially new or expanded line of work that is scalable to other districts, schools, and other stakeholders by design.

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**Application Guidelines**

In your application, please address the following:

**Background of Partners**

- Briefly describe PL providers participating in the partnership, including:
  - Previous work partners have done related to curriculum-aligned professional learning
  - Partners’ primary goals and expertise
  - Partners’ major products and services offered and in development
  - Partners’ current and past districts, schools, and other stakeholders, and ability to support districts, schools, and other stakeholders in California, Florida, Georgia, New York, or North Carolina
  - Indicators that partners’ previous work has achieved learning gains for Black, Latino, EL-designated, and/or low-income students
- Briefly describe the relationship between partners (e.g., any previous joint work, membership in networks, mutual districts, schools, and other stakeholders, etc.)

**Partnership goals**

- In this section, please describe the goals for the partnership, including:
  - The districts’, schools’, and stakeholders’ needs the partnership seeks to fulfill, evidence of those needs, and context on current gaps in the market related to that need
  - The mutually agreed-upon goals for the partnership and principles that will guide the work
  - The curriculum to which PL content and services will be aligned, together with evidence of the quality of the title(s)

**Partnership activities**

- In this section, please describe the proposed partnership arrangement, including:
  - Geographies the partnership expects to target, particularly in California, Florida, Georgia, New York, or North Carolina
  - The stakeholders the partnership aims to reach, including the purchasing agents to whom the products and services will be marketed, and the level of educators (e.g., classroom teachers, school leaders, school or district instructional leads and coaches, district leaders) targeted by the interventions
  - The service model the proposed project would enhance, refine, test, or otherwise improve to meet the needs of specified students, schools, districts, and other stakeholders. The content and/or services each partner provider will offer and how they differ from what the provider would offer acting outside of a partnership
  - Experience in professional learning services to help teachers provide high-quality instruction in Math and ELA core curriculum that addresses the needs of students with high incidence disabilities (e.g., learning and attention issues)?

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The timeline for development of content and the approach; marketing to districts, schools, and other stakeholders; implementation; and evaluation. Partnerships will ideally begin implementing services with districts, schools, and other stakeholders by School Year 2020-2021.

The resources and activities partners will use to build capacity to execute their roles in the partnership

**Stakeholders**
- Please identify likely stakeholders (districts, networks of schools, CMOs, states, or other configurations serving predominantly Black, Latino, EL-designated, and low-income students) who will purchase services designed and offered through this partnership. These could include a provider’s existing customer who will purchase new services from a partner; an existing stakeholder who will purchase expanded services; or a stakeholder new to all providers in the partnership. In this section, please:
  - Provide a brief overview of the priority interest of districts, schools, and other stakeholders
  - Explain why they are likely to purchase from the partnership
  - Describe how they serve Black, Latino, EL-designated, or low-income students

**Partnership terms**
- In this section, please describe the proposed business arrangements for the partnership. If exact terms are not yet decided, please describe potential arrangements under discussion and remaining issues to be addressed before terms are finalized. Key questions include:
  - What will be the revenue-sharing model for participating providers?
  - What will be the IP arrangements for materials modified or developed under the partnership and for pre-existing materials used in partnership activities? How will Global Access commitments (see description below) be determined and managed?
  - What will the contract arrangement be between providers within the partnership? Who will be the grant-receiving point organization, and how will they distribute funds across partners? What will the contract arrangement be with districts, schools, and other stakeholders?
  - How will the responsibilities and division of labor be structured among the partnership?
  - What are the planned business terms for how providers will collaborate after the grant period?
- If there is any added expertise and/or capacity that you may need to help develop a sustainable partnership business model, please describe the key questions and resources partners need.

**Partnerships**
- Briefly describe your team’s experience and expertise to meet the following criteria:
  - Designing PL content and/or services and implementing PL services with schools, particularly curriculum-aligned PL
  - Working with schools that serve high percentages of Black, Latino, EL-designated, and low-income students
  - Creating business plans to enable sustainable growth
  - Partnering with other PL providers and/or districts, schools, and other stakeholders to offer new or customized products and services
  - Measuring the impact of PL services on student learning
- Please briefly describe your team’s approach to integrating diversity, equity, and inclusion into your work.

**Budget**
Please describe the proposed use of funds against major project activities as a percentage of the overall request. In addition, indicate the breakdown of funds allocated to each organization in the applying partnership. Describe the amount and source(s) of complementary funding.

**Review Criteria**

Concept proposals will be evaluated against the following criteria:

**Team fit & alignment**
- Alignment of the goals of the partnership with the experience and expertise of the project team
- Demonstrated experience with and understanding of the challenges of and opportunities in providing PL services to educational systems serving predominantly Black, Latino, EL-designated, and low-income students
- Team’s general approach to integrating diversity, equity, and inclusion into their work

**Partnership feasibility**
- Likelihood of establishing a sustainable partnership that can thrive beyond the grant term in response to natural stakeholder demand
- Likelihood that the partnership can successfully deliver the proposed services within the timeframe specified
- Likelihood that the partnership can successfully deliver the proposed services within the budget and staffing specified

**Partnership value**
- Likelihood that a grant will enable or significantly expedite activities that would otherwise not occur or occur slowly in the market
- Likelihood that the partnership will result in meeting both practical and pedagogical stakeholder needs related to Black, Latino, EL-designated, and low-income students, and in the solution being scaled beyond the grant term
- Likelihood that the partnership will establish a successful business approach that can serve as a model for the field
- Likelihood that the partnership will result in actionable lessons that can shape investment approaches and work with the field

### Activities and Timeline

**January 7, 2019**: Open RFP  
**March 8, 2019**: Deadline for submitting applications  
**April 15 - 16, 2019**: Interviews via video conference  
**May 2019**: Award(s) announced

All dates are estimates and are subject to change in the sole discretion of the foundation.

### How to Submit a Proposal

#### Response Requirements

Applicants must first submit an application.

To apply, please complete the application that addresses the topics described in the “Application Guidelines” section above. To submit a response, click here.

After the application review, a select number of partnership finalists will be invited to interview via video conference.

Awards will be announced in May 2019. A full proposal will then be co-developed with the foundation.

#### Submission Instructions

Please adhere to the following instructions when responding to this RFP:

- Apply via the online application form by 5:00 pm, Pacific Time, March 8, 2019.
- To register for an optional, informational webinar, click here.
- All communication relating to the RFP, including questions and clarifications should be submitted via email to ProfessionalLearningPartnerships@gatesfoundation.org.
- All questions must be answered to be considered for work pursuant to this RFP.
- Consultants or their representatives may not contact anyone else within the foundation regarding this RFP. Any violation of this requirement may result in disqualification from the selection process.
- Questions submitted by any consultant and associated responses may be distributed to all consultants.

### More Information

#### Key Terms and Conditions

**A. Disclosure Notice**

To help the foundation with its review of RFP responses, the foundation may disclose proposals, documents, communications, and associated materials submitted to the foundation in response to this RFP (collectively, “Submission Materials”) to its employees, contingent workers, consultants, independent subject matter experts, and potential co-funders. Please carefully consider the information included in the Submission Materials. If you (the “Applicant”) have any doubts about the wisdom of disclosure of confidential or proprietary information, the foundation recommends you consult with your legal counsel and take any steps you deem necessary to protect your intellectual property. You may wish to consider whether such information is critical for evaluating the submission or if more general, non-confidential information may be adequate as an alternative for these purposes.

Notwithstanding the Applicants characterization of any information as being confidential, the foundation is under no obligation to treat such information as confidential.

**B. Disclaimer**
This RFP is not an offer to contract or award grant funds. The foundation assumes no responsibility for the Applicants cost to respond to this RFP. All responses generated by this RFP become the property of the foundation.

C. Release and Verification

In exchange for the opportunity to be awarded a grant or contract, the Applicant agrees that the foundation may, in its sole discretion: (1) amend or cancel the RFP, in whole or in part, at any time; (2) extend the deadline for submitting responses; (3) determine whether a response does or does not substantially comply with the requirements of the RFP; (4) waive any minor irregularity, informality or nonconformance with the provisions or procedures of the RFP; (5) issue multiple awards; (6) share responses generated by this RFP with foundation staff, consultants, contingent workers, subject matter experts, and potential co-founders; and (7) copy the responses.

Applicant agrees not to bring a legal challenge of any kind against the foundation relating to the foundation’s selection and award of a grant or contract arising from this RFP.

Applicant represents that it has responded to the RFP with complete honesty and accuracy. If facts provided in Applicant’s response change, Applicant will supplement its response in writing with any deletions, additions or changes within ten days of the changes. Applicant will do this, as necessary, throughout the selection process. Applicant understands that any material misrepresentation, including omissions, may disqualify it from consideration for a grant or contract award.

By responding to this RFP, you are representing: (i) that you have authority to bind the named Applicant to the terms and conditions set forth above, without amendment; and (ii) that you agree to be bound by them.

D. Global Access and Intellectual Property

Intellectual property (IP) rights and the management of IP rights are likely to play an important role in achieving the goals of this project. To this end, the foundation requires that, even at this stage, all applicants seriously consider their willingness to submit a response in compliance with the foundation’s response requirements, a portion of which may ask for certain information and intentions regarding intellectual property concerns and Global Access. Specifically, the foundation requires that;

You will conduct and manage the Project and the Funded Developments in a manner that ensures Global Access. Your Global Access commitments will survive the term of the Agreement. “Funded Developments” means the products, services, processes, technologies, materials, software, data, other innovations, and intellectual property resulting from the Project (including modifications, improvements, and further developments to Background Technology). “Background Technology” means any and all products, services, processes, technologies, materials, software, data, or other innovations, and intellectual property created by You or a third party prior to or outside of the Project used as part of the Project. “Global Access” means: (a) the knowledge and information gained from the Project will be promptly and broadly disseminated; and (b) the Funded Developments will be made available and accessible at an affordable price (i) to people most in need within developing countries, or (ii) in support of the U.S. educational system and public libraries, as applicable to the Project.

The foundation will be selecting applicants based on the conclusion that their technologies and expertise will be most appropriate for the success of this RFP.

As part of the foundation’s review and evaluation of each response, the foundation will conduct due diligence with respect to each applicant’s ability and commitment to manage intellectual property in a manner consistent with the stated scientific and charitable goals of the foundation. Due diligence activities may include inquiry into an applicant’s:

1) Freedom to operate (FTO) and ability to freely use and acquire needed background technology;

2) Commitment to promote the utilization, commercialization and availability of Funded Developments for public benefit

The foundation encourages you to include this information in your response.

About the Bill & Melinda Gates Foundation

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. We work with partners worldwide to tackle critical problems in five program areas. Our Global Health Division aims to reduce inequities in health by developing new tools and strategies to reduce the burden of infectious disease and the leading causes of child mortality in developing countries. Our Global Development Division focuses on improving the delivery of high-impact health products and services to the world’s poorest communities and helps countries expand access to health coverage. Our Global Growth & Opportunity Division focuses on creating and scaling market-based innovations to stimulate inclusive and sustainable economic growth. Our United States Division works to improve U.S. high school and postsecondary education and support vulnerable children and families in Washington State. And our Global Policy & Advocacy Division seeks to build strategic relationships and promote policies that will help advance our work. Our approach to grantmaking in all five areas emphasizes collaboration, innovation, risk-taking, and, most importantly, results.

Updated information that accounts for the creation of the Global Growth & Opportunity Division.

To learn more about the foundation's work, visit www.gatesfoundation.org.