

# **Education** Design Lab



Design Challenge 2017-19

Information Packet & Request for Proposals (RFP)



## CONTENTS

Executive Summary.....	1
The Seamless Transfer Pathway Design Challenge.....	1
The Design Challenge Process.....	1
Who Gets to Participate?.....	2
Key Benefits for Participants.....	2
Expectations for Participating Institutional Partners.....	3
What is this Going to Cost my Institution?.....	4
Key Dates & Challenge Milestones.....	4
Request for Proposals (RFP) .....	5
Instructions.....	5
A. General Information.....	5
B. Vision for Seamless Transfer Pathways.....	7
C. Institutional Mission and Goals.....	9
Four-Year Institution.....	10
D. Leadership and Governance for Initiatives between Institutions .....	10
E. Stakeholder Engagement.....	11
F. Institutional Readiness & Track Record .....	11
G. Key Performance Indicators/Targets.....	13
H. Design Challenge Commitment.....	14
APPENDIX .....	15
A. Key Performance Indicators & Definitions .....	15
B. Baseline Performance Indicator Template.....	16

## EXECUTIVE SUMMARY

Research shows that 80 percent of students who enroll in one of our nation’s community colleges every year express an intent to complete a bachelor’s degree at a four-year institution. Yet, in the end, only 25 percent make the leap to a four-year school within five years, and only 17 percent complete a four-year degree within 6 years of transferring<sup>1</sup>. This is a national failure. In an economy where the lifetime earnings premium for four-year degree holders is still over \$1 million compared to a high school graduate (\$500,000 more than an associate degree) and nearly three quarters of new jobs created since 2008 have gone to bachelor’s degree holders<sup>2</sup>, the need to support more students in their attainment goal is more critical than ever.



IMAGE SOURCE: CCRC, 2015

Developing more “seamless” transfer pathways between community colleges and four-year institutions is one key to improving those attainment rates. Many discrete interventions have been tested and validated over the past decade; it’s time to look at how combining these and other concepts into a single multi-faceted intervention, grounded in the student experience, can drive dramatic change in attainment rates.

### The Seamless Transfer Pathway Design Challenge

The Seamless Transfer Pathways Design Challenge is a structured, student-centered design-innovation process led by the [Education Design Lab](#) made possible by a generous grant from the Michael & Susan Dell Foundation. Participants selected to participate in this intensive 12-month engagement will be led through a four-stage innovative process to design, implement, and scale “seamless transfer pathway” solutions to dramatically improve transfer and graduation rates for community college students aspiring to attain a four-year degree. The challenge includes a rigorous evaluation component to help participating institutions track outcomes through the pilot year and over an additional five-year period.

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**Design Question:** *How might community colleges and four-year universities dramatically improve transfer and baccalaureate attainment rates by reframing the end-to-end experience from the student’s point-of-view?*

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### The Design Challenge Process

Institutions selected to participate in the Design Challenge will get hands-on guidance and support to design, implement, and evaluate their own “seamless transfer pathway” solution to best address the challenges faced by two- and four-year institutions today.

Over the course of the 12-month challenge, selected IHE Pairs will participate in a variety of activities, sessions, and convenings that take them through the four-phased process designed to position the institutions towards

<sup>1</sup> Davis Jenkins and John Fink *What We Know About Transfer*, Community College Research Center, <https://ccrc.tc.columbia.edu/media/k2/attachments/what-we-know-about-transfer.pdf> (January 2015).

<sup>2</sup> Anthony P. Carnevale, Stephen J. Rose and Ban Cheah, *The College Payoff, Education, Occupations, Lifetime Earnings*, The Georgetown University Center on Education and the Workforce, <https://cew.georgetown.edu/cew-reports/the-college-payoff/> (August 2011).

transformative changes. This process includes thorough guidance through the Design Thinking process as well as change management support, faculty and stakeholder engagement, and co-design and co-creation support. A mixed model of campus visits and cohort convenings was deliberately designed to help institutions share best practices and ultimately expand and share learnings and experiences across the cohort and beyond.

At the end of the 12-month design challenge, each IHE Pair needs to be ready to pilot a Seamless Transfer Pathways “prototype” designed to increase transfer, success, retention, and completion for entering students. The models may well differ from one pair of institutions to another. Some may choose pilots to address certain demographic groups, others to build on previous work toward integration of services and curriculum. Each IHE Pair will be equipped with a comprehensive design brief, implementation & launch plan, and evaluation plan. The project is also funding ongoing monitoring and reporting of the evaluation to help IHEs track outcomes over an additional five-year period following the pilot year.



## Who Gets to Participate?

The Lab is overseeing an RFP process that will commence on **May 16th, 2017** and close on **June 30th, 2017**. Invitations to selected institutions will be issued in August 2017. The RFP should be completed by an “IHE Pair” consisting of one two-year accredited institution and one four-year accredited institution<sup>3</sup>. Proposals will require joint commitments from a two year and four-year institution willing to work together to develop cross-boundary solutions. Expectations for participating institutional partners are listed [below](#). Final decisions will favor pairs of institutions ready to dramatically push the envelope in approaches to improving bachelor’s attainment for community college students. The Lab will be looking for potential partner colleges whose institutional vision, mission, and goals align with that of the project, including demonstrations of institutional readiness and a track record for transformational efforts. Established articulation agreements are a requirement and evidence of joint projects will be highly valued.

## Key Benefits for Participants

By leveraging a design-innovation process we believe institutions will be able to design and test new models that are grounded in the student experience, reach across institutional silos to solicit engagement and buy-in, rapidly iterate based on evidence and learning along the way. Institutions selected to participate in the Design Challenge will receive the following:

1. Participation in a year-long structured design process led by higher education design specialists from the Education Design Lab and its [Innovator Network](#). This includes access to two dedicated design support professionals shared among the institutional teams participating in the cohort to provide ongoing design coordination and support for the duration of the engagement.
2. Access to Subject Matter Experts (SME’s) curated by the Lab Team to meet the specific needs of the design challenge participants throughout the engagement. Topics may include: stakeholder engagement to prioritize transfer outcomes, brand and value proposition development to help streamline and prioritize initiatives, financial modeling for potential shared services, as well as articulation agreement best practices, guided pathways and student coaching strategies.
3. A Team Coach to work with your team on designing and implementing a multi-faceted intervention: Each IHE Pair will be provided a Team Coach who will guide the participants through the 12-month Design Challenge,

<sup>3</sup> Systems or multiple two/four year institutions interested in applying as one “Pair” **may** be considered. Please contact us directly to discuss.



be available at sessions and for bi-weekly calls, and—most importantly—serve as a thought partner in pushing teams to maximize possibilities.

4. All expenses paid participation for six team members (2-4 from each institution) in three national cohort convenings to work in tandem with leaders from six other institutions from around the country.
5. Three on-campus design sessions for up to 30 college administrators led by the Education Design Lab.
6. Positioning as market leader in higher education innovation through media opportunities and conference panel participation.

## Expectations for Participating Institutional Partners

Each IHE Pair selected for this Design Challenge represents a team of high-potential institutions (one two-year accredited institution and one four-year accredited institution) dedicated to addressing transfer pathways transformation. In addition to driving towards piloting a new Seamless Transfer Pathway, the IHE pairs are expected to work together for the duration of the Design Challenge and adhere to the following activities:

1. ***A joint working group between a two-year and four-year institution.*** Work with identified partner institution to design, pilot and scale over the evaluation period (2018-2024) one or more [innovations](#) that respond to the needs of significant student demographic groups struggling to succeed, transfer and graduate from a four-year institution.
2. ***Commitment to a goal of 30% growth in bachelor attainment.*** Institutions should be comfortable striving for an explicit goal to increase bachelor's completion for transfer students by 30 percent within the six-year window being evaluated (2018-2024).
3. ***Commitment of school teams to participate in two off-site national convenings and three on-site design sessions during the 2017-18 school year.*** This includes:
  - a. Attending two convenings with the other IHE Pairs (dates and locations to be determined, travel and lodging will be reimbursed) during the 2017-18 school year;
  - b. Attending and/or hosting three on-site Design Sessions for the IHE Pair (dates to be determined, location will be on-site at yours or your partner institution's campuses); and
  - c. Attending a third national convening with other IHE Pairs during the 2018-19 pilot year (date and location to be determined; travel and lodging will be reimbursed).
4. ***Fully participate in the Seamless Transfer Pathways Learning Community*** including:
  - a. Willingness to launch a significant pilot program that dramatically pushes the envelope for entering community college students in fall 2018;
  - b. Willingness to allow evaluation of the cohort outcomes until 2024;
  - c. Ongoing knowledge sharing within the design challenge cohort as well as with a broader learning community focused on development and scaling seamless transfer pathways. Knowledge sharing activity can include, but is not limited to blogs, webinars, one-pagers communicating lessons learned, key findings, aggregated data reports, etc.; and
  - d. Participate in timely data collection activities leading to aggregation and use of baseline and on-going data to inform strategy and practice. This includes tracing, analyzing and annually submitting mandatory key performance indicators (See [Appendix A](#)).
5. ***Maintain involvement at presidents' level and demonstrate commitment*** to keep a broad set of stakeholders involved in the design process.
6. ***Identify primary points of contacts***, as well as additional support staff, from each institution for the duration of the engagement and promote and respond to the importance of scheduling meetings quickly.



## What is this going to cost my institution?

All costs for the Design Challenge—travel, hotel accommodations, coaches, access to experts, planning support—will be covered by the Education Design Lab, through the generous support of the Michael & Susan Dell Foundation. Costs to implement a pilot must be covered by the institutions.

## Key Dates & Challenge Milestones

<b>Application &amp; Selection</b>	
June 30, 2017	Joint Application Due (One Application per IHE Pair)
July 1-July 31, 2017	Application Review & Scoring (Lab/MSDF - Rolling)
August 15, 2017	Interviews Completed
August 15, 2017	Lab/MSDF Review & Final Selection
August 7-August 11, 2017	Notification to IHE Pairs & Calendaring Sessions
August 30, 2017	MOUs Signed between IHE Pairs and the Education Design Lab

<b>Design Challenge Sessions</b> (Dates will be scheduled during the August Calendaring Sessions)	
September 2017	Design Challenge Start
September-October 2017	Initiation Call with IHE Pairs and Design Team (Lab & Coach)
October 2017	Convening: Kick-off, Design Question, and Design Criteria
December 2017-January 2018	On-site: Galley Walk & Ideation
February 2018-March 2018	On-site: Prototyping I (Rapid Prototyping)
May 2017	Convening: Prototyping II (Provocateurs)
July 2018-August 2018	On-site: Implementation Planning
June 2019	Convening: Knowledge Sharing & Pilot Iteration

<b>Data Reporting* Schedule</b>	
June 2017-September 2017	Baseline Data Collection
June 2019-23	Data Report Due Annually
June 2024	Final Data Report

\*Data baseline/reports will be submitted via online reporting form.

**ABOUT THE LAB** The Education Design Lab is a 501c3 non-profit consultancy that helps design, test, and implement new post-secondary models that address the rapidly changing economy and emerging technology opportunities. We strive to demonstrate where technology, learning science, rigor and design can improve opportunity for learners and incumbent workers who are struggling in any way (affordability, access, relevance) to maximize their potential in the current post-secondary system.

We bring the latest in design and innovation tools, and a team of educators, designers and innovators, to identify the best solutions for our partners. We work across disciplines and sectors with entrepreneurs, innovators, institutions, non-profits, foundations and corporations. We bring significant experience managing national and local learning cohorts, working with organizations such as The Lumina Foundation, UNCF, American Council on Education, Credly, and the Academy for Innovative Higher Education Leadership.



## REQUEST FOR PROPOSALS (RFP)

### Instructions

The Education Design Lab (“Lab”) is seeking proposals from Institutions of Higher Education (“IHE”) Pairs to participate in Seamless Transfer Pathway Design Challenge, funded by the Michael & Susan Dell Foundation (“MSDF”).

Each IHE Pair will consist of one two-year accredited institution and one four-year accredited institution and should submit **one joint application**.

#### Application Submission

Please submit this completed application no later than **Friday, June 30, 2017 at 5 PM PST/8 PM EST**.

All applications should be submitted as a PDF, Word, and Excel document (data only). Please note that late or incomplete applications will not be considered and will be removed from consideration.

Any questions, comments, or completed applications packages should be emailed directly to **Binh Thuy Do** at [SeamlessTransfer@eddesignlab.org](mailto:SeamlessTransfer@eddesignlab.org).

### A. General Information

Please provide the following information for each of the institution.

#### Two-Year Institution

<b>Required</b>	
Institution Name	
City, State	
President	
Seamless Transfer Pathways Sponsor* (Name, Title)	
Sponsor Email	
Sponsor Phone	
<b>Optional</b>	
Assistant	
Assistant Email	
Assistant Phone	



Please list any other anticipated support staff or team member from your organization. (Please include Name, Title, Contact Info)	
Organizational Chart	Please attach document or provide link here.

*\*The Seamless Transfer Pathways Sponsor is the program lead or primary point of contact of the duration of the design challenge.*

### Four-Year Institution

<b>Required</b>	
Institution Name	
City, State	
President	
Seamless Transfer Pathways Sponsor* (Name, Title)	
Sponsor Email	
Sponsor Phone	
<b>Optional</b>	
Assistant	
Assistant Email	
Assistant Phone	
Please list any other anticipated support staff or team member from your organization. (Please include Name, Title, Contact Info)	
Organizational Chart	Please attach document or provide link here.

*\*The Seamless Transfer Pathways Sponsor is the program lead or primary point of contact of the duration of the design challenge.*

**Articulation Agreements.** An IHE Pair consists of an accredited four-year institution and an accredited two-year institution with an existing articulation or transfer agreement(s) between the schools (must be active and verifiable by the start of the Design Challenge, September 2017).

Articulation or Transfer Agreement(s) currently exist?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do the articulation agreement(s) guarantee junior status for transfer student?	<input type="checkbox"/> Yes <input type="checkbox"/> No





<p>Please attach or provide link to an existing articulation agreement between your two institutions.</p>	
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**B. Vision for Seamless Transfer Pathways**

**Overall Vision for Transfer** - What would a Seamless Transfer Pathways program mean to your institutions or the students you serve? Describe the IHE Pair’s vision for this partnership to dramatically improve transfer and graduation rates. What are your joint goals and objectives? What benefits do you envision? Why is this important? Or Are there particular student populations you hope to target?

<p><b>Joint Statement</b></p> <p><i>Note: This statement should be prepared jointly by the IHE Pairs for purposes of this Design Challenge. (500 words or less)</i></p>	
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# Seamless Transfer

P A T H W A Y S

## Two-Year Institution

<p>What one big thing would you design differently at <b>your institution</b> to improve the likelihood of bachelor's completion for community college students. <i>(250 words or less)</i></p>	
<p>What one big thing would you design differently at <b>your partner institution</b> to improve the likelihood for bachelor's completion for community college students. Why is it hard to make that change? What stands in the way? <i>(250 words or less)</i></p>	

## Four-Year Institution

<p>What one big thing would you design differently at <b>your institution</b> to improve the likelihood of bachelor's completion for community college students. <i>(250 words or less)</i></p>	
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# Seamless Transfer

P A T H W A Y S

<p>What one big thing would you design differently at <b>your partner institution</b> to improve the likelihood of bachelor's completion for community college students. Why is it hard to make that change? What stands in the way? <i>(250 words or less)</i></p>	
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## C. Institutional Mission and Goals

### Two-Year Institution

<p><b>Mission/Goal Alignment</b></p> <p>How do you see this project fitting into your overall work at your respective colleges? How does it specifically further student success work you have already implemented? <i>(500 words or less)</i></p>	
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**Four-Year Institution**

<p><b>Mission/Goal Alignment</b></p> <p>How do you see this project fitting into your overall work at your respective colleges? How does it specifically further student success work you have already implemented? <i>(500 words or less)</i></p>	
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**D. Leadership and Governance for Initiatives between Institutions**

<p><b>Management &amp; Administration</b></p> <p>For each institution, please identify the individual(s) who is responsible for the management, and/or administration under which a “seamless transfer pathway” initiative and/or services will operate.</p>	<p>Two-Year Institution <i>(100 words or less)</i></p>
	<p>Four-Year Institution <i>(100 words or less)</i></p>

## E. Stakeholder Engagement

<p><b>Current Stakeholders</b></p> <p>Who are the primary stakeholders in designing and driving a new transfer pathway? How will you drive comprehensive engagement across these internal and external communities?</p>	Two-Year Institution (200 words or less)
	Four-Year Institution (200 words or less)

## F. Institutional Readiness & Track Record

<p><b>Working Relationship</b></p> <p>Please describe the working relationship or partnerships between your institutions including any recent (past 5 years) or existing joint projects, initiatives or programs in this domain (transfer pathways or undergraduate student success related to transfer pathways).</p> <p><i>Note: This should be prepared jointly by the IHE Pairs for purposes of this Design Challenge. (300 words or less)</i></p>	
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# Seamless Transfer

P A T H W A Y S

<p><b>Ongoing Partnership</b></p> <p>How will your institutions sustain this partnership beyond the initial 12-Month Design Challenge and Pilot Year?</p> <p><i>Note: This should be prepared jointly by the IHE Pairs for purposes of this Design Challenge. (300 words or less)</i></p>	
<p><b>History of Transformative Efforts</b></p> <p>Please describe any completed (past 5 years) or existing student success or other transformation projects that describes your institution's ability to drive change on your campus.. What compelled this work? What was the result? What hasn't worked as well as you hoped.</p>	<p>Two-Year Institution (200 words or less)</p>
	<p>Four-Year Institution (200 words or less)</p>
<p><b>Risks &amp; Challenges</b></p> <p>What concerns do you have about the success of this project?</p>	<p>Two-Year Institution (200 words or less)</p>

	Four-Year Institution (200 words or less)
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## G. Key Performance Indicators/Targets

<p><b>Key Performance Indicators/Targets</b></p> <p>Who is responsible for tracking performance indicators/targets, key deadlines, evaluation tools, outcomes at each institution?</p>	Two-Year Institution (100 words or less)
	Four-Year Institution (100 words or less)
<p><b>Key Performance Indicators Baseline Data</b></p> <p>See <a href="#">Appendix A</a> for Key Indicators &amp; Definitions. You can also download a data template <a href="#">HERE</a>.</p>	<p>Please provide the following data for each of the institution.</p> <p>For Two-Year Partner</p> <ul style="list-style-type: none"> <li>• Overall Enrollment (FTE)</li> <li>• First-Gen Students</li> <li>• High Needs Students</li> <li>• Graduation Rate</li> <li>• Transfer-Out Rate</li> <li>• First-Gen Transfer Out Rate</li> <li>• High-Needs Transfer Out Rate</li> <li>• Transfer Out to Partner Institution Rate</li> </ul> <p>For Four-Year Partner</p> <ul style="list-style-type: none"> <li>• Overall Enrollment (FTE)</li> <li>• First-Gen Students</li> <li>• High-Needs Students</li> <li>• Graduation Rate</li> <li>• Transfer-In Student Graduation Rate</li> <li>• First-Gen Completion Rate</li> <li>• High-Needs Completion Rate</li> <li>• Partner Institution Transfer-In Graduation Rate</li> </ul>



## H. Design Challenge Commitment

By signing and submitting this application, you are indicating that you have read and understand the [Expectations for Participating Institutional Partners](#) and will commit to these expectations if selected to participate in this Design Challenge.

### Signatures

<b>Two-Year Institution</b>	<input type="checkbox"/> Please check here to indicate that you have read and understand the Expectations for Participating Institutional Partners (page 3-4 above).
<b>Name, Title</b>	
<b>Signature</b>	

<b>Four-Year Institution</b>	<input type="checkbox"/> Please check here to indicate that you have read and understand the Expectations for Participating Institutional Partners (page 3-4 above).
<b>Name, Title</b>	
<b>Signature</b>	



## APPENDIX

### A. Key Performance Indicators & Definitions

Key Performance Indicators		Definition
Two-Year Institution	<b>Overall Enrollment</b>	Overall enrollment (Headcount and FTES)
	<b>First-Generation Students:</b> Number and % of first-gen students served	Any student whose parents have never enrolled in post-secondary education.
	<b>High-Needs Students:</b> Number and % of high-needs students served	Any student eligible for a Pell grant program
	<b>Graduation Rate:</b> Number and % of students graduating in 4 years (earning AA or equivalent)	Any student graduating from the two-year institution earning an AA or equivalent within four year
	<b>Transfer-out Rate:</b> Number and % of students successfully transferring to a 4-year institution	Total headcount and overall rate at which a degree-seeking student transfers to a four-year institution
	<b>First-Generation Transfer-out Rate:</b> Number and % of first-gen students successful transferring	Headcount and rate at which a first-generation degree-seeking student transfers to a four-year institution
	<b>High-Needs Transfer-out Rate:</b> Number and % of high-needs students successfully transferring	Headcount and rate at which a high-needs degree-seeking student transfers to a four-year institution
	<b>Transfer-Out Rate to Partner Institution:</b> Number and % of students successfully transferring to the partner 4-Year Institution	Total headcount and overall rate at which a degree-seeking student successfully transfers to the partner four-year institution
Four-Year Institution	<b>Overall Enrollment</b>	Overall enrollment (Headcount and FTES)
	<b>First-Generation Students:</b> Number and % of first-gen students served	Any student whose parents have never enrolled in post-secondary education.
	<b>High-Needs Students:</b> Number and % of high-needs students served	Any student eligible for a Pell grant program
	<b>Graduation Rate:</b> Number and % of students graduating in 4 years (earning BA/BS or equivalent)	Any student graduating from the four-year institution earning an BA/BS or equivalent within four year
	<b>Transfer-in Bachelor's Completion Rate:</b> Number and % of transfer students successfully completing	Total number and rate at which the students who transfer to the four-year institution complete a bachelor's degree within four years of entering
	<b>First-Generation Completion Rate:</b> Number and % of first-gen transfer students completing	Headcount and rate at which a first-generation degree-seeking students complete their BA/BS or equivalent
	<b>High-Needs Completion Rate:</b> Number and % of high-needs transfer students completing	Headcount and rate at which a high-needs degree-seeking students complete their BA/BS or equivalent
	<b>Partner Transfer-in Bachelor's Completion Rate:</b> Number and % of transfer students from 2-year Partner institution completing	Headcount and rate at which students from the Partner institution transfers-in completes a bachelor's degree at the institution within four years



**B. Baseline Performance Indicator Template ([CLICK HERE](#) to download Excel template)**

*Two-Year Institution*

TERM	Overall Enrollment		First-Generation Students		High-Needs Students		Graduation Rate	Transfer-out Rate	First-Gen Transfer-out Rate	High-Needs Transfer-out Rate	Transfer-Out Rate to Partner Institution
	Head-count	FTES	Head-count	% of Total	Head-count	% of Total	%	%	%	%	%
Spring 2017*											
Fall 2016*											
Summer 2016											
Spring 2016											
Fall 2015											
Summer 2015											
Spring 2015											
Fall 2014											
Summer 2014											
Spring 2014											
Fall 2013											
Summer 2013											
Spring 2013											
Fall 2012											
Summer 2012											
Spring 2012											
Fall 2011											

**Four-Year Institution**

TERM	Overall Enrollment		First-Generation Students		High-Needs Students		Graduation Rate	Transfer-in Bachelor's Completion Rate	First Generation Completion Rate	High-Needs Completion Rate	Partner Transfer-in Bachelor's Completion Rate
	Head-count	FTES	Head-count	% of Total	Head-count	% of Total	%	%	%	%	%
Spring 2017*											
Fall 2016*											
Summer 2016											
Spring 2016											
Fall 2015											
Summer 2015											
Spring 2015											
Fall 2014											
Summer 2014											
Spring 2014											
Fall 2013											
Summer 2013											
Spring 2013											
Fall 2012											
Summer 2012											
Spring 2012											
Fall 2011											