



Call for New Funding Partners and Demonstration Sites October 1, 2006

I. Request for Proposals

Lumina Foundation for Education seeks to add additional colleges and states to the demonstration phase of Achieving the Dream: Community Colleges Count by establishing new public and private funding partnerships.

Achieving the Dream focuses on states and colleges that serve significant populations of low income students and students of color. Most of the current Achieving the Dream institutions have student enrollments that include at least 50 percent low-income students or at least 33 percent students of color.

We seek to expand Achieving the Dream in two ways:

1. To add states, and colleges within those states, that will increase the initiative's geographic reach. In these instances, interested funders are asked to underwrite:
 - a. institutional change work at a representative set of community colleges (defined as no fewer than three) in a state not currently participating in Achieving the Dream, and
 - b. public policy support work in that same state.
2. To deepen and broaden the initiative's work within some of our participating states: CT, FL, NM, NC, OH, TX, and VA. Colleges applying from these states will need a funding source to support their institutional change work. The state level policy work is already funded.

II. Initiative and Background Information

Achieving the Dream is a multiyear national initiative to help more community college students succeed. The initiative is particularly concerned about student groups that have traditionally faced the most significant barriers to success, including low-income students and students of color. Achieving the Dream emphasizes the use of data to drive change, and is especially interested in closing achievement gaps.

Co-designed by Lumina Foundation and eight national partner organizations, Achieving the Dream works on multiple fronts, including broad-based change at participating colleges; research into effective practices at community colleges; public policy at the state and national level; and outreach to communities, businesses, and the public. Improving student outcomes, particularly for students of color and low-income students, is at the core of this multilayered initiative.

In three rounds of funding, 58 institutions across nine states have joined Achieving the Dream. Following the identification of additional funding partners, a fourth (and probably final) round of colleges and states will be invited to join the demonstration phase of the initiative in July 2007. To date, Lumina Foundation has invested over \$55 million in Achieving the Dream. This includes support for the work of the eight national partner organizations that provide technical assistance to participating colleges and states, the 27 colleges and five states that began as Round One demonstration sites in 2004, and, in some cases, limited support for colleges in subsequent rounds through Memoranda of Understanding with funders. College Spark Washington, The Heinz Endowments, Houston Endowment Inc., KnowledgeWorks Foundation, and Nellie Mae Education Foundation have joined with Lumina to expand the initiative to an additional 31 institutions and four states during Rounds Two and Three.

In addition to the funders, the national partners and consultants to Achieving the Dream are: American Association for Community Colleges; Community College Leadership Program, University of Texas Austin; Community College Research Center, Teachers College Columbia University; Institute of Higher Education, University of Florida; Jobs for the Future; MDC, Inc.; MDRC; Public Agenda; JBL Associates, and KSA-Plus Communications.

III: Benefits of Participating in Achieving the Dream

A. Colleges

Colleges that participate in Achieving the Dream receive assistance in building a culture of inquiry and evidence, that is, in using data to identify problems, set priorities, and measure progress toward success. Achieving the Dream colleges make lasting changes in policies, programs, structures, and services that work in an integrated fashion to support success for all students. Additionally, Achieving the Dream institutions gain expertise in improving success among diverse student populations.

Colleges receive planning and implementation grants to help seed reforms. They have access to, training in, and use of a national database that includes student cohort data for all participating Achieving the Dream institutions. Their state policy teams work with them to share information and action strategies to influence public policy. Achieving the Dream colleges participate regularly in special institutes to work with national experts and share best practices. Perhaps most importantly, they participate in a national community of learners – like-minded leaders who are deeply committed to improving student success.

B. States

States that participate in Achieving the Dream receive technical assistance and grants to support activities resulting in policy development and reform. A lead state agency – often the state higher education governing agency – receives an annual grant for five years to cover some portion of the costs associated with research, data systems development, convening of the colleges, and other strategies leading to policy development. Technical assistance and support are provided by representatives of the national partnership.

State policy teams share information on campus issues, strategies and best practices. Issue briefs and special meetings help teams stay abreast of current policy news and ideas.

C. Funders

Funders that participate in Achieving the Dream realize significant leveraging of resources while accessing a “turn-key” comprehensive national initiative. Lumina’s investment in eight national partner organizations has created a rich infrastructure to support the efforts of colleges and states and a working alliance that has become a national voice and platform for reform. There are many different ways in which funders can add and gain value through an Achieving the Dream partnership.

Funders may tailor the college selection process and, if desired, underwrite enhancements that advance the funder’s priorities. For example, one Round Two funder supported an external evaluation of its colleges’ progress in the initiative that proved extremely valuable not only to the colleges but to the initiative as a whole. A Round Three funder is supporting training for trustees as part of its Achieving the Dream work. Funding partners also become integral to our community of learners, lending leadership and expertise by participating, if they wish, in one of four working groups that guide the continuing development of the initiative.

IV. The Design

A. Institutional Change

Each college starts by forming two or more teams to carry out the work of the initiative. A **core team** designs, oversees, and integrates the work. The core team develops and manages a process for institution-wide dialog about Achieving the Dream data findings, goals, and strategies. The team works with and through the institution councils, departments, and divisions to adopt priorities for improving student success, particularly for underserved populations.

A **data team** conducts in-depth examinations of data on student outcomes, disaggregated by race, ethnicity, gender and other characteristics to diagnose institutional strengths and weaknesses in student attainment and achievement. The data team develops simple graphic presentations to share with the core team, faculty, key academic and student support staff, administration, students, and the broader community. In addition, this team works with the core team to recommend institutional priorities for strategy development.

Achieving the Dream provides a coach – typically a recently retired community college president or other highly experienced administrator – who meets with the president and the core team quarterly. A data facilitator – typically an institutional researcher from another community college, meets quarterly with the data team to help them know what questions to ask, what data to collect, how to analyze and interpret the data, and how to present the data to decision-makers at the college. The core team participates in a national **Kickoff Institute** that grounds the team in the values, goals, and expectations of the initiative.

During the first year, the teams engage students, faculty, and the community in data analysis and conversations that lead to the development of a four-year implementation plan. The plan includes up to five priority areas for improving student success. Institutions will adapt strategies from other institutions or design new approaches to address their priority areas. They set measurable goals and integrate the Achieving the Dream plans and priorities into their strategic and annual planning, as well as budgeting and resource allocation processes.

Colleges receive **\$50,000 grants for a one-year planning** period and **\$400,000 implementation grants** that stretch over the subsequent four years. Each winter, the colleges send representatives to an annual **Strategy Institute** where national resource persons and Achieving the Dream colleges share information about problem-solving and strategies that have proven effective in increasing student success.

B. Influencing Public Policy

In each Achieving the Dream state, the initiative supports the work of a **lead organization** to promote policy innovations that help community colleges improve student success. The lead organization may be the state community college system office, the state community college association, or another group that provides leadership on community college issues. The lead organization is selected by the national Achieving the Dream partner organizations, based on the organization's interest; commitment to building a leadership team; and ability to effectively identify, develop, and execute strategic policy reform opportunities in the state.

The lead state organization receives a **\$75,000 grant**, renewable annually, which can be used to support programs, materials, and staff who will work on policy elements of the initiative, including travel and other associated expenses. Staff and other members of the state leadership team participate in semi-annual meetings of all Achieving the Dream policy teams. They share strategic and operational work plans and report on annual progress and lessons learned. They also collaborate on issues that are common across state lines, such as development of student data systems.

C. Evaluation and Assessment

Lumina Foundation is funding a comprehensive evaluation of the overall initiative, looking particularly at the experience of Round One colleges and states and the impact of the initiative on student outcomes. Several other funders are supporting formative evaluations in their states. New funders will have access to the results of these evaluations and are invited to disseminate the lessons widely and to replicate the studies in their states. One component of the ongoing evaluation includes a rigorous assessment of program strategies that the Round One colleges are implementing. Lessons from this analysis will likely help future Achieving the Dream colleges make more informed decisions about where they should invest their resources. In addition to the formal evaluation, the initiative includes a rich informal system of qualitative and quantitative evaluation and assessment through continuous feedback from coaches and data facilitators, annual report reviews, and multiple opportunities for information sharing among the colleges. These efforts support our ongoing work in policy and knowledge development.

D. Achieving the Dream in Action: Adding Value to the Field

Achieving the Dream has produced several research reports including a literature review of effective practices for increasing student success at community colleges, case studies of colleges to explore institutional characteristics and practices that affect student outcomes, and a report that documents the state of the art of institutional research at community colleges. Other studies of the institutional change process, an analysis of barriers to student achievement, and additional documentation of effective practices are underway.

Several policy briefs on topics such as placement testing for developmental education, access to community colleges by undocumented immigrants, and state data systems and privacy concerns have been widely disseminated. Policy audits in selected states in the initiative are providing baseline information on state policies that affect student access and success.

A Structural Inequity Team is working across the initiative to help colleges identify, understand, and develop meaningful action strategies to address issues of race, class, and power as they relate to student success.

Achieving the Dream is collaborating with the Ford Foundation's Bridges to Opportunity initiative and community college leaders in 11 states to build stronger state data systems that will lead to greater accountability based on student success outcomes.

A national Achieving the Dream database, which includes cohort data for all Achieving the Dream colleges and national student data, is developing into a tool for peer benchmarking and analysis of disaggregated student data. A dynamic website provides tools and information that can support institutional change and policy development.

Achieving the Dream is also developing data tools for colleges and supporting ongoing training and professional development for institutional researchers at community colleges.

Several Achieving the Dream sites have participated as pilot sites in the ongoing development of community engagement tools, including facilitator training and a workbook and video for community colleges to use in holding "community conversations."

A multi-year communications component is crafting communications materials to help colleges, state lead organizations, and national partner organizations voice consistent, compelling messages about the initiative and student success issues. The communications work includes media outreach and technical assistance and training to build colleges' capacity to communicate with a variety of audiences about their Achieving the Dream work and student success issues.

V. Expected Outcomes

Achieving the Dream expects to bring about change within institutions and in state and national policy. The initiative also seeks to increase knowledge about policies, programs, structures, and services that increase student success and to increase public support for raising postsecondary attainment levels.

At its core the initiative seeks to help more students reach their individual goals which may include obtaining a better job, earning a community college certificate or degree, or attaining a bachelor's degree. Each college participating in Achieving the Dream identifies student populations that currently experience low rates of success, develops interventions to improve student outcomes, and measures changes in student success. To gauge the effect of the initiative as a whole, all colleges document over time the percentage of low-income students and students of color who accomplish the following:

- successfully complete developmental courses and progress to credit-bearing courses;
- enroll in and successfully complete gatekeeper courses;
- complete the courses they take, with a grade of C or higher;
- reenroll from one semester to the next; and
- earn certificates and/or degrees.

After four years of implementation, we expect the demonstration colleges to show measurable improvement in success rates among the studied groups, with no reduction in enrollment for these populations.

After eight years, Achieving the Dream colleges will have achieved the long-term targets for student success set in Year One, and they will be poised to sustain or further improve success rates.

After twelve years, the initiative will influence other community colleges nationally, as evidenced by increased success rates at colleges that did not participate in Achieving the Dream.

VI. Expectations of Colleges, States, and Funders Participating in Achieving the Dream

A. Colleges

1. Achieving the Dream colleges are expected to create a **core team** that includes the president, dean of students, dean of academic affairs, institutional researcher, and at least one faculty member. The core team should expand beyond five members over time and commit to overseeing the work over the five-year period.
2. Five members of the core team, including the president, are expected to participate in a **Kickoff Institute** that will be held during the week of July 9, 2007.
3. Colleges are expected to create a **data team** that includes the institutional researcher, faculty, and other administrators. Like the core team, the data team should expand as appropriate to engage a broad cross-section of the institution and commit to working on data analysis, strategy research, and on-going evaluation of the initiative interventions.
4. A **workplan and budget** submitted after the Kickoff Institute, following approval, triggers the award of a \$50,000 investment grant that supports the first year planning work.
5. Colleges must submit **annual student cohort data** for inclusion in the national Achieving the Dream database which is used for evaluation and analysis across the initiative. These data submissions will be required through 2012.
6. All Achieving the Dream institutions participate in a mid-winter, annual **Strategy Institute** that focuses on proven strategies and programs for increasing student success.
7. Colleges are expected to **engage faculty, students, and the community** in analysis and discussion of issues affecting student success.
8. The planning year concludes with the **submission of a proposal and comprehensive workplan** for a four-year period. Colleges submit **annual progress reports** that, upon review and approval, lead to award or renewal of the four-year implementation grants.

9. Colleges are expected to share lessons and experiences with the **community of learners** from Achieving the Dream colleges, states, national partner organizations, and funders.
10. From time to time, college representatives will be asked to provide specific materials and stories about their colleges and experiences with Achieving the Dream for use in Achieving the Dream electronic and print publications. Also, members of the college community may be asked to represent the initiative at conferences or other events or in interactions with the media.

B. State Policy Teams

1. State policy teams are expected to participate in **semi-annual meetings** to share progress reports and lessons.
2. The lead organization is expected to **convene the Achieving the Dream colleges** in the state to promote sharing of lessons and problem solving.
3. The lead organization also develops strategies for **sharing best practices and lessons learned with** all community colleges in the state.
4. **State policy teams submit strategic and operational work plans, along with evidence of significant progress on policy development.** Upon review and approval, these trigger release of the annual \$75,000 policy grant.
5. From time to time, members of state policy teams may be asked to participate in conferences or other events as representatives of the initiative.

C. Funders

1. Interested funders need to commit to meeting the five-year funding requirements by December 31, 2006. Resources for the first year of the initiative must be granted to appropriate partner organizations in the Spring of 2007 (specific dates to be determined with Lumina and MDC, Inc., the managing partner for Achieving the Dream.)
2. Investment grants (planning grants) to participating colleges must be available for disbursement in August 2007.
3. Funding for subsequent years can be made available on an annual basis on a schedule to be determined and articulated in a Memorandum of Understanding with Lumina Foundation for Education.
4. Funders are invited to join with the national partner organizations and other funding partners in the oversight and guidance of the national initiative. Partner organizations and funders meet semi-annually. Four workgroups, composed of representatives from the eight national partner organizations, guide the institutional change, policy support, knowledge development, and community engagement work of the initiative. New funders are invited to participate in any of these work groups.
5. From time to time, funders are asked to review and approve various documents and other materials relevant to the initiative, and to participate in conferences and other events as representatives of the initiative.

VII. Funding Requirements

Attached worksheets provide estimates of known costs through 2012.

We recommend that prospective funders considering three colleges in one state budget \$3,000,000 over five years for the institutional change and public policy development work. This amount will cover the costs of investment (or planning) and implementation grants for each of the three colleges; coaching, data facilitation, and other technical assistance and support; and the state policy grants and technical assistance. Additional funds will be required to support evaluation, community engagement training, and other elements of the initiative in which funders may wish to have their colleges participate. These are negotiable on a case-by-case basis. We estimate that each additional college in a new state demonstration will require an additional \$730,000 depending upon the options that the funder selects. Accordingly, a five-college institutional change and state policy development demonstration will approach \$4.5 million over five years. (See Worksheet Number 1, attached.)

Colleges wishing to join from states that are currently participating in Achieving the Dream should be prepared to pay for coaching, data facilitation, and related expenses associated with participating in the initiative. We estimate that colleges will need to raise external funds and/or commit institutional funds that total \$730,000 to cover a five year commitment to Achieving the Dream. (See Worksheet Number 2, attached.)

Interested colleges, states, and funders may acquire more details about estimated costs by contacting Carol Lincoln of MDC, Inc., the managing partner for Achieving the Dream, at linc@gate.net

VIII. Round Four Application Guidelines

A. New Funders:

1. Send a Letter of Intent (LOI) by November 1, 2006. The letter must include:
 - a. Contact information (name, address, phone and e-mail address) for the individual authorized to engage in planning with Lumina and MDC, Inc., managing partner for Achieving the Dream.
 - b. The number of colleges (no fewer than three) in your state that you propose to fund for participation in Achieving the Dream and the level of funding you are prepared to commit over five years, beginning in Spring 2007.
 - c. The process by which you intend to select the participating colleges (e.g., competitive RFP) or, if you already know, the names of the colleges that you are proposing to fund and how you selected them.

2. Send your LOI by e-mail to Carol Lincoln at linc@gate.net with a copy to Kate Doom at kdoom@mdcinc.org. You will receive an acknowledgement and a request for a follow-up meeting in person or by phone to discuss your Letter of Intent and related matters in detail.
3. Upon preliminary agreement, and **on or before December 31, 2006**, you will be asked to submit a more detailed plan for meeting the funding requirements and for selecting participating colleges. While a **five-year funding commitment must be secured by December 31, 2006**, funds may be secured and allocated on an annual basis starting in Spring 2007. Final decisions for Round Four will be made on or around January 15, 2007.

B. Colleges from CT, FL, NC, NM, OH, TX, or VA:

1. Send a Letter of Intent (LOI) by November 1, 2006. The letter must include:
 - a. Contact information (name, address, phone and e-mail address) for the individual authorized to engage in planning with Lumina and MDC, Inc., managing partner for Achieving the Dream
 - b. The proposed source of funding for your institution's participation in Achieving the Dream, and the five-year level of funding committed beginning in Spring 2007.
 - c. If the funding source is not your institution, the name of the funding source, and a letter of commitment from the funding source confirming the source's intent to support your institution's participation in Achieving the Dream at the required funding level. Include the name and contact information (address, phone and e-mail address) of the individual authorized to engage in planning with Lumina and MDC, Inc.
2. Send your LOI by email to Carol Lincoln at linc@gate.net with a copy to Kate Doom at kdoom@mdcinc.org. You will receive an acknowledgement and a request for a follow-up meeting in person or by phone to discuss your Letter of Intent and related matters in detail.
3. Upon preliminary agreement, and **on or before December 31, 2006**, you will be asked to submit a more detailed plan for meeting the funding and other requirements associated with Achieving the Dream. While a **five-year funding commitment must be secured by December 31, 2006**, funds may be secured and allocated on an annual basis starting in Spring 2007. Final decisions for Round Four will be made on or around January 15, 2007.

IX. Selection Criteria for Round Four Applicants

Lumina Foundation may call upon a committee made up of representatives from the Achieving the Dream national partner organizations to advise the Foundation on which applications to accept. The committee will consider the strength of the funding commitments, the strength of the commitments by potential participating institutions (if they have been predetermined), and the strategic advantages to expanding to the proposed institutions and states. Lumina Foundation will work with prospective funders to draw up Memoranda of Understanding that document agreements between Lumina and its new funding partner(s). Applicants will be notified on or around January 15, 2007.

X. Additional information on Achieving the Dream

Visit the Achieving the Dream website: www.achievingthedream.org to find fact sheets and other materials. Questions may be addressed to Carol Lincoln at linc@gate.net

**Achieving the Dream
Worksheet Number 1
Estimate of Costs for New States to Join Round Four**

Planning Year 2007-08		3 Colleges	4 Colleges	5 Colleges
Investment Grant (per college)	\$50,000			
Technical Assistance, Services, and Related Support (per college)	80,800			
State Policy Grant	75,000			
State Policy Technical Assistance	75,000			
Subtotal	\$280,800	\$542,400	\$673,200	\$804,000
Year One Implementation 2008-09				
Investment Grant (per college)	\$100,000			
Technical Assistance, Services, and Related Support (per college)	60,900			
State Policy Grant	75,000			
State Policy Technical Assistance	75,000			
Subtotal	\$310,900	\$632,700	\$793,600	\$954,500
Year Two Implementation 2009-10				
Investment Grant (per college)	100,000			
Technical Assistance, Services, and Related Support (per college)	54,140			
State Policy Grant	75,000			
State Policy Technical Assistance	75,000			
Subtotal	\$304,140	\$612,420	\$766,560	\$920,700
Year Three Implementation 2010-11				
Investment Grant (per college)	100,000			
Technical Assistance, Services, and Related Support (per college)	46,100			
State Policy Grant	75,000			
State Policy Technical Assistance	75,000			
Subtotal	\$296,100	\$588,300	\$734,400	\$880,500
Year Four Implementation 2011-12				
Investment Grant (per college)	100,000			
Technical Assistance, Services, and Related Support (per college)	38,100			
State Policy Grant	75,000			
State Policy Technical Assistance	75,000			
Subtotal	\$288,100	\$564,300	\$702,400	\$840,500
Estimated Five-Year Direct Costs		\$2,940,120	\$3,670,160	\$4,400,200

Worksheet Number 1 Continued

Grants

- \$50,000 Investment Grants – to support planning activities during the first year
- \$400,000 Implementation Grants – to support institutional change work, strategy development and implementation, capacity building, and program evaluation
- \$75,000 State Policy Grants – to support the policy development work of the lead state organization

Technical Assistance, Services and Related Support

- **Coaching** – 12 days each year for the first two years, dropping to 9 days in the third year, 6 days in the fourth year, and 3 days in the fifth year. Includes on-site visits that provide strategic counsel to the core team in such areas as problem analysis, goal and strategy development, stakeholder engagement, and managing the politics of change; also help with team building and facilitating systematic reflection on performance.
- **Data Facilitation** – 12 days each year for the first two years, dropping to 9 days in the third year, 6 days in the fourth year, and 3 days in the fifth year. Includes on-site visits, that provide strategic counsel to help the data team develop and communicate a frank analysis of student achievement issues and patterns at the college; also help with building the capacity of the data team to engage and resolve tough issues about college performance and facilitating systematic reflection on the effect of the data team's work.
- **Cohort Data Submissions and Analysis** – colleges receive technical assistance in assembling and submitting their annual student cohort data; they also have access to web-based, password protected tools to analyze and graphically display their student data and compare their student outcome data to the data of other Achieving the Dream colleges.
- **Learning Events** – colleges receive travel allowances for five core team members to participate in a Kickoff Institute and registration waivers for four participants to participate in an annual Strategy Institute; their coaches and data facilitators also attend these events. In addition colleges may participate in optional workshops and seminars on topics such as developmental math, gatekeeper courses, learning communities and other strategies that increase student success. Over time, colleges are expected to assume an increasing share of the costs of participating in these events.
- **Tools, Information, Other Support** – colleges have access to tools for planning and faculty, student, and community engagement; communications materials; professional development opportunities; and evaluation and research reports. Newsletters, policy and strategy briefs, and peer learning networks help keep colleges informed about effective policy and practice.

State Policy Technical Assistance

- Support from national partners for cross-site learning, development of state work plans, policy research and development, dissemination of lessons across all community colleges in the state, and related activities.

Notes: These calculations assume that each coach and data facilitator will be assigned to two sites; if it is not possible to assign two or more sites per coach and data facilitator, there will be a small annual increase in coaching/data facilitation costs.

**Achieving the Dream
Worksheet Number 2
Estimate of Costs for New Colleges to Join Round Four**

Planning Year 2007-08	
Investment Grant	\$50,000
Technical Assistance, Services, and Related Support	80,800
Subtotal	\$130,800
Year One Implementation 2008-09	
Implementation Grant	\$100,000
Technical Assistance, Services, and Related Support	60,900
Subtotal	\$160,900
Year Two Implementation 2009-2010	
Implementation Grant	\$100,000
Technical Assistance, Services, and Related Support	54,140
Subtotal	\$154,140
Year Three Implementation 2010-2011	
Implementation Grant	\$100,000
Technical Assistance, Services, and Related Support	46,100
Subtotal	\$146,100
Year Four Implementation 2011-2012	
Implementation Grant	\$100,000
Technical Assistance, Services, and Related Support	38,100
Subtotal	\$138,100
Estimated Five-Year Direct Costs	\$730,040

Worksheet Number 2 Continued

Grants for Planning and Implementation

- \$50,000 Investment Grants – to support planning activities during the first year
- \$400,000 Implementation Grants – to support institutional change work, strategy development and implementation, capacity building, and program evaluation

Technical Assistance, Services and Related Support

- **Coaching** – 12 days each year for the first two years, dropping to 9 days in the third year, 6 days in the fourth year, and 3 days in the fifth year. Includes on-site visits that provide strategic counsel to the core team in such areas as problem analysis, goal and strategy development, stakeholder engagement, and managing the politics of change; also help with team building and facilitating systematic reflection on performance.
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- **Tools, Information, Other Support** – colleges have access to tools for planning and faculty, student, and community engagement; communications materials; professional development opportunities; and evaluation and research reports. Newsletters, policy and strategy briefs, and peer learning networks help keep colleges informed about effective policy and practice.

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