The James Irvine Foundation

Bridging the Gap Initiative
Call for Participation

Introduction

The James Irvine Foundation invites participation in Bridging the Gap, a new initiative supporting successful student transitions from high school to postsecondary education. This initiative is designed to help grow the scale and adoption of Linked Learning in support of our Youth program goal:

To increase the number of low-income young people who complete high school and earn a postsecondary credential by age 25.

I. Background

In 2010, The James Irvine Foundation launched the multi-year California Linked Learning District Initiative (CLLDI) as a strategy for high school transformation. Our goal was to ensure that quality Linked Learning pathways be available to the majority of young people in California so that they would graduate high school on-time, ready for college and career. As the education reform world evolved and it became clear that a postsecondary (PS) credential is essential in securing careers with family-supporting wages, the Linked Learning strategy began to evolve toward a goal of postsecondary completion. This evolution in Linked Learning provided the opportunity to reaffirm and advance the core mission of Irvine's Youth program — to increase the number of low-income young people in California who complete high school ready for college and career and earn a postsecondary credential by age 25.

As part of this evolution, over the next several years Irvine invested in broadening our reach to postsecondary. In 2012 we began the California Community College Linked Learning Initiative, which is demonstrating the potential of strong high school and community college connections. In 2014 we invested in the Linked Learning Pathways to the Baccalaureate to further strengthen connections between Linked Learning pathways, community colleges and California State Universities.

Today regions are becoming a vital locus for Linked Learning adoption and implementation. Irvine is investing in "Regional Hubs of Excellence" — places where all players, including school districts, postsecondary institutions and partners in business and community, are active and united in delivering the benefits of Linked Learning to ever-greater numbers of young people. This regional work supports efforts to extend Linked Learning principles into the college years, as postsecondary institutions commonly draw students from their surrounding communities. Further, recent state legislation — including the Linked Learning Pilot Program (AB 790) and the California Career Pathways Trust (AB 86) — supports regional approaches by encouraging or requiring regional collaboration, alignment and economies of scale.

To build on this momentum, in 2014 Irvine convened the Bridging the Gap Advisory Group — engaging a team of experts to help develop a postsecondary framework built on Linked Learning principles. Based on the group's recommendations, lessons learned from major initiatives and additional research, we determined that our best leverage would be **to help ensure students graduating from Linked Learning high school pathways enroll in and have a smooth transition into postsecondary pathways**, with a focus on those entering the Community College and/or California State University systems. Our Bridging the Gap framework emphasizes a seamless transition from high school through the early years of postsecondary, as students are more likely to earn a credential once they have completed prerequisite courses for a program of study.[1]

II. Bridging the Gap Framework

The Foundation draws upon a Loss-Momentum Framework[2] to better understand students' pathways from high school to and through college. The transition from high school to postsecondary is a significant loss point for many students. For example, students who postpone enrolling in college for a year after completing high school are 64 percent less likely to complete a bachelor's degree than those who immediately enroll after high school.[3] And, as many as one in five high school graduates who have been admitted to college never matriculate.[4]

The Bridging the Gap framework (Appendix A) identifies how K-12 and PS educational institutions can implement strategies that create, gain and maintain students' momentum toward completion by preventing them from stopping out.

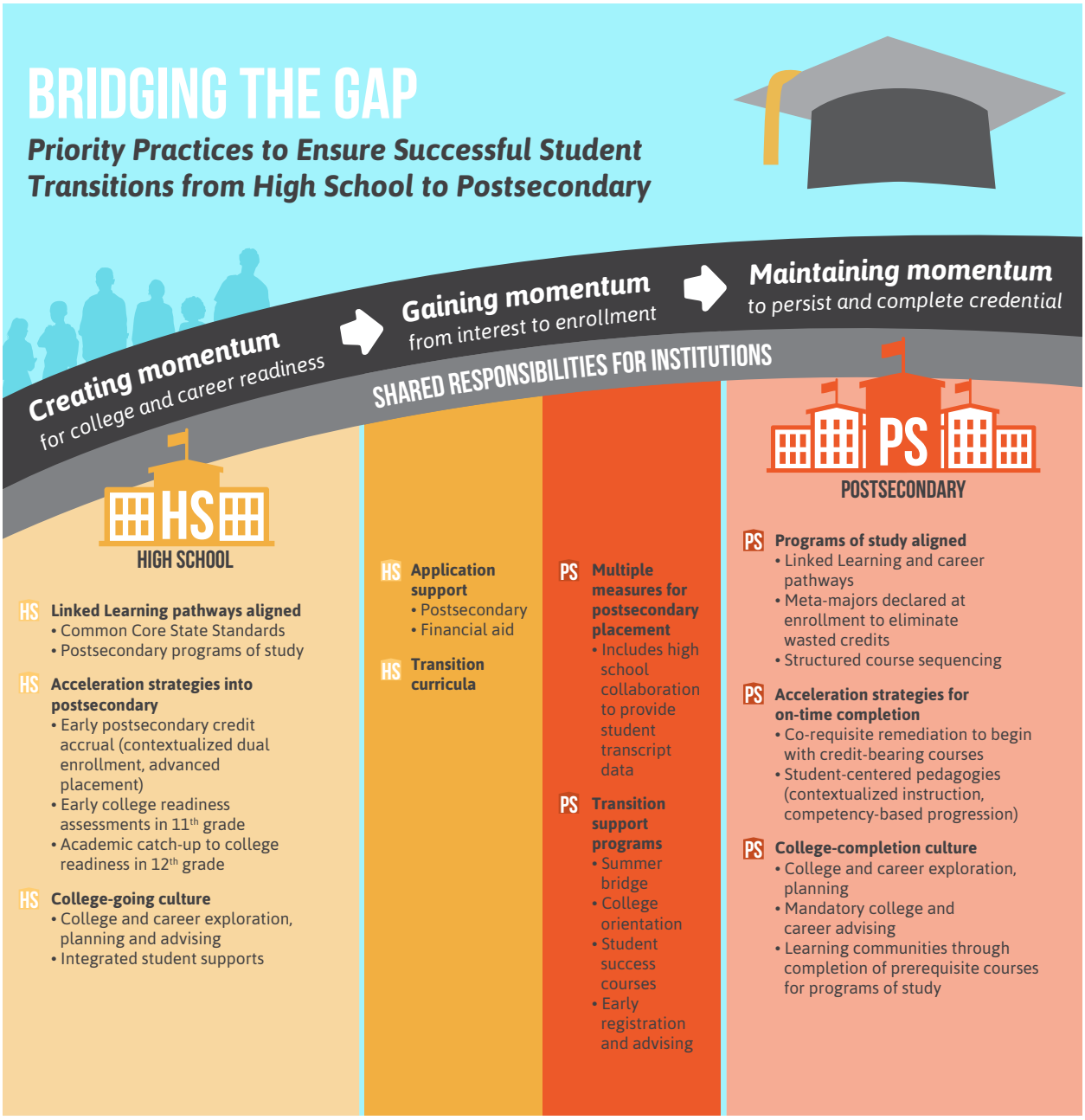
In high school, Linked Learning[5] is a model strategy for graduating college- and career-ready. The Bridging the Gap policies and practices extend this strategy to:

- Ensure a smooth transition from 11th grade through high school graduation to enrollment in PS; and,
- Create and maintain student momentum through enrollment in a program of study and timely completion of its prerequisite courses by grade 13-14.

Ensuring a direct and smooth transition requires coordination and alignment between Linked Learning high schools and PS institutions. **Regional partnerships are intended to create a space where accountability for student success is shared among stakeholders — K-12, PS, business and the community.** Furthermore, because PS institutions draw a majority of students from their local regions, regions are ideal sites to foster the collaboration and coordination necessary to accelerate student momentum from K-12 to PS.

[1] Offenstein, J., Moore, C., & Shulock, N. (2010). "Advancing by Degrees, A Framework for Increasing College Completion." IHELP and The Education Trust.
[2] Completion by Design, www.completionbydesign.org.
[3] Bozick, R. & DeLuca, S. (2005). "Better late than never? Delayed enrollment in the high school to college transition." Social Forces, 84(1), 531-554.
[4] Castleman, B.L., & Page, L.C. (2014). "Freshman Year Financial Aid Nudges: An Experiment to Increase FAFSA Renewal and College Persistence."
[5] Linked Learning is comprised of four components: rigorous academics, contextualized career-based learning, work-based learning and integrated student supports.

Expanding and prioritizing policies and practices identified in the Loss-Momentum Framework, our Bridging the Gap framework outlines an *integrated* set of high school and PS policy and practice changes to create and sustain the momentum of Linked Learning graduates to ensure they directly enroll and persist in the Community College and/or CSU Systems. **The Bridging the Gap framework elements are not "a la carte," but instead comprise a holistic theory of action that requires the collective efforts of regional partners.** In this context, Bridging the Gap elements may be developed and implemented in ways that reflect institutional and regional priorities.



III. Bridging the Gap Initiative Overview

The Bridging the Gap Initiative is based on the assumption that in order to create and sustain the necessary student momentum toward completion, systemic change across the educational pipeline will be required. At the heart of this change are cultural and structural shifts—moving *from* educational segments working in silos *to* educational partners working to build the capacity and relationships needed to attain shared responsibility and accountability for student success. This shift will require co-designing, co-delivering and co-validating strategies that provide greater structure in student experiences. Strategies may include aligned curriculum, shared readiness standards and coordinated student supports. The initiative intent is to provide a dedicated time and space to build and refine working relationships across K-12 and PS in order to advance this shift.

The initiative will support regional K-12 and PS partners as they plan for and implement integrated policies and practices within the Bridging the Gap framework. Key initiative goals are to:

- **Build regional proof points/exemplars of K-12 and PS partners working together** within a region to implement the Bridging the Gap framework to ensure a smooth transition to postsecondary for Linked Learning high school graduates (i.e., show what it looks like, how to do it and what is needed to achieve student success).
- **Build Bridging the Gap initiative pilots** at scale sufficient to test how the work can be effective at a systems level.

In order to generate and test new models of bridging the gaps within and between K-12 and PS educational segments, and allow for the appropriate time to plan and solidify relationships, the initiative has three components:

1. **Two Phases**
    - Phase 1: Nine-month Planning Grants of up to $150,000 (January – September 2016)
    - Phase 2: Two-year Implementation Grants up to $500,000 (October 2016 – September 2018)
2. **Technical Assistance/Capacity Building**
    - Phase 1: The Foundation is providing additional supports to initiative grantees to ensure that they have the data/analytical, facilitation, planning, content-related (with regard to specific reforms) and other relevant capacities necessary to plan for:
        a. Writing the Phase 2 proposals; and,
        b. Implementing the Phase 2 proposals.

        The Career Ladders Project (CLP) and the Education Insights Center (EdInsights) will collaborate to provide these supports through the Bridging the Gap Learning and Planning Institute. These parties will focus on meeting grantees "where they are," support relationship

building, and support plan development as well as implementation. We anticipate that initiative sites will need additional support around K-12 connections and capacity building during both the planning and implementation phases. CLP and EdInsights will work with sites to provide and/or secure the appropriate K-12 supports that will be useful in each regional context.

The planning activities will be informed by the need to assess structural issues and by the principles of co-design, co-delivery and co-validation. During the planning phase, staff from CLP and EdInsights will work with the sites to develop plans to support:

a. Partnership building (including opportunities for peer sharing and learning across the cohort of initiative grantees);

b. Student data collection and analysis;

c. Self-assessment; and,

d. The implementation phase.

- Phase 2: Upon completion of Phase I planning, the Bridging the Gap Learning and Planning Institute will transition to become a Bridging the Gap Learning Community, an affinity group connected to the larger Linked Learning Regional Hubs of Excellence Learning Community. Technical assistance will continue to be customized to address the learning needs identified in the Phase 1 Readiness Self-Assessments.

3. Evaluation

Selected partnerships in Phase 2 will participate in the Bridging the Gap implementation study. This study will be aligned with the Linked Learning Regional Hubs of Excellence developmental evaluation and will include the collection of a standardized data set from grantees, based on the Student Data Matrix required in Phase 1 of the Bridging the Gap initiative. The implementation study and data collection will be designed to support learning and are not for grant compliance purposes.

This Call for Participation will support Phase 1 planning activities, specifically:

- **Partnership-building.** Develop and further partnerships among key stakeholders within and across K-12 and PS and define working relationships necessary to implement the Bridging the Gap framework.
- **Student data.** Collect and analyze student momentum data (Appendix C) that will inform implementation planning and serve as a baseline for tracking student progress;
- **Self-assessment.** Conduct a readiness self-assessment (Appendix D) based on the Bridging the Gap framework's integrated policies and practices; and,
- **Implementation plan.** Create two-year plans to develop, refine and/or expand the policy and practice changes to fully implement the Bridging the Gap framework.

At completion of the planning phase, participants should have:

- A Memorandum of Understanding (MOU) outlining commitments, roles and responsibilities;
- A shared understanding of the current capacity of their partnership and what's needed to strengthen it;
- An accurate demographic and educational profile of their region's student population and that of the targeted project;
- The ability to collect and analyze student momentum data, as well as the capacity to track and analyze their partnership's progress in implementing the Bridging the Gap framework's policies and practices; and,
- A concrete project design for implementing the Bridging the Gap framework

See Appendices C and D for the Student Data Matrix and Readiness Self-Assessment, respectively, and for more detail about these planning activities.

IV. Applicant Eligibility & Commitments

Educational institutions within **existing regional Linked Learning partnerships**[6] are eligible applicants; however, only one application per regional partnership will be considered. For a regional partnership to be eligible to submit a proposal, applicants need to meet the following requirements.

- Proposed regional partnership includes at a minimum: K-12 Districts representing at least 25 percent of region's public high school population; one community college; and one CSU campus. The Linked Learning Regional Hubs of Excellence anchor organization, if applicable, may participate but cannot be the lead organization.
- Proposed project applicants have executed an Intent to Partner or draft MOU agreement.
- Proposed project applicants are willing to collect and share student data across segments.
- Proposed project applicants are committed to equitable student outcomes.

To be eligible to receive an Initiative Grant, applicants must commit to participate in:

- Additional components of the Irvine-sponsored Bridging the Gap initiative implementation study
- Bridging the Gap Learning & Planning Institute

[6] Regional Linked Learning partnerships are areas with longstanding regional efforts to expand Linked Learning, including: **Coachella Valley, East Bay, Long Beach, Los Angeles, San Bernardino, San Diego and Tulare-Kings**.

V. Eligible Uses of Funds

Grant funds maybe be used for:

- Data collection and analysis
- Planning, including activities related to readiness self-assessment
- Consultants
- Project coordination
- Release time for planning, evaluation and learning community participation
- Other direct expenses related to developing implementation plans

Grant funds may not be used to supplant existing funding.

VI. Proposal Requirements & Submission

Please provide the following information, **labeled and in the order specified** below.

A. Bridging the Gap Initiative Project Goals[7]

B. Project Overview

1. Description of the Bridging the Gap pilot project
2. Geographic area to be served by the proposed project
3. Description of the target population of the proposed project
4. Current ability to collect and share data related to target population and any obstacles to collection

C. Partnership Capacity

1. Lead organization and educational partners participating in the proposed project
2. Role of and process for selecting the lead organization
3. Each organization's experience in student success efforts within their system and across educational systems (K-12 – PS)
4. If partners are part of an ongoing student success collaborative or initiative focused on promoting Bridging the Gap framework policies and practices, indicate how long the endeavor has been in existence and its goals

[7] Goals are the intended broad, long-term impact of the project. A goal generally starts with "to" and reflects intended progress toward medium- and long-term goals (as opposed to completion of short-term objectives.) For example: to expand voter participation in California by increasing language assistance and accessibility for low-income communities.

D. Alignment and Leverage

1. Describe how the proposed project will align with and leverage existing student success initiatives in your region, e.g., Linked Learning Regional Hubs of Excellence, California Community College Linked Learning Initiative (CCCLLI), Linked Learning Pathways to the Baccalaureate (LLPB), Career Pathways Trust (CPT), Linked Learning Pilot Program (AB 790), California Acceleration Project, California College Guidance Initiative (CCGI), CORE, Multiple Measures Pilot, Achieving the Dream, Completion by Design, Pathways to Prosperity, California Leadership Alliance for Student Success (CLASS), New Math Pathways, Statway/ Quantway, etc.

2. Describe how the proposed project will align with institutional strategic plans and goals, program review processes, and system initiatives, e.g., CCC Student Success Initiative, CCC Student Equity Plans, CSU Graduation Initiative, Local Control Accountability Plan (LCAP).

E. Additional Information

1. Executed Intent to Partner or draft MOU from proposed project partners detailing roles, responsibilities and commitments, including a commitment to collect, provide and share student data.

2. List of key proposed project personnel and relevant background and qualifications and history of cultural competency of organizations participating in the proposed project.

F. Project Budget (Use budget template, Appendix B)

G. Additional Required Documents

1. A list of the applicant organization's current Board of Directors including each member's name, profession and office held on the Board, if any.

2. Total operating budget (revenues and expenses) for your organization's current fiscal year (in Word or Excel format).

3. Copies of **audited** financial statements, including notes **and management letter(s)**, for the last two fiscal year(s). If audited financial statements are not yet complete for the most recently completed fiscal year, you may submit unaudited statements for that year. For organizations with a total annual operating budget under $500,000 and without audited financial statements, in-house statements, verified and signed by an authorized representative of the organization, are acceptable.

4. Current year financial statements: (1) Statement of Financial Position or Balance Sheet; (2) Statement of Activities (this must include Budget vs. Actual); and, (3) Change in Net Assets. Unaudited statements are acceptable.

5. In the case of a *sponsored* organization, a Memorandum of Understanding from the fiscal sponsor indicating full acceptance of programmatic and fiscal responsibility for the grant. All required documents must be submitted by the sponsoring organization, which will serve as the official grantee of The James Irvine Foundation, receiving the grant award agreement and payments.

Proposals are due by 5 p.m., Friday, November 6, 2015. Proposals should be submitted electronically in PDF format to April Yee at: ayee@irvine.org.

There will be a webinar for potential participants on October 15, 2015 at 3 p.m. Please RSVP to April Yee by Monday, October 12, if you wish to participate.

Please direct all inquiries and correspondence about the initiative to:

April Yee, Program Officer
Phone: (415) 356-9938
Email: ayee@irvine.org

VII. Initiative Funding Timeline

Phase 1

Call for Participation released:	October 6, 2015
Webinar for potential participants:	October 15, 2015 @ 3-4 p.m.
Grant proposals due:	November 6, 2015, 5 p.m.
Funding decision:	November 30, 2015
Grants begin:	January 1, 2016
Site visits:	May 2016
Preliminary implementation plans due:	July 1, 2016

Phase 2

Invited proposals for implementation funding:	July 15, 2016
Webinar for potential participants:	July 22, 2016
Grant proposals due:	August 15, 2016
Grants begin:	October 2016

Appendices

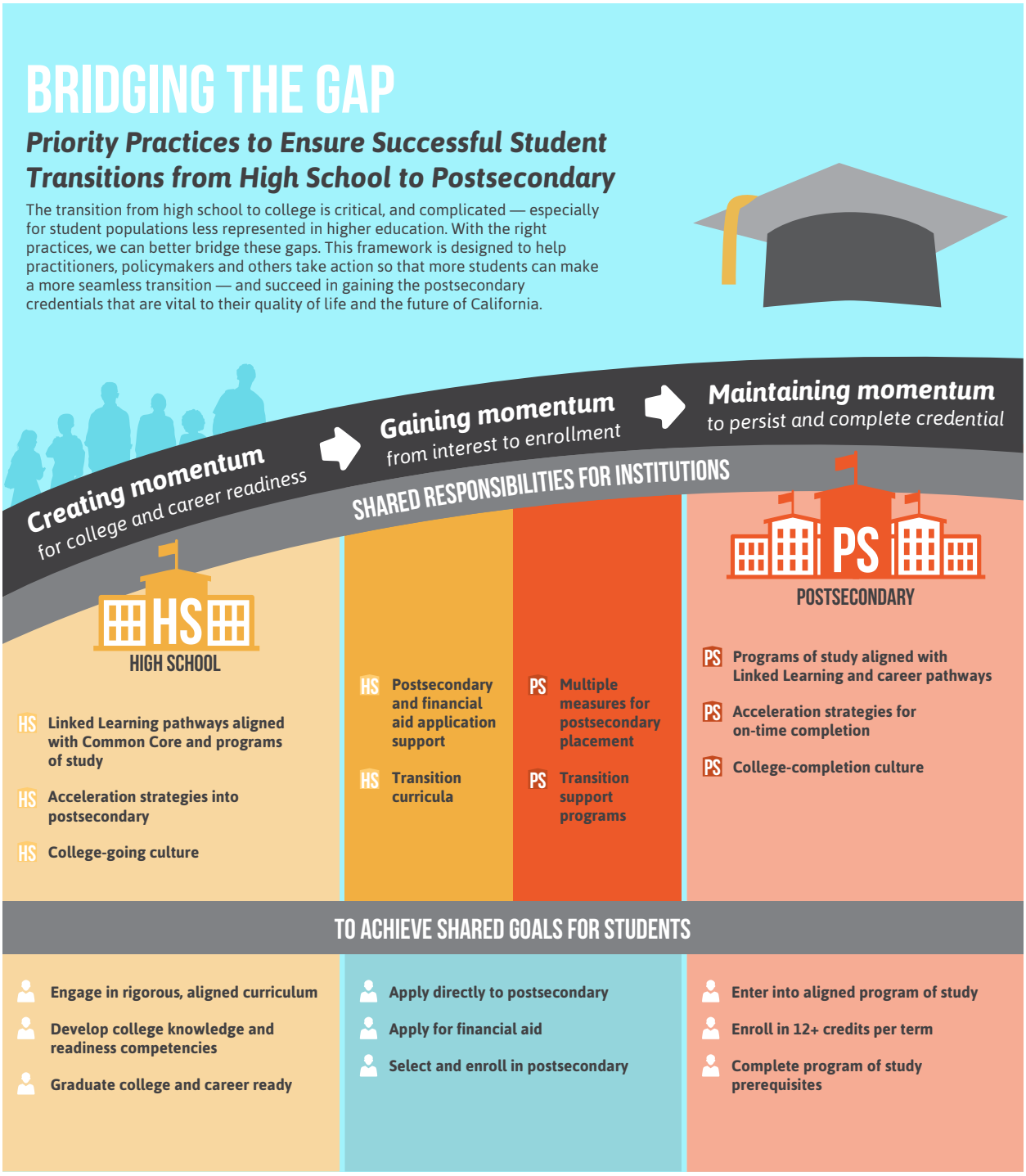
A. Bridging the Gap Framework

B. Project Budget Template

C. Student Data Matrix; **for completion during Phase 1** (Draft)

D. Readiness Self-Assessment; **for completion during Phase 1** (Draft)

Appendix A: Bridging the Gap Framework



Download the PDF.

Appendix B: Project Budget Template

Please follow the sample format below to create your proposed project budget. You may use any allowable expense category that is pertinent to your request; the categories shown below are for illustrative purposes only.

If you will be requesting indirect costs, please read The James Irvine Foundation policy on indirect costs detailed on the next page. Indirect costs must be listed in the grant budget as a line item identified as "Indirect Costs" and should be contained within the total amount requested. Indirect costs are not in addition to the grant amount under consideration.

Regional Hub of Excellence:

Amount Requested (up to $150,000):

Expense Category	Amount Requested From Irvine	Complete Project Budget
Salaries:		
Please list position and FTE		
Please list position and FTE		
Benefits		
Consultant(s)		
Please list expertise/role and hourly rate		
Please list expertise/role and hourly rate		
Facilities Cost for Project		
Meeting/Convening Expenses		
Publications		
Stipends/Release Time		
Travel/Transportation		
Add categories as needed		
Add categories as needed		
Subtotal	0	0
Indirect Costs *(show as percentage)*		
TOTAL	0	0

Access this template in an Excel file.

Indirect Cost Policy

For project support grants, Irvine offers funding for both "direct" and "indirect costs" associated with the project. For a project support grant, "direct costs" of a project are those costs directly attributable to the design, planning and implementation of a project. Direct costs generally include: salaries and benefits of project and administrative personnel who assist or manage the project; grant awards, fellowships or subcontracts; telephone, postage and printing costs; and the purchase or rent of any professional services, specific facilities, materials, equipment or other resources required to carry out the project.

Irvine believes it is also important to fund, within reason, "indirect costs" associated with the project. We define "indirect costs" as general or administrative costs that are necessary to deliver project services or activities but that may not be captured within the "direct costs" or the line-item budget of the project itself. Funding such "indirect costs" helps to ensure that Irvine contributes to the true cost incurred by the grantee in carrying out the project.

Indirect costs may include the following general and administrative costs: office supplies; bank, payroll processing or audit fees; liability insurance; rent; utilities; equipment purchase or maintenance; and salaries and benefits of executive or administrative personnel who may not be directly engaged in the project. Indirect costs must be listed in the grant budget as a line item and identified as indirect costs.

It is Irvine's policy to consider support for indirect costs in the range of 10-15 percent of the total project budget (excluding fees for subcontractors or major one-time capital expenditures, such as capital renovations or capital purchases). In rare exceptions, with the approval of the Vice President for Programs, grant budgets may include indirect costs allocations beyond 15 percent of direct costs.

Appendix C: Student Data Matrix

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MEASURES	HIGH SCHOOL		CC		CSU	
	Project	Region	Project	Region	Project	Region
STUDENT DEMOGRAPHICS						
Students by Education Segment (high school, CC, CSU)						
Household Composition						
Married couple family						
Single parent family						
Nonparental family						
Living alone						
Marital Status						
Married						
Cohabitating						
Divorced/Separated						
Single						
Has children						
Free-Reduced Lunch (K-12); Pell Eligible (PS)						
1st generation college-going						
Language Spoken at Home/English Proficiency						
English only						
Speak English less than "very well"						
Spanish						
Speak English less than "very well"						
Other Indo-European languages						
Speak English less than "very well"						
Asian and Pacific Islander languages						
Speak English less than "very well"						
Other Languages						
Speak English less than "very well"						
Ethnicity						
Hispanic or Latino						
Not Hispanic or Latino						
Ethnicity unknown						
Race						
American Indian or Alaska Native						
Asian						
Black or African American						
Latino						
Native Hawaiian or Other Pacific Islander						

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MEASURES	HIGH SCHOOL		CC		CSU	
	Project	Region	Project	Region	Project	Region
White						
Two or more races						
Race unknown						
Gender						
Female						
Male						
Age						
14-17						
18-19 - still enrolled in high school						
Under 18						
18-24						
25-39						
40 and above						
Age unknown						
Data below should be disaggregated by Student Demographic categories identified above where possible.						
LL HIGH SCHOOL - PS						
% of students in Linked Learning pathways						
# of pathways						
Pathway capacity (# of students slots available in all pathways)						
% of students on track/completing rigorous college prep curriculum (A-G courses)						
% of students enrolled in accelerated credit accrual (AP and/or dual enrollment)						
% of students who are deemed not college ready on Early Assessment Program (EAP) ELA						
% of students who are deemed not college ready on Early Assessment Program (EAP) Math						
% of students deemed not college ready on EAP participating in academic catch-up strategies						
Average high school GPA						
% of on-time high school graduates						
% of students receiving college/career advising						
Ratio of guidance counselors (doing college/career advising) to students						
% of students engaged in systematic college and career planning						
% taking the ACT or SAT						
% completing college admissions applications (by school type and average number of applications)						
% of students participating in college orientation programs in high school						
CONNECTION TO PS						
% of PS institutions (by type) providing early registration, transition support and advising (respectively)						
% of students participating in early registration and transition support						
% of student participating in summer bridge programs						
% of students participating in college orientation programs immediately before PS						

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MEASURES	HIGH SCHOOL		CC		CSU	
	Project	Region	Project	Region	Project	Region
% of students who enroll within 1 year of high school graduation						
Student enrollment by institution type and status						
Degree-seeking students - full-time						
Degree-seeking students - part-time						
% of students who complete and submit FAFSA and CAL Grants (respectively)						
% of students awarded FAFSA and CAL Grants						
Amount of total financial aid awarded (total and per students), by aid type						
ENTRY TO PS						
Institutions (by type) that provide mandatory college and career advising						
% of students participating in college and career advising						
% of first year students that participate in cohort-based student success courses/learning communities						
% of PS institutions (by type) using multiple measures for placement						
% of students placed into remedial courses (English)						
% of students placed into remedial courses (Math)						
Institutions (by type) that provide redesigned remediation strategies (e.g., supplemental instruction modularization, high intensity programs)						
% of students completing remedial coursework within one academic year						
% of students completing more than 20 credits in first academic year						
% of students with declared program of study/degree within first academic year						
Term to term persistence (community colleges)						
Year to year student persistence						
% of students who complete and submit renewal FAFSA/CAL Grant forms						
% of students awarded FAFSA and CAL Grants						
% of students working more than 20 hours a week						

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Appendix D: Readiness Self-Assessment

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SECTION I: INSTITUTIONAL INFORMATION

Element	Districts/ High Schools	Community Colleges	California State Universities
Participating Institutions *(please list)*			
Credentials Offered:			
▪ <30-credit-hour certificates	N/A		
▪ >30-credit-hour certificates			
▪ Associate Degrees			
▪ Bachelor's Degrees			
▪ Master's Degrees			
Historically Underserved Populations *(check all that apply)*			
▪ Historically black college	N/A		
▪ Hispanic-serving institution			
▪ Minority-serving institution			
▪ Tribal college			
Primary Location *(check one)*			
▪ Rural-serving			
▪ Suburban-serving			
▪ Urban-Serving			
Student Success Efforts Affiliation/Participation *(check all that apply)*			
▪ CCCLLI (CA CC LL Initiative)			
▪ LLPB (Pathways to BA)			
▪ Career Pathways Trust			
▪ AB 790 (LL Pilot Program)			
▪ CA Acceleration Project			
▪ CA (College Guidance Initiative)			
▪ CORE			
▪ Multiple Measures Pilot			
▪ Achieving the Dream			
▪ Completion by Design			
▪ Pathways to Prosperity			
▪ CLASS			
▪ New Math Pathways			
▪ Statway/Quantway			
▪ *Add as needed*			
▪ *Add as needed*			
▪ *Add as needed*			
▪ *Add as needed*			

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SECTION II: BRIDGING THE GAP STUDENT SUCCESS PRACTICES

Please assess the student success practices within your BTG Initiative partnership. If you don't know about a particular practice, place "N/A" in the "never" column.

PRACTICE	NEVER	SOME-WHAT	MOSTLY	OFTEN/ ALWAYS
LL High School (Creating Momentum)				
Pathways				
1. Aligned with Common Core State Standards (CCSS)				
2. Aligned with PS meta-majors/programs of study				
Acceleration Strategies				
3. Early PS credit accrual (contextualized dual enrollment, advanced placement)				
4. Early college readiness assessments in 11th grade				
5. Academic catch-up to college readiness in 12th grade				
College-Going Culture				
6. College/career exploration, counseling, planning and advising				
7. Integrated student supports (i.e., integrated with instruction and offered proactively as part of student experience)				

Please briefly summarize the seven "Creating Momentum" practices in your partnership's institutions, using the number designations above.

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PRACTICE	NEVER	SOME-WHAT	MOSTLY	OFTEN/ ALWAYS
Joint HS/PS Ownership for Student Connection to PS (Gaining Momentum)				
Acceleration Strategies				
1. High schools provide transition curricula (e.g., early college readiness assessments, early interventions and remediation, early college credit, college success skills)				
2. PS provide early registration, career counseling and academic advising				
3. PS uses multiple measures for PS placement/high schools collaborate to provide transcript data				
College-Going Culture:				
4. High schools provide PS/financial aid application support				
5. CC/CSU provide transition support programs (summer bridge, college orientation, student success courses)				

Please briefly summarize the five "Gaining Momentum" practices in your partnership's institutions, using the number designations above.

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PRACTICE	NEVER	SOME-WHAT	MOSTLY	OFTEN/ ALWAYS
Entry to PS (Maintaining Momentum)				
PS Meta-Majors/Programs of Study				
1. Aligned with Linked Learning and career pathways				
2. Meta-majors/programs of study declared at enrollment				
3. Structured and available course sequence (i.e., default program requirements are clearly defined and communicated, cross-functional faculty teams regularly review program and course pre-requisites)				
Acceleration Strategies				
4. Co-requisite remediation to begin with credit-bearing courses				
5. Student-centered pedagogies (e.g., contextualized instruction, competency-based progression)				
College Completion Culture				
6. Mandatory academic advising and career counseling (including financial aid re-application support) that are integrated with instruction				
7. Non-academic supports are provided				
8. Entering students participate in learning communities (or other cohort structure) through completion of prerequisite courses for meta-major/program of study				

Please briefly summarize the eight "Maintaining" practices in your partnership's institutions, using the number designations above.

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SECTION III: STUDENT SUCCESS INSTITUTIONAL POLICIES

1. **Student Success Goals.**
   a. Please list student success goals formally established for your institution. Are student success goals incorporated into the institution's strategic plan? Is there a formal statement of governing board support for a student success agenda?
   b. Is there a formal statement of governing board direction for achieving equity in student outcomes?
   c. Is there a standing item on student success and equity on agendas for the governing board and/or board student success committees?
   d. Please describe efforts to engage cross-functional and multi-disciplinary teams of faculty and staff in discussing program requirements and reviewing program level outcomes, such as students' completion of a program of study, e.g., academic affairs, student affairs, enrollment management, data, etc.

2. **Student Learning Outcomes.**
   a. Describe the extent to which your institutions have completed and regularly update definitions of student learning outcomes at the course, program and institutional levels.
   b. Briefly describe how and who uses assessments of learning outcomes.

3. **Completion and Transfer Outcomes.**
   Describe the results over the past 5-10 years of your institution's best work to improve the number and rate of students who: *(please complete a. or b. as applicable)*
   a. High Schools: graduate on-time with A-G requirements
   b. PS: complete a certificate with labor market value, attain an associate's degree, transfer to a BA-conferring institution, attain a BA.

4. **Labor Market Alignment**
   Please describe how and to what extent your partnership's institutions systematically use current labor market data/information to:
   a. Align curriculum with labor market needs,
   b. Conduct career counseling and academic planning with students,
   c. Assess employment/earnings outcomes for students after graduating
   d. Inform career counseling as part of the college intake process.

5. **Promoting Equity**
   Describe your partnership's institutions most successful work to improve equity in outcomes for students of color and students from low-income backgrounds

6. **Policy Changes**
   a. Describe key policy changes at the institutional levels within your partnership that have been critically important to the institution's student success work. If possible, provide data illustrating the impact of the policy (i.e., how many students were affected, in what way, and with what results).
   b. Describe key structural barriers that impede progress on student success, e.g., impaction. If possible, please indicate what policies (state and institutional) contribute, and what, if anything, is being done to address them.

7. **Reallocation of Resources**
   Describe examples of significant reallocation of institutional resources (i.e., operating dollars, capital dollars, personnel, time) to support student success efforts within your partnership's institutions.

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SECTION IV: DATA COLLECTION AND USE

1. Please describe the following about the partnership's institutions data collection and use:
   a. Do the institutions have clearly defined metrics for monitoring student progress and success? If so, please list the five most important metrics collected.
   b. Do the institutions regularly report on these metrics? Briefly describe how and by whom the data are used.
   c. Do your partnership's institutions routinely disaggregate and report data on student progress and completion by selected student characteristics?
      - ❑ No
      - ❑ Yes

      If yes, check all routinely disaggregated variables that apply
      - ❑ Race/Ethnicity
      - ❑ Gender
      - ❑ Income
      - ❑ Enrollment Status (FT/PT)
      - ❑ First time in college

      Please describe how and by whom the data are used.

2. Do your institutions routinely engage in longitudinal tracking of entering student cohorts?
   - ❑ No
   - ❑ Yes

   If yes, briefly describe how and by whom the data are used.

3. Describe the institutional research capacity within the partnership's institutions and the IT capacity to support data use in planning, decision-making and monitoring student progress.

4. Do your institutions conduct student engagement data collection (e.g., CCSSE/SENSE student engagement surveys)? If so, please describe how and by whom the survey results are used.

5. Please describe the two best examples of your partnership's institutions use of data to explore and address a key student success issue. Indicate what issue was being explored, what the data showed, and what was done differently after reflecting on the data.

SECTION V: INTER-SEGMENTAL DATA SHARING & USE

1. Please describe any data-sharing agreements between the K-12, CC and CSU systems that are established and sustained (student-level data as well as aggregated).

2. Are the data regularly analyzed collaboratively across educational segments? Are the data reviewed and presented to the highest-level leadership at both the high school and PS system-level at once a year?

3. Are the equity/achievement gap data collaboratively analyzed across educational segments? Is there a commitment to analyze and review equity/achievement gap data across educational segments and make meaningful organizational decisions to address the gaps?

4. Based on baseline data reviews, have K-12, PS and community leadership agreed upon measurable objectives to improve student access and success?

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SECTION VI: SYSTEMIC BARRIERS

Please describe the key systemic and/or cross-system barriers or disincentives to implementing the BTG Framework policies and practices.

SECTION VII: TA NEEDS

Please describe your partnership's learning and technical assistance needs. Please be as specific as possible so that the BTG Learning Community and individualized coaching/assistance can be customized to your needs.

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