CONCEPT NOTE STRUCTURE

1. Executive Summary of Concept (1 page)
2. Description of Organization and Experience Relevant to this Project (1 page)
3. Project Approach (3 pages)
   a. Timelines and Scheduling

   How will you monitor data delivery schedules and related milestones? How will you ensure intermediaries adhere to these schedules in a smooth, integrated way?

   b. Engagement Model

   How would you organize the chain of communication among the intermediaries, the foundation, and the evaluation partners?

   c. Appraisal Model

   How will you keep the foundation and the evaluation partners informed of the progress and challenges of data collection? How will you determine whether the intermediaries feel satisfied with the service they are receiving? How will you identify areas of improvement for yourself?

   d. Data Delivery

   What is involved in the data transfer process and timeline for transferring data? What format do you anticipate sending data to the foundation and the evaluators? How does your solution leverage interoperability standards?

   e. Documentation

   How will you ensure that tools, trainings, etc. are shareable and broadly applicable to future intermediaries?

4. Technical Assistance Approach (3 pages)
   a. Methodology

   How will you determine intermediary data capacity? How will you monitor burden on intermediaries, schools, and districts?

   b. Timeline

   How much time will you need to assess capacity with respect to people, systems, and process? Will work be evenly distributed throughout the year or do you anticipate heavier burden at different times?

   c. Student Data Experience

   What experience do you have working with student data and working with different student information systems?
d. **Data Capability Gap Analysis**

What experience do you have in addressing gaps in data capacity by providing technical assistance?

e. **Student Privacy**

Given that it is the intermediaries' role to deidentify student data, how will you ensure that data being sent to you by intermediaries protect student privacy and do not disclose any Personally Identifiable Information? Have you created any documentation regarding K-12 data sharing best practices or worked with data privacy agreements, such as with K-12 and postsecondary schools? What steps will you take to ensure data security?

f. **Data Quality**

How will you validate the quality of the data received from intermediaries?

g. **Tool Building**

Please provide a relevant example of a tool and resource you have created. What was the problem these tools were trying to solve, who was the audience, in what format was the tool, what evidence do you have that the tool was useful or successful?

5. **Diversity and Equity (1/2 page)**

The Bill & Melinda Gates Foundation is committed to advancing diversity, equity, and inclusion in our organization and with our partners. The foundation particularly encourages minority- or women- led organizations to respond.

How is your organization working both internally and externally to advance diversity, equity, and inclusion? Please describe in a brief statement. This could include:

- information on the work that you have done for Black, Latino, and low-income students;
- spending history with diverse suppliers during past project management projects; and/or
- make-up of your full-time staff, by gender and by race/ethnicity and make-up of the board of your organization, by gender and by race/ethnicity.

6. **Open Source Software/Interoperability Standards (1/2 page)**

We are also committed to information sharing, transparency, and developing products for greater public benefit. We prefer organizations who have knowledge of open-source software and can prioritize their use over proprietary software, such as using free and open-source software for data wrangling or interoperability standards such as Ed-Fi and IMS Global. How would you intend to use open-source software and/or interoperability standards in the proposed work?

7. **Cost Structure (1/2 page)**

How much do you anticipate this work will cost across time? Are there any contingencies that will impact the cost?