



**SCHOLARMATCH, INC.
REQUEST FOR PROPOSAL**

**Program Evaluation Consultant
for College Persistence Program**

**Date Issued:
February 6, 2024**

**Deadline:
March 15, 2024**

OVERVIEW

ScholarMatch’s mission is to support first-generation college students from low-income backgrounds to earn a bachelor’s degree within five years. We provide virtual individualized advising, targeted financial support, and career mentoring all the way to graduation. Since 2010, ScholarMatch has been dedicated to supporting first-generation college students from low-income backgrounds as they apply to and persist through college. Our students’ median family income is \$40,000, with 95% of our students coming from BIPOC (Black, Indigenous, and People of Color) communities, and 92% being the first in their family to attend college. The majority of our students join us from the San Francisco Bay Area. We also serve student cohorts in Los Angeles and nationwide, through scholarship and advising partnerships. Our work is relationship-based, equity-minded, and student-centered.

With this RFP, ScholarMatch solicits proposals from program design and evaluation consultants who have specialized experience in college persistence programs to perform the professional services outlined in the Scope of Work (outlined below). Following the evaluation of responses to this RFP, ScholarMatch may select one or more consultant agencies to provide its desired services. Consultants that are familiar with the California higher education landscape are preferred.

In issuing this RFP, ScholarMatch makes no commitment to establish a work contract with any consultant(s) responding to this RFP, either within the dates specified in the RFP or at any other date(s). ScholarMatch will not reimburse consultants for any expenses or pay for any implied services associated with responses to this RFP – consultants electing to respond to this RFP must do so entirely at their own expense. ScholarMatch agrees to maintain all consultant proposal materials as private and confidential and not display or disseminate them to any individuals other than those evaluating their contents for purposes of this RFP. All proposals and collateral materials submitted in response to this RFP become the property of ScholarMatch and will not be returned to consultants.

RFP TIMELINE

February 6, 2024	Formal Release of the RFP
March 1, 2024	Questions due in writing by 5:00 p.m. PST to rfp@scholarmatch.org
March 15, 2024	Proposals due by 5:00 p.m. PST to rfp@scholarmatch.org
April 15, 2024	ScholarMatch invites selected candidates for interviews
May 15, 2024	Notification of decision
July 1, 2024	Desired start date for consultant

ScholarMatch reserves the right to adjust any of these dates as necessary to meet its needs. In the event that any of the dates are adjusted, ScholarMatch will send information about the date changes to all consultants to whom this RFP was originally distributed as well as any other consultants that have made their interests known to ScholarMatch.

SCOPE OF WORK

The professional services we seek include, but are not limited, to the design and evaluation of a scalable college persistence program model that will support first-generation college students with college persistence and completion.

ScholarMatch's college persistence program, called the Scholars Program (SP), currently provides scholars with targeted financial support up to \$5,000 annually plus an assigned staff college advisor for 1:1 holistic support. In June 2025, we will launch a collaborative advising program to test a new model of providing scalable persistence support. The new program model will include staff-led small group advising and peer-led support. Scholars will also have access to basic needs grants to support their participation in the program.

Throughout the partnership, the expectations are that the consultant will participate in video meetings and provide project management updates on a monthly basis or agreed upon timeframe, as well as respond to all email communications within 48 hours.

During the planning phase of this new program (January 2025 - May 2025), the goal is to build on previous program pilots to design a new program to launch in June 2025 with up to 200 high school seniors. Specific elements of this planning phase include:

- Revise and update literature review of scalable virtual college persistence programs and provide recommendations for program implementation.
- Work with the team and other key stakeholders to develop a detailed program evaluation work plan.
- Identify or develop specific evaluation questions and associated metrics related to college persistence, academic performance, sense of belonging, etc.
- Develop strategies for baseline data collection that can be managed by ScholarMatch's data team.
- Support collection of qualitative and quantitative data.
- Develop plan for data synthesis to be managed by ScholarMatch's data team and train data team on implementation.

The anticipated budget for this scope of work is up to \$80,000.

In addition, we seek optional support with ongoing data collection and reporting with the project through May 2027.

- In collaboration with ScholarMatch's data team, produce clear and accessible reports on qualitative and quantitative findings to be shared with grant funders and other key stakeholders.
- Please provide a separate hourly quote for ongoing support.

Time Period	Anticipated Activities
July - September 2024	<ul style="list-style-type: none"> -Orientation meeting(s) with project team -Review of existing literature and data previously collected -Update literature review
September - December 2024	<ul style="list-style-type: none"> -Creation and presentation of program design and evaluation plan
January - May 2025	<ul style="list-style-type: none"> -Development and implementation of baseline evaluation measures and reporting -Training for data team on data analysis and reporting

PROPOSAL REQUIREMENTS

All proposals to have: 1.0- or 1.25-inch left and right margins, 1-inch top and bottom margins, 12- or 14-point typeface using only Arial fonts, and consecutive numbering of ALL pages, with the exception of attachments. Please note that electronic proposals must be submitted in a “**write-protected**” format, such as a pdf or Word file that is locked against modification with a password. Proposals are expected to be responsive to all the questions and considerations raised throughout the RFP. An agency’s failure to provide sufficient information on, or conformity with, any item within this RFP may be sufficient cause for ScholarMatch to reject any further consideration of that agency’s proposal.

Proposal must include the following:

- Name and full contact information of a single individual for the purpose of communications related to receiving and evaluating your agency’s response to this RFP.
- Agency description, including:
 - A brief history of the program research and design consultant’s organization
 - Current agency descriptive information
 - Full disclosure of agency ownership details
 - A list of the program research and design consultant’s five largest (by work volume) current clients
 - Names, addresses, telephone numbers, and email addresses of at least one former and four current clients who may be contacted for references
 - Names of ALL other current or recent clients engaged in programs similar to those of ScholarMatch

ScholarMatch

- The specific individual(s) who will act in the capacity of Account Executive, lead and support staff for the ScholarMatch contract. For the involved individual(s), the proposal must include:
 - A detailed biography or resume
 - A job description for the individual(s) in relation to this contract
 - An organizational chart showing the person's role
 - Estimated percent of each individual's time that will be dedicated to this project
- Complete explanation of the policies, processes, tools, resources, procedures, schedules, reports, etc. that will be used to deliver the desired goods and services.
- Explanation of the comprehensive process for proposing and controlling changes to the proposed work processes, products and service requirements, and their associated time and budget constraints.
- Explanation of the management processes your agency regularly uses to ensure that the products and services you provide are timely, correct, consistent, complete, and high in quality. Please explain any policies you have related to warranties of your work, and how those policies are implemented and enforced. Explain the avenues of recourse ScholarMatch will have in the event that it is not satisfied with the products and services rendered as a result of this contract.
- Pricing
 - The proposed pricing of products and services offered by the program research and design consultant agency must reveal and encompass all anticipated expenses.
- Samples of previous work
 - As an attachment to the proposal, please submit one or two case-history examples of materials and services prepared for current or recent clients, similar in nature to what you are proposing for ScholarMatch.
 - If possible, please prepare or modify these attachments to protect their confidentiality and hide the identity of your client(s). These materials will be kept confidential and will not be returned.
- Your proposal must affirm ALL the following statements. In doing so, please provide any required information. You must explicitly reveal and explain any exceptions to or deviations from these statements.
 - Your agency is properly registered and/or bonded in all states required in order to provide your services and/or sell your products.
 - Neither your agency, or its officers, directors or owners, nor any current client of your agency has any state, federal, internal revenue, postal, or federal trade commission criminal enforcement actions pending against it, nor have any of these organizations or individuals had such an action pending or current in the past 36 months to the best of the knowledge of any officer, director or owner of your agency.
 - Your agency or your principals and owners have the following affiliates which are partially or wholly owned by your agency or your principals and owners or with which your agency deals, other than completely "at arms length." (List_____).

ScholarMatch

- Of the preceding list of affiliates the following are proposed as subcontractors under your agency's proposal to ScholarMatch (List_____).
- Before entering into any contract with ScholarMatch, your agency understand that it will be required to agree not to enter into any agreements or understandings of any type or description with any current consultants or subcontractors to ScholarMatch which would provide commissions, finders fees, discounts, or any form of compensation or benefit to your agency or to any third party (including officers, directors or staff of ScholarMatch) other than directly to ScholarMatch except as specifically approved in writing by ScholarMatch.
- Your agency has all of the required commercial general liability insurances including professional liability, workers' compensation and personal injury and advertising injury (provide current certificate if awarded contract).
- Signature
 - Your proposal must be signed by an owner, principal, officer of the corporation, or another person who is legally authorized to enter into agreements on behalf of your agency.

SUBMISSION INSTRUCTIONS

Please email write-protected electronic proposals to rfp@scholarmatch.org
by March 15, 2024 at 5:00 p.m. (Pacific Time).

INQUIRIES

All suggestions and inquiries pertaining to this RFP should be addressed to:

Ms. Devon Moore
Senior Director of Programs and Compliance
Email Address: rfp@scholarmatch.org

Suggestions and questions about the RFP may be sent via post or email to ScholarMatch until March 1, 2024. After that date, no further comments or inquiries will be accepted. Answers to all questions will be distributed to all consultants as quickly as possible. ScholarMatch reserves the right to modify the RFP based on these comments and questions, as well as its own predilections, up until March 8, 2024. All final RFP modifications will then be distributed to all consultants.