



Marion County K-12 Public Schools Initiative

2024 REQUEST FOR PROPOSALS

Lilly Endowment is pleased to announce the Marion County K-12 Public Schools Initiative. The aim of this initiative is to help public schools initiate, enhance or expand compelling programs and projects that show promise to improve their students' academic achievement and prospects for post-secondary success.

The Endowment has allocated up to \$450 million for this multi-year initiative. Eligible public school districts and public, nonprofit charter schools may request funding through a three-phase process.

Phase 1 Planning Grants: Eligible applicants are each invited to request a planning grant of up to \$50,000 to be used for a one-year period. These grants may be used to prepare proposals for grants under Phases 2 and 3 of the initiative through planning efforts including, among other activities, research regarding promising practices, visits to other schools or districts, consultation with experts, and/or facilitated meetings or focus groups to help address the aim of the initiative. **Planning grant requests are due by 12 p.m. (ET) on Friday, September 13, 2024.** As currently scheduled, notification and payment of grant awards will be made in October 2024.

Phase 2 Implementation Grants: Eligible applicants are invited to submit a proposal requesting a grant to initiate, enhance or expand compelling programs or projects designed to help improve the academic achievement or the prospects for post-secondary success of their students. Implementation grant amounts will be calculated based upon an amount of \$500 per student, using the applicant's K-12 student enrollment during the 2023-24 school year. **Implementation grant proposals must be submitted on or before 12 p.m. (ET) on Friday, February 14, 2025.**

Phase 3 Competitive Grants: The Endowment has allocated up to \$375 million for Phase 3, which comprises a two-stage competitive process. In the first stage, applicants may submit a concept paper requesting competitive grants based upon K-12 student enrollment during the 2023-24 school year (see page 11 for details) for programs or projects that are likely to have significant impact on students' academic achievement or their prospects for post-secondary success. **Concept papers must be submitted on or before 12 p.m. (ET) on Monday, April 7, 2025.** Those applicants submitting the most compelling and promising ideas may, at the Endowment's sole discretion, be invited to participate in the second stage and submit a full proposal for a Phase 3 competitive grant later in 2025.

Background

The Endowment believes that K-12 education plays an essential role in a child's learning and development and life trajectory. Accordingly, the Endowment has over the years supported K-12 education in multiple ways, including through grants to K-12 schools and education-focused nonprofit organizations, higher

education institutions for educator preparation programs, directly to educators and to the Indiana Department of Education. In keeping with the interests of the Endowment's founders, much of this support has been focused on schools in Indiana, and especially in Indianapolis.

K-12 schools and the experiences they provide typically comprise a majority of the formal learning persons receive in their lifetimes and help establish a foundation for lifelong learning. Schools primarily direct their efforts toward the advancement of the academic success of their students, including the preparation of their students for post-secondary education, careers and life success. To achieve these objectives, schools attend to varied and complex factors, such as recruiting and developing educators, adopting suitable curricular materials, providing well-equipped spaces for learning, addressing the socio-emotional development of students and differentiating instructional approaches to meet diverse learning needs. Schools also provide opportunities for students to explore non-academic interests and build life skills through engaging co-curricular and extracurricular activities and often work in collaboration with others to address non-academic needs of students. If left unmet, these non-academic needs, such as safe and secure housing, adequate and healthy food, and appropriate mental and physical healthcare, can significantly hinder educational progress.

Despite the best efforts of countless talented educators, too many students in Marion County K-12 schools are not achieving adequate educational success. Obstacles to improving strong academic achievement and post-secondary success are especially persistent for some students from populations that have historically faced or may currently be facing societal, economic or other challenges to academic achievement. Among others, this may include, students of color, students living in low-income households, students learning English as a new language, students from families who have recently immigrated, students with special needs, students facing mental or physical health challenges, students placed in foster care and students experiencing homelessness.

Through this initiative, the Endowment aims to help Marion County schools initiate, enhance or expand compelling programs or projects that show promise to improve their students' academic achievement or their prospects for post-secondary success.

Initiative Eligibility

Eligible applicants for the Endowment's Marion County K-12 Public Schools initiative include public school districts, nonprofit charter schools and charter school networks with schools physically located in Marion County. Eligible charter schools must be described in Internal Revenue Code (Code) section 501(c)(3) and Code section 509(a)(1) (which incorporates Code sections 170(b)(1)(A)(i)-(vi)), 509(a)(2), or (509)(a)(3) (Type I or Type II). Schools that are affiliated together for governance and operating purposes, such as school districts and charter school networks, will be viewed as single applicants and should provide a single application for each phase of the initiative. Innovation Network Schools are eligible to apply independently only if those schools hold a current charter and meet the aforementioned Code requirements. Innovation Network Schools that do not hold a current charter but are members of a school district's Local Education Agency may not apply separately and should instead be considered within the district's applications.

Although the Endowment often supports K-12 education efforts across the state of Indiana, this initiative is focused only on schools physically located in Marion County. State-run and virtual schools are not eligible for this initiative.

Applicants that have questions regarding their eligibility for this initiative are encouraged to reach out to Endowment staff by sending an email to K12initiatives@lei.org.

Initiative Priorities

Academic achievement and post-secondary success are influenced by the presence or absence of many factors, both in and outside of the classroom and school. Accordingly, eligible applicants interested in pursuing funding through this initiative may propose programs or projects that address the aim of the initiative through one or more of the following **three priorities**:

- 1. Improving academic achievement:** Applicants may seek funding to implement programs or projects that aim to directly increase K-12 academic achievement of students attending their schools. Academic achievement may be measured in broad and varied ways, including through performance (proficiency or growth) on various assessments, grade-level promotion rates, graduation rates, course-completion and on-track rates, among others. Programs or projects may be designed to improve upon classroom learning experiences or supplement learning that takes place in the classroom.
- 2. Improving post-secondary success:** Applicants may seek to implement programs or projects that show promise to equip graduates for future success in post-secondary education or careers. Such programs or projects may, among other things, help students develop the knowledge, skills and mindsets important for post-secondary success, including among other strategies, by providing experiences that enable students to examine how their interests and strengths align with various post-secondary endeavors they may choose to pursue.
- 3. Addressing challenges and opportunities that can affect academic achievement or post-secondary success:** Applicants may seek to implement programs or projects to help students overcome non-academic challenges or provide students with opportunities that can, based upon convincing research and other evidence, improve students' academic achievement or prospects for post-secondary success. Challenges may be defined broadly and include factors such as food insecurity, unstable family housing, physical or mental health challenges or chronic absenteeism, among others. Challenges may also include school-based factors such as an inadequate supply of teachers in a school or limited access to new technology. Opportunities that can affect academic achievement or post-secondary success may include, among others, various co-curricular or extracurricular activities such as student councils and clubs, performing arts, work-based learning experiences, and community service. At their discretion, applicants may seek to collaborate with other organizations to address challenges and opportunities that can affect academic achievement or the prospects for postsecondary success.

Required Proposal Elements

In addition to addressing one or more of the three priorities, proposals and concept papers must include the following elements:

- A description of the extent to which programs or projects will support the success of populations of students that, as mentioned previously, have historically faced and may be currently facing societal, economic or other challenges to academic achievement (see page 2).
- An explanation of how the proposed programs or projects are based on convincing research or other evidence indicating that they show promise to improve academic achievement or the prospects for post-secondary success for students.
- Data-driven analyses of the challenges faced by students and use of relevant data and information to establish expected outcomes and guide proposed programs and projects.
- A description of promising collaborations with other organizations that share an interest or have demonstrated expertise in addressing challenges and opportunities faced by students, if applicable to the proposed programs or projects.
- Articulation of the extent to which proposed programs or projects are informed by and aligned with priorities and requirements of the Indiana State Board of Education, Indiana Department of Education (IDOE), Indiana Commission for Higher Education and other relevant authorities.
- A commitment to strong and sustained oversight of proposed programs or projects by the applicant's most senior organizational leaders.
- A plan to sustain programs and projects that the applicant expects to continue beyond the grant period.

Use of Funds

Given the intentionally broad aim of this initiative, the many and varying needs of students in Marion County, and the diverse and distinctive missions of eligible schools, the Endowment expects applicants will present a wide array of programs and projects in their proposals and concept papers. If awarded, grant funds from this initiative may be used for a variety of expenses required to conduct the proposed programs or projects, including but not limited to salary and benefits for key personnel, consultants, technology software or equipment, curriculum or supplies, furniture, professional development, travel, facility construction or renovation, events and meetings, and program evaluation.

Grants awarded through this initiative may not be used for student tuition scholarships of any kind or to provide, for student recruitment purposes, any incentives to prospective students or their families. Additionally, grant funds may not be used to fund endowments or rainy-day funds.

To illustrate the breadth of possible approaches applicants may propose, the Endowment has prepared the Programs and Projects Examples document, which accompanies the RFP, that provides examples of programs and projects that could be viewed as effectively addressing the aim of the initiative and one or more of its priorities, if well developed and supported by convincing research or other evidence.

Phase 1 Planning Grants

The planning phase of the initiative (Phase 1) is intended to help applicants 1) envision and develop plans that align with the initiative's aim by addressing one or more of the priorities (listed on page 3 of this RFP), 2) prepare a proposal for an implementation grant under Phase 2 of the initiative, and 3) if desired, prepare a concept paper for the competitive phase (Phase 3) of the initiative.

All eligible applicants are invited to request a planning grant of up to \$50,000. Funds from these planning grants may be used for a period of up to one year at the discretion of the applicant to cover a variety of planning expenses, such as research regarding promising practices, consultants, staff time, data analysis, conferences and seminars, travel to gather information and ideas, and preparation of Phase 2 and Phase 3 grant proposals.

Phase 1 Guidelines

Letter of Request: To request planning funds, applicants are invited to submit a letter of no more than two pages. The letter should be signed by the applicant's board chair and most senior organizational leader (e.g., superintendent of a district, principal of an independent charter school, etc.). In this letter, the applicant should:

- Briefly describe the applicant's most pressing challenges and/or most promising opportunities related to the initiative's aim and priorities.
- Briefly describe what activities the applicant might undertake using planning funds to prioritize or deepen its understanding of these challenges and opportunities and develop strategies to address them.
- Indicate the amount requested for planning funds (not to exceed \$50,000). *Although a detailed budget is not required in requesting a planning grant, after the planning phase each applicant will be required to submit a report describing how planning grant funds were used according to the provisions of the grant agreement.*

In addition to the Letter of Request, planning grant applicants must submit the following documents, which may be found within the Application Packet and online in the Resources section of the [initiative's webpage](#).

Applicant Information Form: Complete the provided form, including signatures of the applicant's board chair and most senior organizational leader.

Exempt Status and Charity/Foundation Status Information Form: Complete the provided form.

A Copy of the Applicant's IRS Exempt Status Determination Letter: Some applicants, such as a public school district that operates as a governmental unit, may qualify as public charities described in Code section 501(c)(3) and Code section 509(a)(1), (2) or (3) without obtaining an IRS determination letter; if such a letter is required, however, it should be included. A Sample IRS Exempt Status Determination Letter may be found in the Application Packet on page 19.

Phase 1 Submission Instructions

The planning grant Letter of Request and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative's webpage](#) **on or before 12 p.m. (ET) on Friday, September 13, 2024**. See page 15 for the Grants Submission Checklists and Deadlines.

The Endowment expects that notification and payment of planning grants will be made in October 2024.

Continue to page 7 for Phase 2 information.

Phase 2 Implementation Grants

In Phase 2 of the initiative, the Endowment will make funding available to eligible public school districts, charter schools or charter school networks that submit high-quality proposals to initiate, enhance or expand compelling programs or projects that show promise to improve academic achievement or the prospects for post-secondary success for their students. The Endowment will make implementation grants that fund up to 80 percent of expenses associated with proposed projects or programs. Implementation grants may be used for a period of up to five years.

Each eligible applicant may apply for an implementation grant of up to \$500 multiplied by the number of K-12 students enrolled at the applicant's school(s) on the Fall 2023 count day (Monday, October 2, 2023), as submitted to IDOE for its average daily membership (ADM) count and shared publicly on the [IDOE Data Center & Reports website](#). An applicant that enrolled fewer than 400 K-12 students in 2023-24 is eligible to apply for an implementation grant of up to \$200,000. For example:

- A school district that enrolled a total of 13,520 students in grades K-12 on October 2, 2023, may request an implementation grant of up to \$6,760,000 ($\$500 \times 13,520$ students).
- A network of five charter schools that enrolled a total of 890 students in grades K-12 on October 2, 2023, may request an implementation grant of up to \$445,000 ($\500×890 students).
- An individual charter school that enrolled 345 students in grades K-12 on October 2, 2023, may request an implementation grant of up to \$200,000.

Although the Phase 2 implementation grants will not be awarded on a competitive basis, the Endowment will only approve proposals that describe well-developed strategies to initiate, enhance or expand compelling programs or projects that address the aim of the initiative and one or more of the initiative's priorities and, based upon convincing research or evidence, show promise to improve to a meaningful extent academic achievement or the prospects for post-secondary success for the applicant's students. **The Endowment will not approve Phase 2 implementation grants in amounts that exceed 80 percent of expenses associated with proposed programs or projects.**

Phase 2 Guidelines

An implementation grant proposal should be organized as follows and include the elements listed below. Documents referenced may be found within this Application Packet or online in the Resources section of the [initiative's webpage](#).

Applicant Information Form: An applicant must resubmit this provided form, making any necessary updates from their Phase 1 planning grant submission.

Cover Letter: This letter should be signed by the applicant's board chair and most senior organizational leader (e.g., superintendent of a district, principal of an independent charter school, etc.) and express support for and a commitment to provide oversight of the programs or projects described in the accompanying proposal.

Summary Paragraph: A proposal should include a brief summary of the proposed programs or projects and what the applicant expects to accomplish.

Proposal Narrative: This is a narrative description of no more than eight (8) pages that fully describes the programs or projects that the applicant will implement and why the applicant is confident that the programs or projects will improve academic achievement or the prospects for post-secondary success for students. A complete Proposal Narrative should provide and integrate key information such as:

- A description of how the proposal is informed by the activities conducted under the planning grant and, if applicable, by input from various, diverse stakeholders (e.g., students, families, staff, community organizations, local residents).
- A description of the challenges and opportunities that the applicant seeks to address through the proposed programs or projects.
- A detailed description of the programs or projects that the applicant seeks to initiate, enhance or expand through its Phase 2 implementation grant.
- A summary of which of the three priorities of the initiative on page 3 of this RFP the proposal addresses. (A proposal may address more than one priority.)
- A description of ways in which the proposal addresses the initiative's required elements provided on page 4 of this RFP.
- An explanation of the rationale for the programs or projects described in the proposal and a summary of convincing research or other evidence supporting why the applicant is confident that they would be effective in improving academic achievement or the prospects for post-secondary success for students.
- A description of how the programs or projects will be executed, including details about who will lead the implementation of the programs or projects. If multiple programs or projects are included, the description should include how the programs or projects are related and will be implemented in a cohesive and strategic way.
- If applicable, a description of any other organizations that will collaborate with the applicant in the implementation of the proposed programs or projects and details on each organization's role in such implementation.
- Key challenges and/or risks associated with the programs or projects and how the applicant plans to address and/or mitigate any such challenges and/or risks should they occur.
- Information about how the applicant will evaluate or assess the impact of the programs or projects, both during and at the conclusion of implementation.
- An estimate of the number and description of people (students, families, etc.) who would benefit from the programs or projects.
- A description of any elements of the programs or projects that, if successful, will be sustained following the grant period and, if applicable, the sources of funding that will be used to sustain these elements.

Timeline: A timeline of no more than three (3) pages for implementation of the proposed programs or projects using the Phase 2 Implementation Timeline Template should be included.

Outcomes: In this section, an applicant should thoroughly describe as set forth below, in narrative form or through tables or charts, 1) the expected outcome(s) for the proposed programs or projects, 2) the performance indicators that will be used to track progress toward those outcome(s), and 3) convincing research or other evidence that the described programs or projects will in the near- or long-term lead to improved academic achievement or post-secondary success for students.

- Describe the outcome(s) that the organization expects will result from the proposed programs or projects. The described outcome(s) may be quantifiable or qualitative, and the applicant should indicate how they will be measured or assessed. The applicant should provide baseline data and a timetable for the achievement of the expected outcome(s). Depending on the nature of the proposed programs or projects, applicants may take one or both of the following two approaches to establishing the expected outcomes.
 1. If the applicant's proposed programs or projects can reasonably be expected to result in measurable improvement to academic achievement or post-secondary success before the end of grant period (June 30, 2030), these expected improvements should be detailed in the stated outcomes.
 2. If the applicant's proposed programs or projects are of such nature that it would be unreasonable to expect measurable improvement in academic achievement or post-secondary success within the grant period, the applicant should identify quantifiable or qualitative outcomes that it does expect to reach during the grant period that, based upon convincing research or other evidence, are predictive of or show promise to positively affect future academic achievement or post-secondary success.

The second approach is likely appropriate for programs or projects that focus on addressing non-academic challenges or opportunities that, based on research or other evidence, show promise to affect academic achievement or the prospects for post-secondary success (e.g., mental health support, chronic absenteeism), as well as for programs and projects that focus on longer-term outcomes (e.g., post-secondary degree or credential attainment, employment rates) that may not be observed or measured within the grant period or while the students are enrolled in the applicant's school(s).

- Describe the performance indicators that the applicant will track throughout the implementation of the proposed programs or projects that will indicate the extent to which the applicant is making progress toward expected outcomes. These performance indicators may be quantitative or qualitative and the applicant should indicate how they will be measured or assessed. It will be common for an applicant to establish multiple performance indicators for a single outcome. The applicant should provide baseline data and a clear timetable for measuring or observing each performance indicator.
- Identify and describe the evidence (e.g., published research, successful prior implementation of programs or projects, pilot experiments that achieved impressive results) that makes the applicant confident that the proposed programs and projects will lead to the expected outcome(s) relating to near- or long-term academic achievement or post-secondary success. Include citations of any such research or evidence that is published.

Line-Item Budget, Summary Budget and Budget Narrative: A Line-Item Budget and Summary Budget should be completed using the provided Budget Guidance and Template and should detail the costs associated with an applicant’s proposed programs or projects. The Budget Narrative is an accompanying document of no more than two (2) pages that describes each budget line item and explains how it was calculated. The narrative should also include a brief description of sources of funding, amounting to at least 20 percent of the proposed program or project expenses, that have been identified, awarded or will otherwise be obtained or provided by the applicant to support the proposed activities, including government, philanthropic or other private support.

Appendices: If desired, an applicant may submit up to 15 pages of additional information about the programs or projects detailed in the proposal, such as planning grant findings, research citations, letters of support or sample program materials. If an applicant’s proposed programs or projects involve one or more collaborators, a letter of support from each collaborator must be included in the applicant’s appendix. Letters of support may also be included from organizations that endorse an applicant’s proposed programs or projects. Do not include additional information as hyperlinks. Endowment staff may only review appendices included within the single PDF proposal submission.

Financial Statements for the Most Recent Fiscal Year: An applicant should include their most recent audited financial statement or similar report.

Phase 2 Submission Instructions

Implementation proposals and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative’s webpage](#). See page 15 for the Grants Submission Checklists and Deadlines. Proposals will be accepted and reviewed **on a rolling basis up to no later than 12 p.m. (ET) on Friday, February 14, 2025.**

Continue to page 11 for Phase 3 information.

Phase 3 Competitive Grants: Stage 1 Concept Papers

Eligible school districts, charter schools and charter school networks are invited to participate in the first stage of Phase 3's competitive process by submitting a concept paper. A concept paper should provide a summary of the programs or projects that the applicant would seek to implement if awarded a competitive grant to be used for up to a five-year period. It should describe programs or projects that would be of significant scale and are likely, based upon convincing research or other evidence, to have considerable impact on student academic achievement or the prospects for post-secondary success. Although it is not necessary at this stage to have determined with absolute certainty every detail of a concept, the concept paper should include a clear rationale for the proposed activities.

The amount of each Phase 3 competitive grant for which an applicant is eligible will be calculated based on the number of K-12 students enrolled at the applicant's school(s) on the Fall 2023 count day (Monday, October 2, 2023) as submitted to IDOE for its average daily membership (ADM) count and shared publicly on the [IDOE Data Center & Reports website](#). Accounting for this number, an applicant may submit a concept that describes plans for programs or projects up to the funding level included in the table below, provided that requested funding does not exceed 80 percent of expenses associated with proposed projects or programs.

K-12 ADM Count on October 2, 2023	Competitive Grant Size
Up to 150	Up to \$2,000,000
151 - 400	Up to \$7,500,000
401 - 1,400	Up to \$15,000,000
1,401 - 5,000	Up to \$25,000,000
5,001 - 15,000	Up to \$30,000,000
More than 15,000	Up to \$40,000,000

These grant amounts are to be used as a guide for an applicant as they prepare a concept paper for Phase 3. The Endowment reserves the right to adjust the amount of any requested grant based on a proposal's potential for scale and impact and other factors once the Endowment has an opportunity to review concepts and better understand the nature of the proposed programs or projects.

Phase 3 Guidelines

A concept paper should be organized as follows and include the elements listed below.

Applicant Information Form: An applicant must resubmit this provided form, making any necessary updates from their Phase 2 implementation grant submission.

Cover Letter: This letter should be signed by the applicant's board chair and most senior organizational leader (e.g., superintendent of a district, principal of an independent charter school, etc.) and express their support for and a commitment to provide oversight of the proposed programs or projects described in the accompanying concept paper narrative.

Summary Paragraph: A concept paper should include a brief summary of the concept and what the applicant expects to accomplish.

Concept Paper Narrative: This is a narrative description of no more than five (5) pages that describes the programs or projects that the applicant seeks to implement and why the applicant is confident that it is a compelling concept that aligns with the initiative's aim. In drafting its concept paper, an applicant should include information that is responsive to the initiative's priorities and required elements noted previously on pages 3 and 4 of this RFP. Additionally, the concept paper narrative should provide and integrate key information, such as:

- A description of how the concept is informed by the activities conducted under the planning grant and by input from various, diverse stakeholders (e.g., students, families, staff, community organizations, local residents).
- A description of challenges and opportunities that the applicant seeks to address through the proposed programs or projects.
- A description of the programs or projects that the applicant seeks to initiate, enhance or expand through a Phase 3 competitive grant.
- A description of how the programs or projects will be executed, including details about who will lead the implementation of the programs or projects.
- A summary of convincing research or other evidence supporting the applicant's assertion that the concept will improve academic achievement or the prospects for post-secondary success.
- If a concept includes multiple programs or projects to address the identified challenges or opportunities, a description of how the programs or projects are related and will be implemented in a cohesive and strategic way.
- An estimate of the number of people (students, families, etc.) who would benefit from the concept.
- Information about how the applicant will evaluate the impact of the programs or projects and what specific improvements or changes the applicant expects to achieve through their implementation.

Summary Budget and Summary Narrative: A Summary Budget should be prepared, along with a summary narrative of the expected costs associated with an applicant's proposed concept. It is not necessary, at this stage, that the budget be fully detailed. The Summary Narrative should, in addition to describing expected costs, include a brief description of sources of funding, amounting to at least 20 percent of the proposed program or project expenses, that have been identified, awarded or will be obtained or provided by the applicant for the proposed activities, including government funding and/or philanthropic or other private support.

Appendices (optional): If desired, an applicant may submit up to five (5) pages of additional information about the programs or projects detailed in the concept paper such as planning grant findings, research citations, letters of support or sample program materials. Do not include additional information as hyperlinks. Endowment staff may only review appendices included within the single PDF concept paper submission.

Phase 3 Submission Instructions

Concept papers and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative's webpage](#). See page 15 for the Grants Submission Checklists and Deadlines. Concept papers are due **by 12 p.m. (ET) on Monday, April 7, 2025**.

Concept Paper Evaluation Criteria and Timeline

Each concept paper submitted for the Phase 3 competitive stage will be judged on its own merit and against the pool of other submitted concept papers. In evaluating each concept paper, the Endowment may consider, among other criteria, the extent to which:

- The concept addresses one or more of the initiative's priorities on page 3 of this RFP.
- The concept addresses the required elements on page 4 of this RFP.
- The concept is feasible.
- The applicant's rationale for why the concept shows promise to improve significantly academic achievement or the prospects for post-secondary success is convincing.
- The concept grant amount is proportional to the scale and envisioned impact of the concept.
- The concept budget and summary narrative describe a credible approach to funding at least 20 percent of the concept expenses from other funding sources.
- A concept that includes multiple programs or projects to address the identified challenges or opportunities is cohesive and strategic.

Once concept paper submissions have been reviewed by the Endowment, a subset of the applicants that submitted the most compelling and promising concepts may, in the Endowment's sole discretion, be invited to participate in the second stage and submit a full Phase 3 proposal for competitive funding.

Applicants invited to participate in Phase 3's second stage will have the opportunity to meet with Endowment staff to discuss their concepts. Such meetings will occur in May or June 2025. The Endowment expects that Phase 3 proposals will be due in August 2025, at a date specified by the Endowment during its second stage meeting with each invited applicant. Additional guidance for Phase 3 proposals will also be provided at this time. Please note that the second stage will also be a competitive process, and an invitation to participate does not mean an applicant will receive a Phase 3 competitive grant.

Notification and payment of grant awards are expected to be made in December 2025.

Continue for additional information about the initiative.

Additional Information About the Initiative

Marion County K-12 Public Schools Information Sessions: The Endowment plans to host three in-person informational sessions to provide an overview of the initiative's aim and phases and answer questions about and elaborate on this RFP. Eligible applicants may designate up to three representatives to attend one of these sessions (dates and times listed below) and all attendees must register via the [initiative's webpage](#). For public school districts, designated attendees should include the superintendent and up to two other representatives. For charter schools and charter school networks, designated attendees should include the executive director or principal and up to two other representatives. To accommodate schedules, designated representatives from one applicant may attend different sessions. Event details may be found within the online link for each session. Please note that information sessions will not be recorded.

- Friday, August 23 from 10-11:30 a.m. (ET)
- Monday, August 26 from 8:30-10 a.m. (ET)
- Thursday, August 29 from 4:30-6 p.m. (ET)

Resources:

Education Data and Research: The Endowment has compiled in a document accompanying this RFP a non-exhaustive list of resources that identify promising strategies that may help improve academic achievement or the prospects for post-secondary success. Applicants may consult these and other resources they identify to assist them in the preparation of proposals.

Project and Program Examples: As noted previously, the Endowment expects that applicants will present a wide array of programs and projects for implementation and competitive grant funding. To illustrate the breadth of possible approaches applicants may propose, the Endowment has prepared the accompanying Programs and Projects Examples document providing examples of programs and projects that could be viewed as effectively addressing the aim of the initiative and one or more of its priorities if well developed and supported by convincing research or other evidence.

These resources may be found within the Application Packet and online in the Resources section of the [initiative's webpage](#) on the Endowment's website.

Questions: Please email questions related to the Marion County K-12 Public Schools Initiative to K12initiatives@lei.org.

Grants Submission Checklists and Deadlines

Phase 1 Planning Grants: Due by 12 p.m. (ET) on Friday, September 13, 2024. The planning grant Letter of Request and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative's webpage](#).

- Letter of Request - no more than two (2) pages
- Applicant Information Form
- Exempt Status and Charity/Foundation Status Information Form
- IRS Exempt Status Determination Letter (if applicable)

Phase 2 Implementation Grant: Due by 12 p.m. (ET) on Friday, February 14, 2025. Implementation proposals and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative's webpage](#).

- Applicant Information Form
- Cover Letter
- Summary Paragraph
- Proposal Narrative - no more than eight (8) pages
- Timeline - no more than three (3) pages
- Outcomes
- Line-Item Budget
- Summary Budget
- Budget Narrative - no more than two (2) pages
- Appendices (optional) - no more than 15 pages
- Financial Statements for the Most Recent Fiscal Year

Phase 3 Competitive Grants: Stage 1 Concept Papers: Due by 12 p.m. (ET) on Monday, April 7, 2025. Concept papers and accompanying materials should be saved as a single PDF and submitted through the online form on the [initiative's webpage](#).

- Applicant Information Form
- Cover Letter
- Summary Paragraph
- Concept Paper Narrative - no more than five (5) pages
- Summary Budget
- Summary Budget Narrative
- Appendices (optional) - no more than five (5) pages