

## INVESTMENT DOCUMENT – GRANT

We appreciate your interest in submitting a proposal to the Bill & Melinda Gates Foundation and we thank you for working with us throughout the proposal process. Your designated foundation contact will collaborate with you as you prepare your proposal and respond to any questions you might have over the course of this process. You are encouraged to communicate with your Investment Owner to make sure that your efforts are aligned with the proposal requirements and that you are not expending unnecessary time or energy in this process. Please note our standard [grant terms and conditions](#).

- This is a proposal shaping document and not a commitment by the foundation to fund the work.
- Following execution of a grant agreement, the final Proposal Narrative and Budget will become incorporated into that grant agreement by reference.
- Due to tax, legal, and reporting requirements, all proposals must be submitted in English. The proposal must be submitted in Word, as PDFs will not be accepted.
- Please ensure each section of the proposal is complete

## SECTION A – INVESTMENT DETAILS

### General Information - Gates Foundation Staff to Complete

Investment Name			
Investment Record ID		Investment Owner	
Investment Coordinator		Investment Owner Title	

### General Information - Grantee to Complete

Estimated Start Date	July 1, 2021	End Date	July 1, 2022
Requested Amount (U.S.\$)	370,323	Total Project Cost (U.S. \$)	370,323
Organization Legal Name <sup>1</sup>	Howard University Public Charter Middle School of Mathematics and Science		
Organization Doing Business As/Trade Name <sup>2</sup>			
Tax Status (if known and applicable) <small>Refer to <a href="#">Tax Status Definitions</a></small>	Exempt	U.S. Employer Identification Number (EIN) (if applicable)	58-2677214
Mailing Address		Primary Contact Name	Kathryn Procope
Street Address 1	405 Howard Pl NW	Primary Contact Title	Head of School
Street Address 2		Primary Contact Email	kprocope@hu-ms2.org
Street Address 3		Primary Contact Phone	202-865-0281
City	Washington	Additional Contact	Corbet Houston
State / Province	DC	Additional Contact Email	corbet.houston@hu-ms2.org
Zip / Postal Code	20059	Authorized Signer Name	Kathryn Procope
Country	United States	Authorized Signer Title	Head of School
Website (if applicable)	<a href="https://hu-ms2.org">https://hu-ms2.org</a>	Authorized Signer Email	kprocope@hu-ms2.org

<sup>1</sup>Legal Name will be used in the agreement and should match the name on the bank account that receives the grant funds (assuming fully executed agreement).

<sup>2</sup>Trade Name or d/b/a (“doing business as”) only required if different from Legal Name

<b>Proposal Completed/ Date Submitted</b>	5/14/2021	<b>Organization’s Total Revenue for Most Recent Audited Financial Year (U.S.\$)</b>	\$774946
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**Strategic Fit - Gates Foundation Staff to Complete**

The following includes the foundation’s 3-5-year strategic goal(s) towards which the investment contributes most directly. Also addressed here:

- How this investment contributes to the strategic goals that are listed.
- How this investment relates to others (current or future) in the Portfolio.

**Instructions to Complete:**

Please do not edit the text in this section.

In Balance the Equation, the Bill & Melinda Gates Foundation’s first-ever U.S. education Grand Challenge, we seek to identify partners to design solutions to make Algebra 1 more accessible, relevant, and collaborative for students who are Black, Latino, English Learners, and/or experiencing poverty.

Aligned Bodies of Work and Goals:

1) Coherent Instructional Systems:

- Availability: Increase the supply of high-quality, adoptable, equitably designed products for all elements of a Coherent Instructional System.

2) Middle Years Math:

- Availability and Access: Increase availability and access to “breakthrough solutions” that meet cost, ease of use, and other constraints, to enable easy uptake.

This investment will be one of eight-to-ten investments that are made in Phase 2 across two cohorts. The end goals of Phase 2 are:

- A final set of grantees who demonstrate measurable and, ideally, profound impact on key outcomes in pilots.
- A set of learnings from across grantees about the features of approaches that can achieve key outcomes for students and teachers.

**Project Overview - Gates Foundation Staff and Grantee to Collaborate**

Please provide or expand upon the information provided in the narrative space below:

- What is the primary outcome(s) or result(s) this investment will achieve or significantly contribute to? How will You know when that result(s) has been achieved (how will the result be measured)? If sustainability is a component of proposed outcomes, please describe the vision of long-term sustainability of this Project. Consider the economic/financial, organizational or behavioral factors to sustain outcomes beyond this project’s time frame and funding.

- Describe the approach You will take to achieve the intended results of this Project: a) Overall Scope of Work b) Timing and/or phases, and c) Narrative of resource needs to support the budget (ex: people, capabilities, technical expertise, experience, specific assets, including any external collaborators/contributors to the Project).
- Describe potential risks/challenges to the success of this Project and how You plan to address them. Include any external factors or critical relationships with other partners/projects that may influence the success of this project (including any anticipated agreements to be entered into for purposes of the Project).
- Describe any changes or improvements You plan to make to Your organization's capacity to undertake or achieve the outcomes of the proposed investment.

The foundation requires that funded projects are conducted and managed in a manner that will ensure a positive, sustainable impact on the foundation's intended beneficiaries. Please provide a response to each question in the bullets below, highlighting how Your management of the project described in this Investment Document (the "Project") and the intended outcomes align with the Strategic Fit, Charitable Purpose, and the foundation's Global Access requirements.

**Instructions to Complete:**

For this section, the majority of what you will add will be a straight copy and paste from sections of your Pilot Study Plan template, unless otherwise specified in blue highlights.

**Background Information**

Please mark with an "X" in the appropriate blank for each question in the table below.

<b>Cohort:</b> Which cohort are you applying for? Please select one.	<b>Priority Student Focus:</b> Which priority student groups will use your solution? Select all that apply.	<b>Student Gender:</b> Does your solution have a specific focus on girls? Please select one.	<b>Student Grade:</b> Which grade(s) is your solution meant for? Please select one.	<b>Area of Focus:</b> Which Area(s) of Focus does your solution address? Select all that apply.
<input checked="" type="checkbox"/> Cohort 1 Only	<input checked="" type="checkbox"/> Black	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 7 <sup>th</sup> grade	<input type="checkbox"/> Builds Out Support Systems
<input type="checkbox"/> Cohort 1, But Would Be Open to Cohort 2	<input type="checkbox"/> Latino	<input type="checkbox"/> No	<input checked="" type="checkbox"/> 8 <sup>th</sup> grade	<input checked="" type="checkbox"/> Improves Relevance of Algebra Content
<input type="checkbox"/> Cohort 2 Only	<input type="checkbox"/> English Learners	If so, please select one.	<input type="checkbox"/> 9 <sup>th</sup> grade	<input type="checkbox"/> Elevates Understanding of Math Language
	<input type="checkbox"/> Students Experiencing Poverty	<input type="checkbox"/> Black girls	<input type="checkbox"/> Combination/All	<input checked="" type="checkbox"/> Empowers and Strengthens Teacher Practices
		<input type="checkbox"/> Latina girls		<input type="checkbox"/> Develops New and Better Feedback Mechanisms
		<input type="checkbox"/> Both Black and Latina girls		

**1. Description of Solution**

- **Articulate the Problem**

Black girls are frequently overlooked in the mathematics classroom, which contributes to their ambivalence towards learning mathematics, an attitude that tends to persist throughout their academic careers. While middle-grade black girls consistently demonstrate resilience generated from the emotional and physical transformations that they undergo as adolescents, they often experience unmet academic needs and their identities are not validated in the classroom where their teachers focus more on their behavior and social-emotional concerns. The results from NAEP in 2015 confirmed that only 16% of Black girls were

*considered proficient by 8th grade in mathematics. Proficiency means that they are able to synthesize their understanding of mathematics concepts.*

*Black girls do not feel empowered and are often dehumanized in the mathematics classroom because the Algebra curriculum does not relate to their specific experiences. The inability to connect with the Algebra content prohibits the girls' development of an appreciation of mathematics.*

*Black girls are being left behind in mathematics due to the lack of intersection between mathematics curriculum and their identities resulting in fewer pursuing degrees in mathematics and careers in STEM. By creating and implementing a curriculum that addresses who Black Girls are at a micro level, a curriculum that incorporates their interests and concerns the results will be that Black girls will have a more inclusive experience with mathematics, that will have long-term results.*

- **Activity Description and Focus**

- Our solution is a 21-week Algebra program, delivered daily during one-hour block Algebra class, designed to provide Black girls with an inclusive instructional experience that affirms their identities and engages them more deeply in mathematics. The solution is instructional modules, that include warm-ups, practice, assessments, reflections and, teacher training, that address Black Girls' interests and concerns including but are not limited to Black Hair, Colorism, race and, gender equality. The solution will align to the Illustrative Math Algebra 1 (IM) and will improve mathematics efficacy and engagement through an intersectional focus on Black Girls' experiences, interests, culturally focused issues, and Algebra concepts

- **Alignment to Existing High-Quality Curriculum**

- *The solution aligns to Algebra 1, Illustrative Mathematics*
- *Curriculum Description: <https://curriculum.illustrativemathematics.org/HS/teachers/1/index.html>*
- *EdReports review: <https://www.edreports.org/reports/overview/kendall-hunts-illustrative-mathematics-traditional-2019>*
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- **Responding to Priority Student Communities and Changing Existing Practice**

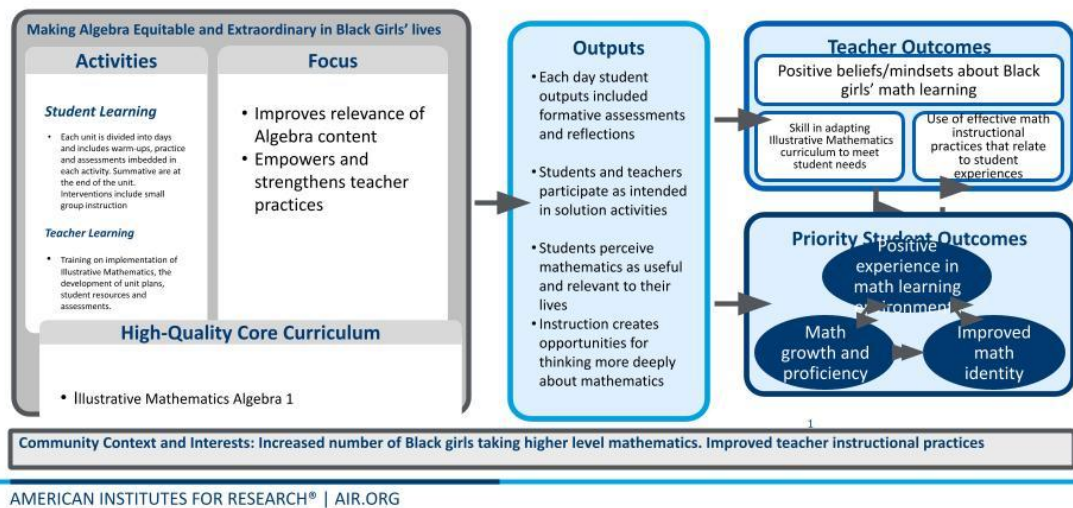
- *Based on survey and interview responses, Black girls feel marginalized in their mathematics classes. The common theme from their responses is that there is no intersectionality between the mathematics being taught and the identity of Black girls. Algebra classes support gender isolation because the application of concepts rarely relates to issues or topics that speak to the identity of Black girls. Our solution will be different because we are looking specifically at the application of the concepts and taking the input from the Black girls and their experiences and interests and incorporating these interests into the curriculum.*
- *For instance, in the current Illustrative Mathematics Linear Algebra Unit, the second activity talks about the feeding operation that a zookeeper has to prepare for feeding a snake. This is of no interest to most Black girls. Our solution would instead be an activity to correspond with the notice and wonder activity where a young girl is considering changing her hair and she is going to add micro-braids. She is preparing to make the necessary purchase and with a parent, choose a stylist. She has to determine how much she needs to buy based on the style she wants. This developed activity will create a conversation between the girls because they can all relate to each other. It is a lead in conversation to a discussion around implicit biases towards Black women's hair.*

Please copy and paste your responses to all Section 1 questions/prompts here.

**2. Theory of Action (TOA) and Evidence of Solution**

- Insert a copy of your customized ToA below and use the description of your solution that you provided in Section 1 as a basis to summarize your ToA. Make sure to describe how the activities and their intended BTE Area(s) of Focus produce the intended outputs, and teacher and student outcomes.

Balance the Equation Theory of Action



Through the implementation of our solution, Black girls will become more involved in learning mathematics because they can relate to what they are learning. Through our solution's facilitated lessons, activities, and assessments, Black girls will participate more in class, and allow the teacher to take them deeper into mathematics exploration. Growth and proficiency in mathematics will be a natural consequence of this solution. The girls in the classroom will develop a sense of purpose and with their improved mathematics proficiency and disposition will ultimately consider STEM as a career and pursue higher education and higher-level mathematics education. As the Black girls become more engaged in learning mathematics, teachers evolve from deficit mindsets to growth mindsets and adapt instructional practices that encourage exploration and learning.

*\*Note to Phase 1 Grantees: We greatly appreciate you taking the time in Section 2 to identify your learning questions and complete the tables with positive or mixed evidence in Appendix A as part of your Pilot Study Plan. Please know that we will also be reading and reviewing these.*

**3. Design and Sampling**

- What is the phase 2 study design?

*The phase 2 study design will be correlational. We will use data at the beginning of the school year to assess student academic levels in algebra using student growth norms from NWEA Measures of Academic Progress, and we will correlate that data with the spring administration of the assessment.*

- If the phase 2 study includes a comparison group, what will participants in the comparison group experience (e.g., business-as-usual or an alternative version of the solution)?

*This phase does not include a comparison group*

- How will the group that experiences the solution and the group that does not experience the solution (i.e., the comparison group, if included in the study design) be identified?

*The groups that experience the study will be composed of a specific cohort of students who will be identified at the beginning of the school year. They may be in the same classes as students who are not participating in the study. The teachers will group the students and apply the study to the specific group.*

- Approximately how many students and teachers will be in each study group? (Note: the exact sample size for the phase 2 study will depend on recruitment results and participant consent).

*The study will involve 70 girls and 4 teachers.*

- In which district(s) and schools will the phase 2 study take place?

*The study will take place in the Howard University Middle School during daily mathematics classes.*

- (If schools have already been identified for the phase 2 study) What are the enrollment size and demographic characteristics of students in participating schools?

1. *The current school enrollment is 288 students. Student demographics are as follows:*

- 92.1% African American students*
- 6.4% Hispanic/Latino students*
- .35% Two or more races*
- 41% Female, 59% Male*
- 53% At-Risk*
- 98% qualify for Free or Reduced Lunch*

### **Measures and Data Collection**

- How will you measure student outcomes, particularly mathematics growth and proficiency? (please refer to the BTE Outcomes Measures for survey measures of positive experience in mathematics classrooms, positive identity as mathematicians, and proficiency and growth)

*Student outcomes will be measured in the following ways:*

- *Before and after surveys will measure student identification as mathematicians and their experiences in mathematics*
- *NWEA Measures of Academic Progress will measure student proficiency in mathematics. Students will take the MAP assessment in the fall, winter, and spring and their growth in Algebra will be assessed.*

- How will you measure teacher outcomes?

*Teacher outcomes will be measured in the following ways:*

- *Before and after surveys will measure teacher beliefs about teaching culturally relevant mathematics particularly to Black girls.*
- *The Danielson Framework for Teaching Domain 3: Instruction, Component 3c: Engaging Students in Learning will be used to measure teacher outcomes. The elements of this domain include activities and assignments, a grouping of students, instructional materials and resources, structure, and pacing (Danielson, 2007, 83-85).*



- How will you measure the implementation of the solution? Will you conduct interviews and/or focus groups? With teachers and/or students? Will implementation data be collected from external providers? Will you be able to collect user data from technological platforms?

*Solution implementation will be measured in the following ways*

*Student focus groups will participate in empathy interviews before and after the implementation. Students will meet with the Dean of School Culture and discuss their experiences within their mathematics class, discuss their aspirations and expectations from school and in particular their mathematics classes. Data will be collected from the interviews. Teacher focus groups will also participate in empathy interviews before and after implementation of the solution. Teachers will discuss their expectations in mathematics class, their experiences with the solution, and their suggestions for improvements. Data will be collected from these interviews. Focus groups will be videotaped and the qualitative data analyzed.*

*Surveys will be conducted using SurveyMonkey to assess student and teacher experience with the implemented solution*

- What components of your ToA will be measured? Which will not and why?
  - All components of the TOA will be analyzed and measured with this solution.
    - Teacher beliefs and mindsets about Black Girls in mathematics class
    - Black Girls' experiences in mathematics class
    - Improved relevance of Algebra content
    - Improved math identity in Black Girls
    - Improved mathematics/Algebra proficiency in Black Girls
- How will your measurement and data collection activities incorporate the Bill & Melinda Gates Foundation's [Equity Principles for Data and Research Investments](#)? Provide specific examples.
  - Evidence from Communities impacted by the work - measurement framework

### **Justification of the Approach**

*Research shows that the identities of Black girls in the mathematics classroom are affected by instruction that is relevant to their experiences and through treatment by teachers that validates who they are as people (Diemer et al., 2016).*

*Our solution is based on research done on Black girls in urban settings in their mathematics classes. When curriculum content encourages social interaction and finds ways for Black girls to interweave their own personal stories, they will feel valued and engage more actively in learning mathematics (Joseph, N. 2019)*

### **Authentically represent and understanding the communities that we serve**

*When students feel that they are a part of the learning community, and that their voices are heard, they are more engaged in the community. Black girls often feel invisible in their mathematics classroom feeling like mathematics is being done to them instead of with them. (Fredericks, J. A. et al, 2018)*

### **Risks/Challenges and Mitigation**

- Describe potential risks/challenges to the success of this project and how you plan to address them. Include any external factors or critical relationships with other partners/projects that may influence the

success of this project (including any anticipated agreements to be entered into for purposes of the project).

*Because this project is being conducted in our school during our regularly scheduled mathematics classes, the risks to its success are minimal. The risks and challenges that we anticipate will be the ones that we address on a regular basis. They include student and staff attendance, mathematics proficiency, the need for academic interventions, enrollment. Mitigation strategies for these risks include attendance monitoring and intervention plans implemented by our student support team. SST (Student Support Team) meetings will address mathematics proficiency and intervention issues. During SST meetings, student challenges are addressed by a team, and interventions are developed and implemented with the support of the student's parents. Teacher attendance issues, when they arise, are mitigated through improvement plans and monitoring. The agreements with consultants and outside contractors are carefully monitored and our mathematics coach will provide support should it be needed.*

### Capacity

- Describe any changes or improvements you plan to make to your organization's capacity to undertake or achieve the outcomes of the proposed investment.

Our summer training for our mathematics teachers will focus on acknowledging deficit mindsets, particularly for Black girls, on listening to student voices, and on instructional practices that incorporate experiences that are relevant to Black girls and their identities. This training will expand to all content area teachers. Our mathematics instructional coaches will tailor their observation and feedback to focus on how teachers are interacting with students, particularly Black girls, and how students are cognitively engaged in activities and assignments, how they are exploring the content, and the productivity of instructional groups. We will incorporate teacher training that specifically focuses on engaging students in learning and includes student surveys and empathy interviews.

### For Cohort 2 Applicants Only

- What additional product development would you complete during SY 21-22?
- What additional field-testing would you complete during SY21-22?

Please write your responses here.

### Public Description - Gates Foundation Staff to Complete

The following describes the charitable purpose of this work. It is written in a standard format so that it can be included on tax forms and published to the foundation's public website.

To pilot and measure the effectiveness of solutions geared towards Algebra 1 success; making Algebra 1 more accessible, relevant, and collaborative for students who are Black, Latino, English Learners, and/or experiencing poverty.

### Investment Results - Gates Foundation Staff and Grantee to Collaborate



Provide specific details on the outcomes this investment will achieve (including those that define what success is for the investment), and the key outputs that signal whether the investment is on track. Add more rows, as needed.

“Outcome” is the ultimate or overall change(s) in-systems, populations or behaviors the investment seeks to achieve within the context of the investment timeframe; tells us what success looks like for the investment.

Outcome Number	Outcome Description	Target Completion Date	Actual Completion Date	Payment Contingency
1	<b>Gather Evidence for Student and/or Teacher Impact:</b> Conduct the Pilot Study (according to the Pilot Study Plan) with 1 school and approximately 70 students in 8th grade who are primarily Black, Latino, and/or experiencing poverty during the SY21-22.	6/1/2022		
2	<b>Documentation and Dissemination of Results:</b> Develop, publish, and disseminate a free <a href="#">CC-BY white paper</a> to the field (targeting developers and educators) on what we learned in this project, the solution build, and the results of testing the solution	7/1/2022		
3	<b>A Pathway to Scale:</b> Document initial draft set of constraints that solution must meet to be adaptable in a range of education contexts, including cost, implementation requirements, the potential for integration with other solutions, etc.	8/1/2022		

“Output” or “Funded Development” means the products, services, processes, technologies, materials, software, data, other innovations, and intellectual property resulting from the Project (including modifications, improvements, and further developments to Background Technology). Note: You will be required to disclose and update Intellectual Property (IP) and include any links to applications, filings, or registrations, as applicable, in future progress report(s).

Output/Funded Development Number	Output/Funded Development Description	Target Completion Date	Actual Completion Date	Payment Contingency	Third-Party agreement required? If yes, by when?	Will any IP rights be filed/generated?
1	Curriculum development - Unit plan, activities, assessments for Linear Equations and Inequalities Unit	7/30/2021			No	No
2.	Teacher Training Materials for the Linear Equations and Inequalities unit	8/1/2021			No	No
3	Conduct teacher training for implementation of Linear Equations and Inequalities unit	8/16/2021				
4	Curriculum development - Unit plan, activities, assessments for Two variable Statistics unit	12/1/2021			No	No

5	Teacher Training materials for the Two variable Statistics unit	12/10/2021			No	No
6	Conduct teacher training for the implementation of the Two Variable Statistics Unit	1/4/2022				
6	Curriculum development - Unit plan, activities, assessments for the Functions Unit	2/1/2022			No	No
7	Teacher training materials for the Functions unit	2/15/2022			No	No
8	Conduct teacher training for implementation of the Functions Unit	3/4/2022				

### Global Access/Impact for Foundation’s Beneficiaries – Grantee to Complete

To ensure a positive impact on the foundation’s intended beneficiaries, the foundation requires that all Projects and outputs be managed to ensure Global Access. You will be requested to update the responses below, as may be applicable, in future progress reports.

“Global Access” is a foundation policy requiring that: (a) the knowledge and information gained from the Project will be promptly and broadly disseminated; and (b) the Funded Developments will be made available and accessible at an affordable price (i) to people most in need within developing countries, or (ii) in support of the U.S. educational system and public libraries, as applicable to the Project.

“Funded Developments” means the products, services, processes, technologies, materials, software, data, other innovations, and intellectual property resulting from the Project (including modifications, improvements, and further developments to Background Technology).

“Background Technology” means any and all products, services, processes, technologies, materials, software, data, or other innovations, and intellectual property created by You or a third party prior to or outside of the Project used as part of the Project.

- a) How will You disseminate the knowledge and information arising from the Project? (For peer-reviewed publications see our [Open Access policy.](#))

We will develop, publish, and disseminate a free [CC-BY white paper](#) to the field (targeting developers and educators) on what we learned in this project, the solution build, and the results of testing the solution

- b) How will You ensure affordable and meaningful access to the Funded Developments arising from the Project (and Background Technology, if any)?

All materials developed will be available for download from our school website. A link to all materials will be part of the knowledge-sharing white paper.

- c) Do You foresee any obstacles to achieving Global Access (e.g., third-party rights, restrictions on Background Technology, time frame, affordability)?

No

Yes  (please explain and describe the specific steps that You will take to address them).

- d) Please confirm that You will make available for Global Access purposes the Funded Developments and any Background Technology that is (i) owned, controlled, or developed by You, or in-licensed with the right to sublicense; and (ii) either incorporated into a Funded Development or reasonably required to use the Funded Development. See the Global Access terms located in the foundation’s [grant terms and conditions.](#)

Confirmed

Not confirmed  (please explain)

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## SECTION B – BUDGET INFORMATION

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*The purpose of the budget narrative is to supplement the information provided in the Excel-based budget template by justifying how the budget cost elements are necessary to implement Project activities and accomplish target outcomes. The budget information section is used to help foundation staff fully understand the budgetary needs of the Project and is an opportunity to provide descriptive information about the key costs and risks that can't be easily communicated in the budget template. Together, this budget narrative and Excel budget should provide a complete quantitative and qualitative description that supports the proposed budget. The description provided in the budget template should be very brief. Please use this budget narrative to provide a thorough description of Your budget and only complete questions that are relevant to Your proposal.*

*For U.S. Programs, Communications and Family Interest related grants, include the following guidance: If your proposal includes any sub-grants that represent 25% or more of the total grant amount OR sub-grants that are greater than \$1 million USD, please complete a separate budget template and narrative for each organization.*

### Budget Summary - Grantee to Complete

**Please explain the major cost drivers and how costs relate to planned activities and target outcomes. Also explain any potential risks in spending as budgeted and any plans to mitigate those risks.**

**If budgeting by outcomes, or additional dimension, please explain the major cost drivers per outcome or other relevant dimension.**

The major cost drivers are the personnel (teachers, coaches, administrators) who are implementing the solution and the consultants who are developing the curriculum and providing the training. There are no anticipated risks to the spending plan.

### Detailed Budget Information - Grantee to Complete

**Personnel and Benefits:** Provide a brief explanation of personnel budgeted, including responsibilities as they relate to the grant. Also include assumptions made for any staff budgeted which are to-be-hired, including salary estimates for these personnel. Describe the components of the benefits (column R of the "Budget Details" sheet) included with the salary costs. For example: pension, health insurance, expatriate costs, etc.

**Travel:** Provide rationale for the travel budgeted and assumptions used to determine appropriate number of trips and personnel required. Also include a brief rationale for how travel costs were estimated.

**Consultants:** Provide a brief description of the work to be performed by consultants in support of the overall Project and describe any expenses that have been included.

**Capital Equipment:** Provide a brief justification and description of any items required for the Project with a unit cost of greater than \$5,000 (USD) and a useful life of more than one year.

**Other Direct Costs:** Provide a brief description and rationale for other direct costs required, including cost assumptions used to develop the budget for these costs.

The budgeted personnel includes the teachers who will implement the solution, a mathematics coach who will observe teacher instructional practices and provide feedback. The budget personnel also include the special education director to ensure that where applicable, accommodations and modifications are included in the solution for students with disabilities. Administrators will supervise the administration of all tenets of the grant. Travel is for the contractor who is working on the curriculum development and training. There are two trips to deliver in-person training and the last training will be virtual and will not require travel. The consultant and subcontractor will provide the curriculum development that is the foundation of the solution. Both have experience with the foundational curriculum as well as an understanding of Summit Learning, the platform that will be used for the pilot study. The representative from Howard University's mathematics department will provide support and content guidance to the contractor and curriculum developer. Training materials will include hard copies of the solution unit plan, activities, and assessments.

### Sub-Awards - Grantee to Complete

**List all sub-grantees or sub-contractors involved in this investment. Add more rows as needed.**

Type of Sub-Award (e.g., grant or contract)	Name	Corporate Entity Name (if applicable)	Mailing Address
Contract	Kreative Education Solutions LLC	Kreative Education Solutions LLC	5602 Lanier Ave Suitland MD 20746

If separate budgets are required (see above), please also submit a separate budget template and narrative for each sub-award.

Describe the work each organization is going to perform as well as the rationale for each organization chosen to participate on this project as a sub-grantee. If organizations are TBD, include the assumptions used to estimate cost for the sub-award and the process and timeline you will be using to select these organizations.

Note: You will be required to submit the sub-award budget once final.

Kreative Education Solutions was chosen because of their familiarity with Summit Learning and how Summit Learning integrates with Illustrative Mathematics. Their consultants are familiar with our school program and how we implement the Summit Learning platform. This knowledge is key to our Pilot implementation. Kreative Education Solutions also understands how to make our solution accessible to other platforms so that it will have a global reach.

### Indirect Cost Rate - Grantee to Complete

Briefly explain the indirect cost rate being charged on this project and the rationale and assumptions behind it.

The indirect cost rate is 7% and it includes building rent and utilities, general IT (wifi, Internet, in school and at home tablets for students and teachers), and all other tasks and activities needed to manage the school on a day to day basis. This is below the maximum of 15% rate for non-profit non-profit organizations

### Currency Exchange - Grantee to Complete

Briefly describe any foreign currency exchange exposure with this investment. Which costs included in the budget are exposed to exchange risk? How much do these costs total?

N/A

### Other Sources of Support for this Project - Grantee to Complete

If You are requesting funding from the foundation for only a portion of this Project and will depend on funds from other sources, please describe Your contingency plans if full Project funding does not become available. If You have applied for funding from other sources which overlap with the funding requested in this proposal, please indicate the nature and timing of that potential funding. Any expected in-kind contributions (e.g. drug donations, personnel time) should be included in the description.

NOTE: Names of the other sources and their expected dollar (U.S.\$) contributions should be included on the 'Financial Summary & Reporting' sheet of the budget in the Funding Plan table.

N/A

### Geography Served - Grantee to Complete

List all countries and sub-regions/states that would benefit from this work and associated dollar amounts. If areas to be served include the United States, indicate city and state. Add more rows as needed. More information about Geographic Areas to Be Served can be found [here](#).

Location	Foundation Funding (U.S.\$)
Washington DC	\$ 360,001
	\$

### Location of Work - Grantee to Complete

List all countries and sub-regions/states where this work would be performed and associated dollar amounts. If location of work includes the United States, indicate city and state. Add more rows as needed. More information about Geographic Location of Work can be found [here](#).

Location	Foundation Funding (U.S.\$)
Washington, DC	\$360,001
Nashville, TN	\$21,675
	\$381,676

Many countries, including India, Vietnam and Bangladesh, require organizations conducting activities funded with foreign funds to comply with local registrations or other requirements. These restrictions may apply to funds you subgrant under this project. Please confirm that your organization will ensure compliance with any such requirements.

Confirmed

Not applicable  (please explain) Foreign funds are not being used

## SECTION C – ROLES & RESPONSIBILITIES

### Conduct and Control of the Project - Grantee to Complete

*In answering the questions in this section, please consider all Project activities, such as those involving: confidential or protected information (including personally identifiable information or protected health information); the inclusion of children or vulnerable populations; research involving human subjects; clinical trials; post-approval studies; field trials; experimental medicine; provision of medical services (diagnostic, prophylactic or treatment); product development; use of genetically modified organisms, human tissue, animals, radioactive isotopes, pathogenic organisms, recombinant nucleic acids, select agents or toxins ([www.selectagents.gov](http://www.selectagents.gov)), dual-use technology ([http://export.gov/regulation/eq\\_main\\_018229.asp](http://export.gov/regulation/eq_main_018229.asp)), or any substance, organism, or material that is toxic or hazardous; use of aircraft, unmanned vehicle systems, drones or satellites; and the import, export, transfer, approvals, consents, records, data, specimens, images, and materials related to any of the foregoing.*

**1. Please confirm that Your organization:**

- a. will maintain the expertise necessary to conduct, control, manage, and monitor all aspects of the Project in compliance with all applicable ethical, legal, regulatory, and safety requirements including applicable international, national, state, local, and institutional, school district or school network standards and policies and is responsible for determining and complying with these requirements and standards;
- b. will not disclose any confidential or protected information to the Foundation without obtaining prior written approval from the foundation and all necessary consents to disclose such information;
- c. acknowledges that any activities by the Foundation in reviewing documents, providing input or funding does not modify Your organization's responsibility for determining and complying with all applicable ethical, legal, regulatory, and safety requirements for the Project in all places;

- d. is a government agency, public institution or multilateral organization or will otherwise maintain insurance coverage sufficient to cover the activities, risks, and potential omissions of the Project in accordance with generally-accepted standards and as required by law (for instance, general, professional, clinical trial, product liability, medical malpractice, workers' compensation, or otherwise);
- e. will not transfer any biological materials, chemicals, reagents, hazardous materials or the like to the Foundation.

Confirmed

Not confirmed  (please explain)

2. Does the Project involve regulated human subject research?

No

Yes  (If yes, please identify the name of the entity that will be conducting such research and please describe any consents, approvals or waivers needed or obtained to the extent such are necessary for compliance with applicable law.)

**Background Technology – Grantee to Complete**

Please list any Background Technology that will be used in the Project. The use of commonly-available, off-the-shelf products (such as Microsoft Excel, Adobe, etc.) need not be disclosed. [Note: Background Technology previously funded by the foundation will be considered a Funded Development for purposes of Global Access and any [license to the foundation](#).] Add more rows, as needed.

“Background Technology” means any and all products, services, processes, technologies, materials, software, data, or other innovations, and intellectual property created by You or a third party prior to or outside of the Project used as part of the Project.

List each Background Technology to be used in the Project	Is this Background Technology owned, controlled, or developed by You or sublicensable by You?	Do You need permission/license from any third party to use this Background Technology to achieve Global Access?	If any permission/license is needed, please detail below and describe Your plan and timeline to obtain such permission/license or submit a copy of the agreement.	If this Background Technology is subject to IP rights, please identify and include any links to applications, filings, or registrations, as applicable.
a Summit Learning platform	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No		
c	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No		

**Advocacy and Lobbying - Grantee to Complete**

While the foundation funds a broad range of advocacy activities, US law prohibits foundation funds from being earmarked to support direct or grassroots lobbying communications. Describe how this Project will be conducted in compliance with these rules, as summarized in the [Advocacy Guidelines Handout](#), and any other relevant local, state, or non-US lobbying laws. If foundation grant funds will be earmarked to influence policies, budgets, innovations, frameworks, action plans, etc., that could require a legislative vote, explain how such “legislative” activities will be conducted in accordance with the applicable rules and exceptions. Your explanation should address both direct and grassroots communications. If this investment does not include advocacy activities, indicate in the space below.

N/A



## SECTION D – PROJECT-SPECIFIC QUESTIONS

### Measurement and Evaluation - Grantee to Complete

Describe your plan for monitoring and evaluation of the outputs and outcomes identified in the narrative above. Specifically address:

1. The learning/evaluation questions for this investment and how You plan to answer them through monitoring and/or evaluation;
2. The resources (financial, technical, human) You need to ensure high quality monitoring and/or evaluation data; and
3. If You are planning a formal evaluation, describe when it will be conducted during the grant, who will conduct it (external/third party or not), the methodology You will consider, and how the main evaluation audiences will use the findings.

See the foundation's [evaluation policy](#) for reference.

#### ***Instructions to Complete:***

*Please do not edit the text in this section.*

Please see Measures and Data collection (Pilot Study Plan) for full details related to monitoring and evaluation.

### Data Access - Grantee to Complete

We anticipate this investment, if funded, would generate datasets that may be of interest to the foundation and/or to the field if made publicly available. Please describe any datasets that will be generated as part of this investment. Specifically address when and how the datasets would be made available to the foundation and/or to the public, in what form or format, and any anticipated costs to your organization. Additional information about Data Access can be found [here](#).

Datasets generated will be in pdf format. They will be made available on our school website <https://hu-ms2.org>

### Election-Related Activities - Grantee to Complete

Foundation funds may not be used to influence the outcome of any public election, in any country at the national, state, or local level. Please describe how foundation funds will be used to support advocacy activities that coincide with campaigns for elective office (e.g., voter education, polling or surveys, engagement with a candidate or parties), consistent with US and any additional local rules which may apply.

Not applicable

### Diversity, Equity & Inclusion - Grantee to Complete

How does your organization (staff, board, advisory groups, partners/etc.) represent the perspectives of those you are serving?

#### ***Instructions to Complete:***

**Please share any aspects or qualities your organization shares with the students and communities you serve (e.g., shared lived experience, shared place, shared identity).**

Our school was chartered by Howard University and resides on the campus of the university. 99% of our staff is African American, 1% Latino. More than 70% of our staff come from single parent homes, were the first their families to attend and complete college, were considered at-risk in their K12 academic careers. The educators at our school identify with the experiences of our children and this provides a unique quality to our instructional practices. Each of our children has a mentor on our staff who identifies with their experiences and is able to provide the social, emotional and academic supports that lead to success. Our staff fully understands the student perspective because they have had the same experiences themselves.

How do you plan to engage the communities in which you will test your solution during Phase 2? Please describe any activities you have in mind and how it will be beneficial to communities.

We surveyed Black girls from various communities in Washington DC regarding their experiences in mathematics class and asked them what real world applications they wanted to experience. Their responses included gentrification, anti-racism and social justice. Our solution will apply mathematics to these issues and create opportunities for our girls to express their concerns and suggest solutions to them. For example, many of our students are personally experiencing the effects of gentrification in their neighborhoods. In our solution, in the Algebra unit on Functions, our girls will apply mathematics to gentrification and develop a proposal for affordable housing to be presented to the DC City Council.

Within the context of this investment, what should we, the foundation, consider to better support equitable outcomes for the populations outlined above?

Black girls are frequently not supported in academic settings, especially in middle school. As adolescents, they experience social, emotional and physical changes that negatively affect their academic progress. The foundation should consider supporting programs that address the challenges that this demographic experiences, specifically programs that support the emotional growth, social development and academic success of Black girls. The foundation should consider supporting middle school teachers, who teach this demographic by providing them with training on how to engage girls in the content and to make schools and classrooms spaces where Black girls are affirmed and their learning encouraged.

## SECTION E – PROGRESS NARRATIVE

If this grant is approved and activated, complete this section for each progress report and submit to Your foundation Investment Owner and Investment Coordinator on the date indicated in Your grant agreement or latest amendment.

- Use this section to provide updates to Your foundation Investment Owner regarding progress made toward achieving Your Project’s stated outputs and outcomes.
- The Progress and Final Narratives must be submitted in Word, as PDFs will not be accepted.
- Please remember to update the Actual Completion Dates in the [Investment Results Chart at the end of Section A](#). If You’d like to edit any other information in this chart beyond the Actual Completion Dates, please consult with Your foundation Investment Owner.

For multiple narratives, copy and paste the below questions/fields (up to Section F - Final Narrative) for each narrative.

**DO NOT OVERWRITE EXISTING NARRATIVES.**

Scheduled Payment Amount  
(if applicable)

\$

Reporting Due Date

Reporting Period Start Date

Completed By

Reporting Period End Date

Proposal Completed/ Date  
Submitted

*By submitting this report, I declare that I am authorized to certify, on behalf of the grantee or vendor identified on page 1, that I have examined the following statements and related attachments, and that to the best of my knowledge, they are true, correct and complete. I hereby also confirm that the grantee or vendor identified on page 1 has complied with all of the terms and conditions of the Grant Agreement or Contract for Services, as applicable, including but not limited to the clauses contained therein regarding Use of Funds, Anti-Terrorism, Subgrants and Subcontracts, and Regulated Activities.*

### Progress Details

Provide information regarding the current period's progress toward achieving the investment outputs and outcomes as well as the work planned or anticipated for the next period. Please also remember to update the completion dates in the [Investment Results Chart at the end of Section A](#).

### Global Access Update

Are there any updates to Your responses to the Global Access/Impact for Foundation's Beneficiaries questions (a – d) in Section A?

No

Yes  (If yes, please explain below)

### Outputs/Funded Development and Background Technology Updates

Are there any new Outputs/Funded Developments to report which were not described in any documents previously submitted to the foundation?

No

Yes  (If yes, please explain below)

Are there any additional Background Technologies to report which were not described in any documents previously submitted to the foundation?

No

Yes  (If yes, please explain below)

### Project Adjustments

For each outcome or output that is behind schedule or under target, explain what adjustments You are making to get back on track.

### Feedback for the Foundation

Provide one to three ways the foundation has successfully enabled Your work so far. Provide one to three ways the foundation can improve.

### Roles and Responsibilities

Do You represent that the Project activities were conducted in compliance with all applicable ethical, legal, regulatory and safety requirements?

Yes

No  (If no, please explain below)

Are any new activities<sup>1</sup> planned which were not described in any documents previously submitted to the foundation?

No

Yes  (If yes, please explain below)

<sup>1</sup> In answering this question, please consider all new Project activities, such as those involving: confidential or protected information (including personally identifiable information or protected health information); the inclusion of children or vulnerable populations; research involving human subjects; clinical trials; post-approval studies; field trials; experimental medicine; provision of medical services (diagnostic, prophylactic or treatment); product development; use of genetically modified organisms, human tissue, animals, radioactive isotopes, pathogenic organisms, recombinant nucleic acids, select agents or toxins ([www.selectagents.gov](http://www.selectagents.gov)), dual-use technology ([http://export.gov/regulation/eg\\_main\\_018229.asp](http://export.gov/regulation/eg_main_018229.asp)), or any substance, organism, or material that is toxic or hazardous; use of aircraft, unmanned vehicle systems, drones or satellites; and the import, export, transfer, approvals, consents, records, data, specimens, images, and materials related to any of the foregoing.

### FINANCIAL UPDATE

*The purpose of this section is to help the foundation understand how programmatic performance affects actual and projected expenditures over the life of the investment.*

*Feel free to reach out to your foundation contact for support with these progress reporting requirements.*

*Note: Budget template and financial narrative instructions can be found [here](#). If you are using an older version of the budget template, this information could be in a different location in your template.*

### Latest Period Variance

**“Latest period variance” compares expenditures that occurred in the reporting period against the most recent forecast. See “Financial Summary & Reporting” sheet in the foundation budget template for calculated variance (for example, column AD, starting on row 29 for period 1). Note that the allowable variance is defined in your grant agreement.**

1. Did the project spend more-or-less than anticipated in comparison to the most recent forecast? Please explain the primary drivers and their causes of the overall variance for the latest period (for example – programmatic changes, delays in recruitment).
  
2. Please provide a detailed explanation for any expense category in which the variance was greater than 10%. This should include an explanation of programmatic decisions affecting expenditure amounts and/or how actual costs differed from prior assumptions.

**Future Period Projections**

“Future period projections” includes forecast by expense category and any additional dimensions for the future remaining reporting periods.

When populating your projections, please provide realistic projections that take into account the latest plan of expected activities and up-to-date associated costs. For example, projections usually will not simply carry forward previously unspent budget amounts into the next period or exactly match the original period budget. However, in total, the projections should match the total budget amount.

- I. Explain how your future projections for the remaining periods compare to your previous forecast. Consider how the project’s performance to date influences your forecast. In your response, please address the following:
- a. Any shifts (+/-10%) between expense categories, additional dimensions (if applicable), including the trade-offs and implications.
  - b. Have these shifts to forecast been discussed with your BMGF Program Officer? Was there a decision/approval?
  - c. Where your expected rate of spending has significantly increased/decreased, what is driving this difference?
  - d. What are the key assumptions behind the forecast (e.g. scale of activities, hiring delays, timeline changes)?
  - e. How have changes to your investment results framework affected your future period projections?

**Sub-Awards (if applicable)**

This sub-award section provides visibility to an often critical component of the grant spending where the budget template provides limited insight. The total of actual disbursements for this reporting period should equal the actual sub-award expenses reported on the “Financial Summary & Reporting” sheet in the budget template for this reporting period.

Use the table below to provide detail of all sub-grantee(s) or sub-contractor(s).

Organization Name	Actual Disbursement for this Reporting Period (U.S.\$)	Total Disbursed from Primary Awardee to Sub to Date (U.S.\$)	Total Sub-Awardee Spent to Date (U.S.\$)	Total Contracted Amount (U.S.\$)
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
<b>Total (ties to budget file(s))</b>	\$	\$	\$	\$

- I. For sub-awards greater than \$1M, please provide explanatory detail as requested in the latest and future period sections above.

Note: It is the foundation’s discretion to ask for updated sub-award budget files as part of the traditional progress report review process.

**Other Sources of Support (if applicable)**

Other Sources of Support include interest earned, current foreign exchange impacts, and co-funding (in-kind and other contributions).

- I. Explain any notable impacts from other sources of support.

**Financial Progress Summary Assessment**

**This section will help the foundation determine whether changes are needed to the payment schedule.**

Note: This assessment does not guarantee that the previously agreed to payment schedule will change.

1. Based on the financial progress update provided, summarize your assessment of remaining financial payment needs and current payment requested to support your work. Please consider the following in your response:

- Cash on hand as of the end of the reporting period as compared to the future period projection(s).
- Financial and programmatic performance, and any potential changes proposed to the forecast through the remaining periods.

Checklist - As you review your answers to questions in the financial update section, ensure that your report provides the following:

1. Explanation of how project expenditures differed from plan and the implications on programmatic progress to date.
2. Realistic future period projections based on updated plans, results tracker and future cost expectations.
3. Explanation of how future period projections differ from the original budget and previous forecasts, and the implications.
4. Explanation of other sources of support (funds) from other funders, interest earned or converting to non-USD currencies.
5. Explanation of future financial payment needs based on the project’s anticipated financial needs and cash on hand.

## SECTION F – FINAL NARRATIVE

If this grant is approved and activated, complete this section at grant’s end and submit to Your foundation Investment Owner and Investment Coordinator on the date indicated in Your grant agreement or latest amendment.

- Use this form to provide Your final update to Your foundation Investment Owner regarding the results achieved for the entire project.
- In addition, please provide Your perspective on key lessons learned or takeaways and input on the foundation’s support of Your work to ensure that we can capture and share learnings as appropriate both internally and externally.
- The Final Narrative must be submitted in Word, as PDFs will not be accepted.

Reporting Period Start Date	<input type="text"/>	Reporting Due Date	<input type="text"/>
Reporting Period End Date	<input type="text"/>	Remaining Funds (If applicable)	\$ <input type="text"/>
Proposal Completed/ Date Submitted	<input type="text"/>		

*By submitting this report, I declare that I am authorized to certify, on behalf of the grantee or vendor identified on page 1, that I have examined the following statements and related attachments, and that to the best of my knowledge, they are true, correct and complete. I hereby also confirm that the grantee or vendor identified on page 1 has complied with all of the terms and conditions of the Grant Agreement or Contract for Services, as applicable, including but not limited to the clauses contained therein regarding Use of Funds, Anti-Terrorism, Subgrants and Subcontracts, and Regulated Activities.*

### Final Progress Details

Provide information regarding the entire investment's progress towards achieving the investment outputs and outcomes. In addition, submit the [Investment Results tables](#) with actual results as requested. If You’d like to edit any other information in this chart beyond the completion dates, please consult with Your foundation Investment Owner.

### Global Access

**Do You confirm that You have ensured and will continue to ensure Global Access for the Funded Developments of the Project and, as applicable, Background Technology?**

Yes



No \_\_\_\_ (If no, please explain below)

### Outputs/Funded Developments and Background Technology

As part of Your Final Progress Report You must update your Outputs/Funded Developments disclosure and Background Technology disclosure. Do You confirm that You have provided a full and accurate disclosure of all Outputs/Funded Developments and Background Technology as applicable to the Project?

Yes \_\_\_\_

No \_\_\_\_ (If no, please explain below)

### Lessons Learned

Describe the top one to three takeaways or lessons learned from this Project. If You were to do this Project again, how would You approach it differently, if at all?

### Feedback for the Foundation

Provide one to three ways the foundation successfully enabled your work during this Project. Provide one to three ways the foundation can improve.

### Subgrants

If Your grant agreement (not applicable to contracts) is subject to expenditure responsibility and permits You to make subgrants to organizations that are not U.S. public charities or government agencies/instrumentalities, please complete the [Subgrantee Checklist](#) and attach a copy with this progress narrative for each such subgrantee.

### FINANCIAL UPDATE

*The purpose of this section is to help the foundation understand how programmatic performance affects actual and projected expenditures over the life of the investment.*

*Feel free to reach out to your foundation contact for support with these progress reporting requirements.*

*Note: Budget template and financial narrative instructions can be found [here](#). If you are using an older version of the budget template, this information could be in a different location in your template.*

### Latest Period Variance

“Latest period variance” compares expenditures that occurred in the reporting period against the most recent forecast. See “Financial Summary & Reporting” sheet in the foundation budget template for calculated variance (for example, column AD, starting on row 29 for period 1). Note that the allowable variance is defined in your grant agreement.

1. Did the project spend more-or-less than anticipated in comparison to the most recent forecast? Please explain the primary drivers and their causes of the overall variance for the latest period (for example – programmatic changes, delays in recruitment).
2. Please provide a detailed explanation for any expense category in which the variance was greater than 10%. This should include an explanation of programmatic decisions affecting expenditure amounts and/or how actual costs differed from prior assumptions.

### Sub-Awards (if applicable)

This sub-award section provides visibility to an often critical component of the grant spending where the budget template provides limited insight. The total of actual disbursements for this reporting period should equal the actual sub-award expenses reported on the “Financial Summary & Reporting” sheet in the budget template for this reporting period.

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	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
<b>Total (ties to budget file(s))</b>	\$	\$	\$	\$

1. For sub-awards greater than \$1M, please provide explanatory detail as requested in the latest and future period sections above.

Note: It is the foundation’s discretion to ask for updated sub-award budget files as part of the traditional progress report review process.

### Other Sources of Support (if applicable)

Other Sources of Support include interest earned, current foreign exchange impacts, and co-funding (in-kind and other contributions).

1. Explain any notable impacts from other sources of support.

Checklist - As you review your answers to questions in the financial update section, ensure that your report provides the following:

1. Explanation of how project expenditures differed from plan and the implications on programmatic progress to date.
2. Realistic future period projections based on updated plans, results tracker and future cost expectations.
3. Explanation of how future period projections differ from the original budget and previous forecasts, and the implications.
4. Explanation of other sources of support (funds) from other funders, interest earned or converting to non-USD currencies.
5. Explanation of future financial payment needs based on the project’s anticipated financial needs and cash on hand.

### Privacy and Non-Confidentiality Notice

The foundation is required by the IRS to publish a list of its grants. We may also provide a general description of our grants and contracts on our web sites, in press releases, and in other marketing materials. Subject to the foundation’s [Privacy Policy](#), the foundation may also share information

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