



REQUEST FOR PROPOSALS
Text Message System for a Study of Text Ed

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SECTION 1. SUMMARY

1.1. Overview

MDRC invites technology partners to submit proposals for a text messaging platform that will be used to send customized text messages as part of a large-scale, randomized controlled trial evaluation sponsored by the U.S. Department of Education's Institute of Education Sciences and Office of Postsecondary Education. The evaluation will provide rigorous evidence of the effectiveness of the messaging in increasing postsecondary enrollment and completion of the Free Application for Federal Student Aid (FAFSA) among adults who receive services from Educational Opportunity Centers (EOCs). The evaluation is being conducted by MDRC, a non-profit social policy research firm, and Dr. Lindsay Page of the University of Pittsburgh (referred to as the study team), under U. S. Department of Education contract ED-IES-16-C-0016.

For more information, see the Text Ed website: <https://www.textedproject.com/>.

1.2. Background

EOCs are funded by grants provided through the U.S. Department of Education. They provide informational services to adults who seek to enroll in or continue to pursue postsecondary education. The majority of EOC participants are from low-income backgrounds and are potential first-generation college-goers.

EOCs are often housed in 2- or 4-year colleges, but sometimes operate as independent community-based organizations. EOCs serve large numbers of participants (a minimum of 1,000 per year) who are often spread across wide geographic areas. EOC staff often have caseloads of several hundred participants, and it is typical for a participant to have just one or two meetings with a staff member, with little follow-up. Participants come in throughout the year; many seek support just a few weeks before they'd like to enroll in college, and others come in several months before. This demonstration's text-messaging strategy is intended to standardize and streamline the follow-up communication and support that happens after the participant's first meeting with EOC staff, in order to improve support to and outcomes for EOC participants.

The study focuses on EOC participants who have a high school diploma or GED and seek to enroll in postsecondary education. Up to 20 EOCs will participate in the study, with an expected total of at least 6,000 participants (half of whom will receive text messages) across sites. Participants enrolled in the study will be randomly assigned to either the *Text Group* or the *Standard Group*. The Text Group will be sent text messages that incorporate insights from behavioral science to support them in completing the FAFSA and enrolling in college, as well as the EOCs' "business as usual" services and support. The Standard Group will receive the EOC's "business as usual" services and supports. Because EOCs that currently use text messaging as a primary mode of communication will be excluded from the study, we expect that the Standard Group individuals will receive little to no outreach from their EOC via text.

1.2.1. The Demonstration

Text Ed is a text messaging intervention designed to help EOC participants more successfully navigate the college enrollment process, and to help EOC staff communicate more easily and efficiently with participants.

The messaging approach draws on recent rigorous research in two important areas. First, studies indicate that behavioral messaging can increase postsecondary enrollment among individuals who intend to transition to college directly from high school.¹ However, whether this will work for older, nontraditionally aged college-goers remains an open question. Second, a growing body of research shows that well-crafted behavioral messaging strategies can improve outcomes for low-income adults. For example, behavioral interventions have been shown to increase on-time child care subsidy renewal² and produce greater engagement in welfare-to-work programs.³ Together, these two areas of research suggest that behavioral interventions designed to increase postsecondary enrollment among low-income adults could be effective.

The text messaging will be designed to fit the context of EOCs and the participants they serve:

- **Messages will be salient and personalized to the target population and grounded in both context and behavioral research.** Messages are informed by behavioral science and consider (1) the implications of being a first-generation and/or low-income college participant; (2) diverse barriers to college access; and (3) the organizational context of EOCs.
- **Messages will both target specific steps in the college-going process and provide participants with general outreach and support.** Prospective college students must navigate many steps before enrolling in college. Low-income adults in particular may need targeted advice, guidance to resources, and support.
- **The messaging strategy will allow participants to begin to receive the messages at any time during the study and at any stage in the college application and enrollment process.** This differs from many interventions in which participants begin receiving messages at the same time and receive messages over the same duration and timetable.

¹ Castleman, B. L., & Page, L. C. (2015). Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates? *Journal of Economic Behavior and Organization*, 115, 144-160.

² Mayer, A., Calmeyer, E., Cullinan, D., & Patterson, K. (2015). Engaging providers and clients: Using behavioral economics to increase on-time child care subsidy renewals. Washington, DC: Office of Policy Research, Administration for Children and Families, U.S. Department of Health and Human Services.

³ Farrell, M., Smith, J., Reardon, L., & Obara, E. (2016). Framing the message: Using behavioral economics to engage TANF recipients. OPRE Report 2016-02. Washington, DC: Office of Planning, Research and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

The period over which a participant receives messages and the number of messages a participant receives will depend upon when the participant enrolls at the EOC and his/her intended date of enrollment in a postsecondary institution. EOC participants will enter the study on a rolling basis, and the exact messages that they receive will depend upon their progress with key college-going steps (e.g., FAFSA completion and college application) and specific life circumstances (e.g., if they have children and are in need of childcare services).

Up to twenty EOCs will be selected to participate in the study, and the goal is to have at least 3,000 participants receive text outreach from February 2018 through October 2020.⁴

1.3. Organization of this Request for Proposals (RFP)

The remainder of this RFP is organized as follows:

- **Section 2** outlines the technical requirements of the platform, services requested, and tasks that are required. It also describes the required and preferred technology partner specifications.
- **Section 3** provides instructions to Offerors on how to complete the RFP. The section includes proposal content and delivery instructions and post-RFP submission activities, as well as other relevant items needed to respond to this RFP.
- **Section 4** describes the criteria that will be used to evaluate the proposals submitted under this RFP, and describes the process that will be used to make an award determination.
- **Appendix A** describes varying message delivery schedules, outlines sample messages, and provides a sample of data fields that Offerors are asked to use to customize messages.
- **Appendix B** includes a check-list of qualifications to be filled out by Offerors.
- **Appendix C** includes a past performance questionnaire to be completed by references for the Offeror.
- **Appendix D:** includes the list of Federal Flowdowns from the MDRC contract with ED.

SECTION 2. TECHNICAL SPECIFICATIONS

2.1. Objective

The primary objective of this RFP is to solicit a technology partner whose platform and services will program, host, and automatically transmit customized text messages to Text Ed study participants. In addition, the technology partner will provide a web-based platform through which EOC staff can receive

⁴ The actual number of participants receiving the messages may exceed 3,000, depending on the number of participants who enroll at each EOC during this timeframe.

incoming text messages from participants, engage with participants in back-and-forth text-based communication, and track overall rates of engagement and other system performance metrics through a system dashboard. The automated text message outreach will encourage participants to complete key steps in the college-going process, troubleshoot challenges brought on by life circumstances, and support them in overcoming other social and/or psychological barriers that they may face in achieving college enrollment. Examples of messages are included in Appendix A.

The technology partner will be responsible for:

- Providing a secure software platform, visible to both MDRC and EOC staff, from which EOC staff are able to send and receive text messages to / from EOC participants, and that summarizes in a system dashboard overall rates of engagement and participant outcome metrics, including the number and frequency of outgoing and incoming messages, over time;
- Programming the customization of text messages into the platform using data that is specific to EOCs and to participants;
- Programming personalized text messages and a personalized schedule for sending such messages based on data supplied by MDRC, EOC staff, and participants (e.g., populating certain fields in messages, including participant name and name of the participant's intended institution);
- Providing training to MDRC and EOC staff on the use of the platform;
- Maintaining the platform and providing ongoing support;
- Setting up new participants in the system on a rolling basis; and
- Providing a channel, either via transmission or direct download, for MDRC to obtain complete system interaction data, including individual message level data, for the purpose of analysis.

To conduct this work, MDRC seeks a text messaging platform and service that has the ability to:

- Host a database of participant-level data (e.g., name, FAFSA completion status, college enrollment status, etc.), EOC-level data, and comprehensive system interaction data (e.g., number of messages sent out by the system, number of messages pending participant or EOC staff responses). This database should contain the underlying data for the messaging system and be able to store new information provided by MDRC staff (via data file uploads and web interface), EOC staff (via web interface), and participants (via text message responses) on a rolling basis;
- Use natural language processing to flexibly recognize key words or phrases that participants are prompted to reply with in order to (1) have the system automatically send pre-programmed responses to "yes/no" text message prompts, and (2) provide MDRC and EOC staff with participant status updates received as "yes/no" answers to questions relating to college-going milestones (e.g., completing the FAFSA) that will trigger updates to individual-level data on the system database;
- Process clear and unambiguous "Yes"/"No" responses from participants to text messages sent by the system into the database: these responses from participants will need to be used to update participant data in the system database, and the system will need to use the updated

data to automatically adjust message content and delivery timing as appropriate. Text message responses that are more ambiguous (e.g., “Yes, but I have a question...”) will be flagged by the system and forwarded to MDRC staff and the appropriate EOC staff member for review. In such instances, the system will not automatically make changes to the database, but will instead prompt EOC staff to make any needed changes manually. Export, either via transmission or direct download, raw and complete system interaction and individual message level data;

- Program personalized message content and personalized schedules for sending messages based on data stored in the underlying database (e.g., so that messages indicate the specific tasks and deadlines of the colleges participants plan to attend). The system will be capable of programming different and personalized message delivery schedules for participants on a rolling basis throughout the duration of the study;
- Update the content and delivery schedule of messages participants are programmed to receive based on participant-level changes made to the database (e.g., cancel messages about college application if EOC staff determine the participant has already applied, or if a participant texts back a Yes/No-type response to a question about status, and update information on the database accordingly);
- Update the content and delivery schedule of messages participants are programmed to receive based on EOC site-specific event schedules
- Summarize aggregate system interaction data as well as participant-level data on a web-based system dashboard. This dashboard should aggregate and display only data appropriate to each system user account;
- Allow for secure subaccounts so that EOC staff will have secure access to only the participants within their purview;
- Identify and report messages that require a response from EOC staff directly to participants through the system dashboard;
- Store, group, and display participant-level data and conversation history through a user-friendly and web-based inbox that facilitates two-way text message exchanges between individual participants and EOC staff ;
- Identify and report participant phone numbers unable to receive text messages through the system dashboard;

The system must be functional by November 1, 2017 for pilot testing and fully functional by February 1, 2018, which is when the first messages are scheduled to be sent to the first wave of participants.

2.2. Statement of Work (SOW)

2.2.1. Scope of Work

The technology partner will engage in the tasks described below.

Task 1: Setup and testing of text messaging platform for customized messages

The technology partner will provide a platform that will support two-way text messaging between individual EOC participants and EOC staff. The text messages will remind participants about tasks related to enrolling in college, applying for financial aid, and planning for various life circumstances that may influence their ability to enroll and succeed in higher education. The messages will be customized based on participant characteristics and information related to the colleges in which participants intend to enroll, as well as specific events and resources provided at each EOC. The timing and frequency of the messages will also be customized based on participants' target post-secondary enrollment date. Event schedules of individual EOCs will dictate the timing of event-related messages, and information on such events will become available on a rolling basis.

A unique feature of the Text Ed intervention is that it must be flexible to EOC participants entering the study over time and, therefore, to EOC participants receiving a different number of messages at a different rate of frequency. The schedule rules for transmitting the messages to groups of participants and the content of the messages will be provided by MDRC. The technology partner will pre-program messages in such a way that they can draw on participant- and EOC-level information provided by MDRC and EOC staff in the form of data file uploads or individual data point inputs, and participants themselves in the form of text message responses.

The technology partner will design, implement, and test a messaging system that will process new and updating information that will dictate message timing and customized content. Message content and delivery scheduling rules will be provided by MDRC. The messaging system should be flexible enough to manage a continuous inflow of new data throughout the study period. New data should be processed in the system within 24 hours of being uploaded.

In November 2017, the technology partner will work with MDRC to pilot test a small scale version of the messaging system with members of the study team. The system should be ready to demonstrate its ability to send Text Ed's customized messages on varying delivery schedules and change customization as new data is incorporated.

Because the structure of each EOC differs, a flexible account structure is required. In addition to MDRC, which will serve as the overall administrator, subaccounts that are restricted to subgroups of EOC staff will be needed, as well as individual subaccounts for EOC staff. That is, the system should allow for the following three types of accounts: (1) super admin account (1 - MDRC staff); (2) EOC site accounts (20 – one for each EOC); and (3) individual user accounts (~ 60 – one for each EOC staff member, averaging 3 per EOC site). The ability to craft and send messages to multiple participants at once will be reserved for the MDRC administrator account. The platform should allow messages to be sent to subsets of participants defined by shared characteristics such as zip code or county, EOC affiliation, and FAFSA

completion status. All other user subaccounts should have access to send messages to individual recipients only.

Task 2: User training

The technology partner will train MDRC and EOC staff on how to use the texting platform. The EOC staff training will be a component of a series of webinars that the MDRC study team will use to provide training to participating staff on the study overall. The technology partner will provide PowerPoint slides to facilitate the webinar training in addition to a system usage guide.

The technology partner will also provide technical support, as needed, to EOC and MDRC staff throughout the period of performance.

Task 3: Implementation and ongoing monitoring, adaptation, and support

MDRC will provide most of the message templates by August 31, 2017. Additional messages may need to be added afterwards, including during the intervention period. The technology partner will use data provided by MDRC, EOC staff, and participants to populate specified fields in scripted text messages provided by MDRC. Because not all the necessary data will be available at the same time, data updates and additions will be provided by MDRC, EOC staff, and participants throughout the study period to be incorporated in specified fields in the text messages. Data updates will be provided in the form of file uploads, direct data inputs via the system dashboard, and participant text message responses.

The system should be capable of incorporating newly added data to alter the topics a given participant receives messages about, the content within those messages, and the timing of message delivery.

EOC participants will enter the study and begin receiving text messages on a rolling basis beginning in February 2018. The final set of EOC participants are expected to enter the study and begin receiving messages in April 2020. Each participant will have his/her own individualized timetable of messaging. MDRC will provide an algorithmic framework that will use participant information provided by MDRC, EOC staff, and participants themselves to guide the assignment of delivery schedules and message content to individual participants. A total of 20 EOCs and at least 3,000 participants will be involved.

The vendor will monitor the platform regularly and will be responsible for troubleshooting as needed from February 2018 through October 2020.

Task 4: Tracking and exporting use analytics and data

Throughout the implementation period, the technology partner will collect usage data in real time. The key data of interest include:

- Content, date, and time stamp of the pre-programmed messages sent by the platform to participants;
- Content, date, and time stamp of participants' responses to those messages, including those who decline to participate (i.e. opt-outs);

- Click rates of hyperlinks embedded in messages;
- Content, date, and time stamp of EOC staff responses to participants’ messages;
- Records of when EOC staff log into and engage with the platform;
- Indicator of whether each message to a participant was received by an active cell phone number or not.

During implementation, MDRC and EOC staff should be able to view aggregate updates of the usage data collected via the system dashboard. In addition, at five points in time (see Exhibit 1), the technology partner will deliver secure data files on complete system interaction data collected, including all key data outlined above. MDRC will work with the technology partner to receive metadata on the messages that were sent by each site and the responses that they received from participants. MDRC will work with the technology partner to ensure that all messaging data provided contains the study research ID in order to merge the message data with other research data collected for this study.

Task 5: Project Management

The technology partner will participate in a kick-off call within 14 days of award of subcontract (anticipated award August 2017). The technology partner will subsequently participate in regularly scheduled calls scheduled by the study team to discuss progress on the tasks noted above.

The technology partner will submit progress reports with payment requests, based on a payment point schedule that reflects the Milestones and Deliverables outlined below in Exhibit 1. In the progress reports, the technology partner will summarize the major activities and accomplishments for the reporting period. In addition, the technology partner will provide information for each project task regarding challenges encountered and plans for addressing those challenges. The reports will also specify the extent to which the work is on schedule, briefly describe the upcoming activities, and identify and discuss significant deviations from the work or staffing as planned.

2.2.2. Period of Performance and Deliverable schedule

The anticipated period of performance of this subcontract is approximately 38 months, from August 2017 to October 2020. The anticipated schedule for required task and deliverables is as follows:

Exhibit 1: Milestones & Deliverable Schedule

Task	Milestone/Deliverable	Deadline
1	<i>Setup and testing of text messaging platform for customized messages - System ready for pilot testing</i>	November 1, 2017
2	<i>User training - Final webinar, system usage guide, and other training materials submitted to MDRC</i>	November 30, 2017
2	<i>Delivery of training to EOC staff</i>	January 2018
3	<i>Implementation and ongoing monitoring, adaptation, and support</i>	Ongoing from February 2018 through Summer 2020

4	Secure submission of data to MDRC	April 2018 July 2018 October 2018 October 2019 October 2020
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2.3. Technology partner Qualifications

There are multiple required capabilities each offeror must demonstrate to be eligible, as well as additional preferred capabilities. These capabilities are listed in Exhibit 3 and described in the remainder of this section.

Exhibit 3. Technology partner Qualifications

Dimension	Capability	Required	Preferred
Data management	1 Securely store and manage participant data	X	
	2 Import relational data files	X	
	3 Export raw and complete interaction data	X	
	4 Automatically collect data on participant engagement, including number of text messages sent to participants, links clicked, replies received (and from whom), opt-out rates, and EOC staff engagement with platform	X	
	5 Display system interaction and aggregate participant-level data on a system dashboard	X	
	6 Structure account access to include one central administrative user, 20 EOC subaccounts, and EOC staff user accounts, all with differing capabilities	X	
	7 Flag unanswered participant text response messages	X	
	8 Regularly assess and report to MDRC on whether cell phone numbers remain active for EOC participants	X	
	9 Ability to use alternate contact information to contact participants with inactive cell phone numbers		X
	10 Ability to communicate with other data management systems		X
Customization	1 Automatically personalize message topics and content based on participant characteristics and other information provided by MDRC, EOC staff, and participants	X	
	2 Use natural language processing to flexibly recognize key words or phrases that participants are prompted to reply with in order to receive subsequent messages	X	
	3 Send messages from phone numbers using an area code local to each EOC	X	
	4 Allow administrative user account to create and send	X	

Dimension	Capability	Required	Preferred
	batch text messages to selected sets of participants		
	5 Embed active and shortened hyperlinks to additional multimedia content in large-scale scheduled message batches	X	
	6 Set and implement a personalized schedule of message distribution for each participant	X	
User experience	1 Provide users with training on the platform	X	
	2 Provide an easy but secure log-in system for MDRC and EOC staff	X	
	3 Maintain the platform and provide ongoing support as needed	X	
	4 Ensure that the online platform is fully functional on all major internet browsers	X	
	5 Offer a mobile version of platform interface		X
	6 Enable EOC staff to receive notifications about incoming participant messages on existing email accounts		X
Participant experience	1 Enable two-way interaction so participants can respond with text messages directly to their EOC advisor’s subaccount	X	
	2 Send large batch messages but avoid having batch-distributed messages caught in spam filters	X	
	3 Enable the use of EOC logos as contact images seen by participants		X
Technology partner experience	1 Experience working with participants similar to the EOC target population		X
	2 Experience working on education-related projects of a similar size and scope		X

2.3.1. Required Capabilities

Detailed descriptions of Required Capabilities follow.

Data Management

- Securely store and manage participant data.** The participant-level data must be stored securely and transferred through password-protected sites. Moreover, EOC staff must be able to view aggregate data on the system dashboard only for participants within their purviews. The technology partner should collect and manage incoming data on a rolling basis as participants will be enrolled in the study on a rolling basis. The technology partner should conduct this work according to the requirements of the Federal Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g and 34 CFR Part 99 and all other applicable State and Federal laws, rules, and regulations. The technology partner will employ reasonable measures to keep all participant information confidential in compliance with all applicable laws, including, without limitation,

FERPA. The participant information will be disclosed only to technology partner staff members involved with the project.-

- **Import relational data files.** MDRC and EOC staff will provide the technology partner with participant-level and institution-level data on a rolling basis beginning in February 2018. The participant-level data will include, but would not be limited to, a participant's name, cell phone number, location, EOC affiliation, assigned EOC advisor, colleges that the participant plans to attend, desired date of enrollment, college application completion status, status of childcare and transportation needs, and financial aid completion status. Institution-level data will include college names, deadlines, activities, requirements, websites, EOC-specific events, EOC location-specific childcare resources and other information for the EOCs and the colleges that the participants plan to attend. The platform would need to be able to link the participant-level data to the institutional-level data using participant identifiers and institution identifiers and begin sending scheduled messages to participants within 24 hours (1 business day) of MDRC or EOC staff providing new participant data to the partner. Proposals with a 24-hour turnaround will be given preference, but others will be considered.
- **Export raw and complete interaction data.** The platform must be able to export all collected participant-level data and system interaction data from participants across the various EOC sites for downloading and analysis by MDRC staff. Standard data backups and archiving practices should ensure that data recovery is possible in the event that data is lost, corrupted, or destroyed.
- **Automatically collect data on participant engagement, including number of text messages sent to participants, links clicked, replies received (and from whom), opt-out rates, and EOC staff engagement with platform.** The platform must be capable of automatically collecting participant-level data on the messages participants send and receive. These data include the content and time stamps of the text messages participants receive, the content and time stamps of the text messages participants send, any hyperlinks embedded within the text messages that participants click on, and other ways in which participants engage with the text messages. The data collection must include activity related to both text messages sent by MDRC as well as text messages sent by EOC staff.
- **Display system interaction and aggregate participant-level data on a system dashboard.** Participant engagement data (described above) should be displayed, in the aggregate, on the online platform viewable by MDRC and EOC staff users. The data aggregated and displayed on said dashboard should differ by user account and only contain data from participants in each user's purview. This dashboard should also include aggregate information on participant progress in the college-going process. It is strongly preferred that analytics on this dashboard be available in real time and that the system has the capacity to tabulate by participant subgroups as defined by EOC site affiliation or time periods, rather than only available for batch download at the conclusion of the text messaging demonstration.

- Structure account access to include one central administrative user, 20 EOC subaccounts, and EOC staff user accounts, all with differing capabilities. MDRC will serve as the central administrative user (the “super” administrative user) and will have the ability to send a set of core pre-scheduled text messages to participants across different EOC sites simultaneously; EOC staff will be the subaccount users and will have the ability to send response messages and follow up directly with their own participants. Each EOC staff associated with the account will have secure access to only the participants within their purview. The platform should be able to accommodate multiple subaccounts for each participating EOC site.
- **Flag unanswered participant text response messages.** The system should create clear and timely alerts of messages received from participants that require a response from EOC staff but have gone unanswered for a given duration. MDRC will provide guidelines as to how long the system should wait for a response before generating an alert.
- **Regularly assess and report to MDRC on whether cell phone numbers remain active for EOC participants.** The system should identify and track unresponsive participant phone numbers, and generate notifications for EOC and MDRC staff on affected numbers.

Customization

- **Automatically personalize message topics and content based on participant characteristics and other information provided by MDRC, EOC staff, and participants.** Many of the text messages are designed to be customized based on information that is specific to an individual participant, including, but not limited to, a participant’s name, cell phone number, location, EOC affiliation, assigned EOC advisor, colleges that the participant plans to attend, desired date of enrollment, college application completion status, status of childcare and transportation needs, and financial aid completion status. The platform will need to be able to use all imported data to auto-populate fields within text messages—for example, to fill in the fields in this message with information relevant to a specific participant: “Hi [Participant Name], this is [EOC ADVISOR] from [EOC SITE]. We want to help you w/ college! Stay tuned for several texts w/ key college To Dos.”
- **Use natural language processing to flexibly recognize key words or phrases that participants are prompted to reply with in order to receive subsequent messages.** For example, if a message says, “Are you going to college this fall? Reply YES or NO,” the system should recognize “Yes!” “Yes I am,” and “Yeah” as synonyms for “Yes.” In addition, the technology partner must be able to interpret and respond to a set of standard commands from participants that do not necessarily relate to specific pre-programmed text messages. For instance, the platform should be able to automatically process and react to text messages like “STOP” or “CANCEL” should a participant decide he or she no longer wishes to receive text messages. The technology partner will automatically process clear and unambiguous “Yes”/“No” responses from participants to text messages sent by the system into the database. Text message responses that are more ambiguous (e.g., “Yes, but I have a question...”) will be flagged by the system and forwarded to MDRC staff and the appropriate EOC staff member for review. In such instances, the system will

not automatically make changes to the database, but will instead prompt EOC staff to make any necessary changes manually.

- **Send messages from phone numbers using an area code local to each EOC.** The platform should allow the phone number that participants receive text messages from to have an area code specific to the EOC site's location.
- **Allow administrative user account to create and send batch text messages to selected sets of participants.** The platform should allow MDRC staff user accounts to create custom messages and message templates to be populated with MDRC- or EOC-provided data. These messages should be easy to send out to multiple participants at once. MDRC staff should be able to create message recipient groups by EOC site affiliation and other participant characteristic data. For example, the platform should also allow messages to be sent to subsets of participants defined by shared characteristics such as zip code, EOC affiliation, and FAFSA completion status. The platform should allow MDRC staff to pre-program these messages and to schedule them for distribution at a later date.
- **Embed active and shortened hyperlinks to additional multimedia content in large-scale scheduled message batches.** Some text messages include hyperlinks to websites that feature informational content for participants, such as a website about on-campus participant services. Rather than requiring participants to copy and paste URLs from the text messages into web browsers, the platform should have the ability to embed active hyperlinks within the text messages so that participants can simply click on the hyperlinks and automatically be directed to the relevant content. Moreover, it is also preferable that these links be shortened URLs, or "tiny URLs," in case participants' mobile devices or plans limit the number of characters permitted per text.
- **Set and implement a personalized schedule of message distribution for each participant.** The platform should allow each individual participant to have a unique preset message delivery schedule and individualized message content. This message delivery schedule should be easily changeable as information about a participants' progress in the college going process becomes available that would warrant a change in message timing. The platform should automatically update the message content and delivery schedule that a specific participant is set to receive based on changes made to the system database either automatically by text message responses or by data updates provided by EOC or MDRC staff.

User experience

- **Provide users with training on the platform.** The technology partner must have demonstrated capability to train non-technical users on the platform functionality.
- **Provide an easy but secure log-in system for MDRC and EOC staff.**

- **Maintain the platform and provide ongoing support as needed.** The technology partner must provide regular maintenance and assistance in troubleshooting technical issues as they arise throughout the duration of the study. The technology partner will be expected to work primarily with MDRC staff on platform maintenance and ongoing technical support. The technology partner will also be expected to provide technical support directly to EOC staff for any questions or concerns that MDRC staff are not able to address.
- **Ensure that the online platform is fully functional on all major internet browsers.** The online platform should be viewable and functional on Internet Explorer, Google Chrome, Firefox, and Safari.

Participant experience

- **Enable two-way interaction so participants can respond with text messages directly to their EOC advisor's subaccount.** The platform should have the capability to automatically send pre-planned outgoing messages as well as allow participants to send messages back to EOC staff. Participants might respond to a text message with a one- or two-word response, or with follow-up questions about a particular element of the college enrollment or matriculation process. In some instances, the system will send additional follow up messages to participants according to their responses and pre-planned messages (with branching logic). In other cases, incoming messages will simply come to EOC staff in an inbox, and the system will allow EOC staff to craft and send individual messages in response to participant questions or comments. In other words, the platform should allow multiple exchanges to take place between EOC platform users and participants. EOC staff should have the ability to see a participant's full text message conversation history at any time, including messages sent automatically by the platform, on a web-based inbox that will be a part of the system.
- **Send large batch messages but avoid having batch-distributed messages caught in spam filters.**

2.3.2. Preferred Qualifications

Data Management

- **Ability to use alternate contact information to contact participants with inactive cell phone numbers.** The messaging system will ideally have the capability to use alternate contact information (email or a different number, for example; these would be provided by MDRC) to automatically send a message to participants with inactive cell phone numbers with the purpose of prompting the participant to share a new and active cell phone number. If such data were collected, the system would then update participant contact information on the system database and continue message delivery as scheduled.
- **Ability to communicate with other data management systems.** The platform will ideally have the capability to communicate with existing databases used by the EOCs, such as Blumen, to

reduce the burden on users of navigating and managing multiple applications. Optimally, this integration should give users the ability to send and receive real-time text messages through their primary student data management system. MDRC would prefer a technology partner with experience integrating their text message data with a variety of systems. The technology partner should also have experience working directly with local staff to support the integration setup.

User experience

- **Offer a mobile version of platform interface.** A platform interface that is optimized for viewing and use on mobile devices would best enable EOC staff to view and respond to student messages when they are not at their computers. The mobile interface should be user-friendly and could take the form of a mobile version of the platform website and/or a mobile application.
- **Enable EOC staff to receive notifications about incoming participant messages on existing email accounts.** The platform will ideally notify EOC staff of text messages received that require a direct and customized response by sending an email notification.

Participant experience

- **Enable the use of EOC logos as contact images seen by participants.** It would be ideal if EOCs were able to upload their logos onto the platform to be used at their contact image. Participants with smart phones would see this image linked to the number from which they receive Text Ed text messages.

Technology partner experience

- **Experience working with participants similar to the EOC target population.** EOC participants are typically low-income and would-be first-generation college students. Experience working with similar populations would enhance the technology partner's understanding of some of the academic and non-academic challenges faced by the students who would be served by the text messaging demonstration.
- **Experience working on education-related projects of a similar size and scope.** MDRC prefers a technology partner with experience in offering text messaging services for education-related purposes on a similar scale, and/or in working in institutions of higher education. This experience would make the technology partner more familiar with school or college environments and the types of interactions that typically take place among participants, EOC staff and other school/college staff, and other actors in those environments. Experiences with education-related projects could also provide technology partners with knowledge about platforms that work particularly well for school staff members, which would be valuable for this project given that EOC staff will be included as users on this project's platform account.

SECTION 3. INSTRUCTIONS TO OFFERORS

3.1. General

1. This evaluation is funded by the U.S. Department of Education under Contract No. ED-IES-16-C-0016 (the Prime Contract). The successful Offeror will be issued a subcontract by MDRC, which will be governed by the applicable Federal Acquisition Regulations (FAR) and the required terms and conditions of the Prime Contract. The terms and conditions of the Prime Contract are appended to this RFP. The contract will be structured as a fixed-price contract (with payments tied to deliverables/milestones). The study team will assess proposals for the best program quality and pricing combination.
2. All proposals will be submitted electronically and will clearly identify the name of the Offeror and the Request for Proposals (RFP) title *Text Message System for a Study of Text Ed*.
3. Late proposals will not be considered.

3.2. Proposal Validity Period

Proposals are to be valid for a minimum of sixty days (60) after the closing date of this RFP.

3.3. Preparation of Proposals

The format for preparation of the requested proposal is set forth below. All sections must be completed. Documentation must be in PDF and electronically signed by an individual authorized to commit the Offeror.

3.4. Proposal Content

3.4.1. Technical Approach

Offerors should prepare a **Technical Approach** of no more than 10 pages (1" margins, single-spaced, Times New Roman 11-point font for text). In the Technical Approach please include the following information:

- A description of the technical approach to fulfilling the Tasks described in the Statement of Work. Include the proposed organizational structure, functions, and responsibilities of the proposed project team.
- A description of how the capabilities of your platform align with the required and preferred qualifications described in Section 2. Include discussion of your organization's approach to quality control/testing of text message programs prior to fielding.
- Evidence of your platform's customization capabilities. Using screenshots or other means, show how your platform would customize the messages listed in Appendix A. These pages should be included as an appendix to the proposal and will not be included in the page count.

The page limits above apply to the Technical Approach only and do not include any of the additional materials that should be included in all proposals submitted (such as Budget and Budget

Narrative). Costs will be evaluated for congruence with the quality of the proposed work, as long as the total budget is within the recommended range for this scope of work.

3.4.2. Past Performance Questionnaire

Offerors should submit **at least one and no more than three** completed Past Performance Questionnaires (Appendix C) from former clients for work that best matches the scope requested in this RFP.

3.4.3. Budget & Budget Narrative

Offerors will prepare a Firm Fixed Price budget. Offerors will provide a budget narrative to accompany the Fixed Price budget. While preparing this budget, offerors should assume a minimum of 3,000 participants across 20 EOCs with an average of 3 EOC Staff user accounts per EOC. We estimate that an average of 80,000 text messages will be sent and received through the system. There is no page limit for the Budget Narrative.

The Bidder's Budget Narrative **must** include the following information:

- *General Business Information:* Organization's legal name and address; business point(s) of contact; TIN number, DUNS number (if applicable), and any applicable small or disadvantaged business status(es) as defined by the US Small Business Administration; certification of current SAMS/CCR registration⁵ (if applicable) and certification of cost pricing information as consistent with FAR.⁶
- *A statement of the Offeror's total proposed costs for performing the work described within this RFP.* The total costs should include all of the tasks and deliverables described. Offerors are asked to provide pricing for the following platform structure: One central administrative user and 20 EOC accounts with an average of 3 EOC staff accounts each.
- *Proposed costs itemized for each task listed under Section 2.2.1 of this RFP.* The proposed budget for each task should include the following:
 - a. *Direct Labor.* For all personnel, provide the title, salary, and amount of time in hours that each person will devote to the project by task. The rates to be supplied in the price proposal must not be loaded rates or average rates.
 - b. *Fringe Benefits.* Please provide estimated fringe benefit costs according to your most recent audited financial statements or Negotiated Indirect Cost Rate Agreement (NICRA). Include a copy of your most current NICRA. If you do not have a negotiated rate agreement, the rates proposed will need to be justified and negotiated.

⁵ SAMS/CCR refers to the System for Award Management/Central Contractor Registration. Please visit <http://www.sam.gov> for more information.

⁶ The FAR refers to the Federal Acquisition Regulations. Please visit <https://www.acquisition.gov/?q=browsefar> for more information.

- c. Other Direct Costs (ODCs). Indicate all significant direct costs not covered above. Examples are platform and equipment, SMS messages, materials and supplies, facilities, printing and postage, and communications. These costs must be broken down in sufficient detail to analyze by instance and unit.
 - d. Indirect Costs. Apply all applicable indirect costs according to your recovery practice. Please indicate whether you have an Indirect Cost Rate Agreement or NICRA approved by the federal government. If you do not have an Indirect Cost Rate Agreement approved by a federal agency, please provide audited balance sheets and profit and loss statements for the last two complete years, and the current year-to-date statements (or lesser period of time if your organization is newly formed).
 - e. Fee. Bidders wishing to include fee must indicate the total proposed percentage and provide a justification or rationale that is consistent with prior business practices.
- *Proposed payment points.* Bidders must provide a payment schedule based on the milestones and deliverables outlined in Section 2.2.2, Exhibit 1. Please specify the amount of each payment point for each deliverable or activity and please ensure payment amounts are reasonably spread out and commensurate with the work accomplished. Given the current schedule in Exhibit 1, we anticipate bidders will request at least 45% of the total budget in the first year and the remaining balance of the budget across the following two years.

MDRC reserves the right to request additional pricing information on all costs proposed and other documentation prior to issuing any award, such as a certificate of insurance, recent contract reference information, documentation of existing commitments, evidence of adequate business integrity, and personnel policies and procedures. Volume-discounts (e.g. per message or other criteria) are encouraged to increase the competitiveness of an Offeror's bid. Flow downs from the prime contract with the Department of Education are included as Appendix D to this RFP.

3.5. Expenses

Any costs incurred by the Offeror in preparing and providing a response to this RFP are solely the responsibility of the Offeror. In addition, should the Offeror be chosen to provide a demonstration of its software, the costs associated with that process will similarly be the sole responsibility of the Offeror.

3.6. Amendment of Request for Proposal

Any amendments to this RFP will be provided in writing.

3.7. Period of Performance

The anticipated period of performance of this subcontract is approximately 38 months, from August 2017 to October 2020. The schedule regarding key milestones and deliverable is provided in Subsection 2.2.2: Period of Performance and Timelines.

3.8. Submission of RFP Questions by Offerors

All questions pertaining to the contents of this RFP must be submitted in writing via email. Questions or requests for clarification must reference the RFP number and may be addressed to Amanda Grossman and sent by email to: TextEd@mdrc.org **no later than 3 PM Eastern Time on June 12, 2017.**

3.9. Submission of Proposals

Proposals must be submitted as a single PDF file in electronic form on or before **3 PM Eastern Time on June 26, 2017.** Please send proposals to Amanda Grossman at TextEd@mdrc.org.

3.10. Post Proposal Submission Activities

Upon receipt of the proposals, the Evaluation Committee will review and score all proposals. See Section 4 for details on the evaluation criteria and process.

3.10.1. Product Demonstrations

Finalists will be requested to provide a demonstration and to meet virtually with the Evaluation Committee. MDRC will schedule the meetings with selected finalists to view a demonstration of the message customization and user dashboard. A detailed list of items to be explicitly demonstrated during the meeting will be provided by MDRC. The meeting will provide an opportunity for the Offeror to demonstrate functions of its software, tools, and reporting functions and to clarify any questions to ensure thorough and mutual understanding of the product and services.

The meeting will be conducted using Cisco Webex or a similar product, or a combination thereof to include multiple personnel.

SECTION 4. SELECTION CRITERIA AND EVALUATION

This request for proposals is designed to provide MDRC with the ability to determine which respondent(s) best satisfies requirements in support of the Text Ed study. This section identifies the evaluation criteria and process that will be used in the selection process.

4.1. Evaluation Criteria

The successful Offeror (if any) will be determined based on the offer that best conforms to the solicitation requirements and is evaluated to be the most advantageous to MDRC (price and technical qualifications considered). Technical proposals that meet minimum requirements will be evaluated according to the following criteria:

- Platform Capability
- Relevant Experience
- Technical Approach

Each criterion will be weighted as indicated in Exhibit 4, for a total of 100 points.

Exhibit 4. Evaluation Criteria

Criteria	Description	Points
Platform capability	Proposals will be evaluated on the basis of evidence of having all of the required qualifications to provide the proposed activities at the scale required by the study.	70
Relevant experience	Proposals will be evaluated on the extent to which corporate qualifications and prior experience have adequate breadth and depth.	15
Technical approach	Proposals will be evaluated on the extent to which the technical approach demonstrates thoughtful and specific management and administrative arrangements, and the extent to which the proposed execution plan aligns with project objectives.	15

4.2. Evaluation Process

Proposals will undergo a three-stage review process. In the first stage, the study team will review proposals to ensure that they are complete and meet the stated requirements of this RFP with respect to budget and technical material. In the second stage, based on the criteria shown in Exhibit 4, the evaluation team will review all complete proposals and recommend up to three proposals for final consideration.

The third stage will consist of written responses to questions and a platform demonstration by the finalists, after which the review panel will make a final recommendation. The platform demonstration will entail selected offerors setting up an example text messaging program similar to the Text Ed message program. The demonstration will also involve a mock training on how to use the platform with the sample text messages and sample dataset provided by MDRC. The final selection of the technology partner will be made by the study team in consultation with the U.S. Department of Education.

Costs will be evaluated for congruence with the quality of the proposed work. Strong proposals must have a realistic budget for each of the tasks, with a detailed budget justification. The study team will assess proposals for the best program quality and pricing combination.

APPENDIX A: MESSAGE TIMING, SAMPLE MESSAGES, AND SAMPLE DATA

In this appendix, we provide details on the message delivery schedule variation as well as example text message content related to the FAFSA / financial aid application process.

Message Timing

A unique feature of the Text Ed intervention is that it must be flexible to EOC participants entering the study over time and, therefore, to EOC participants potentially receiving a different number of messages at a different rate of frequency. Most participants will receive the majority of messages prior to their intended date of matriculation. Each participant will then receive a small number of messages after the first day of classes. While we will not know each institution's census date (e.g., the date at which enrollment information is captured, for example, for reporting to the National Student Clearinghouse, which is usually after the add/drop period), the goal is to message participants approximately through this time point in order to encourage participant's successful start in college and increase the chances of positive impacts on timely enrollment, as measured through the NSC.

In this section, we lay out details regarding the maximum number of messages that a participant will receive between the time of the first message and postsecondary matriculation. In addition, we articulate the rate at which the participant would receive those messages, according to the length of time between study enrollment and intended college matriculation.

In the chart below, we lay out prototypical use cases, the associated duration of allowable pre-matriculation messaging and the associated number and frequency of messages sent. Note that all participants will receive additional text messages after their enrollment date.

Timeframe	Duration between first message and semester start in:			Message frequency	Total N messages received (up until enrollment date)
	Months	Weeks	Business Days		
Long	3 - 6	12 - 24	60 – 120	One message every: 3 - 6 days	20
Medium	2	8	40	3 days	14
Short	1.5	6	30	3 days	11
Very short	0.5	2	10	3 days	5

MDRC designed four versions of the Text Ed messaging intervention, differentiated by the allowable duration of messaging, pre-matriculation:

- **Long** (60 or more business days between first message and matriculation): these participants will receive a total of up to 20 messages at a frequency of one message approximately every three to six business days.

- **Medium** (40 to 59 business days between first message and matriculation): these participants will receive a total of up to 14 messages at a frequency of one message approximately every three to four business days.
- **Short** (30 to 39 business days between first message and matriculation): these participants will receive a total of up to 11 messages at a frequency of one message approximately every three to four business days.
- **Very short** (0 to 29 business days between first message and matriculation): these participants will receive a total of up to 5 messages at a frequency of one message approximately every three to five business days.

The technology partner will assign each participant to a very short, short, medium or long version intervention. For each participant whose information is provided to the technology partner, the technology partner will:

- Calculate the number of business days between the planned timing of the first, introductory message and the participant's planned date of matriculation;
- Assign each participant to one of the four intervention versions described above (e.g., very short, short, medium or long); and
- Calculate the rate with which the participant will receive messages prior to beginning postsecondary education by dividing the number of allowable pre-enrollment messaging days by the planned number of messages (e.g., 20 messages for the long intervention, 14 messages for the medium intervention, and 11 messages for the short intervention).

Sample Messages

In this sample message module, EOC participants will be organized into one of four categories based on their responses to questions regarding their FAFSA status. This information will be collected as participants enroll for the study and provided to the technology partner through data files supplied by MDRC. The technology partner will need the capability to filter EOC participants into relevant message flows accordingly. These messaging categories are:

- Group 1: Have not started FAFSA
- Group 2: Started but have not completed FAFSA
- Group 3: Completed FAFSA, have not received Student Aid Report (SAR)
- Group 4: Completed FAFSA, has received Student Air Report (SAR)

These messages rely on the following data elements for message personalization / customization, which the technology partner will need to be able to populate accurately for each individual recipient.

- Participant name
- EOC business hours
- EOC staff member name

The technology partner will calculate the frequency of message distribution for each participant based on the participant's target enrollment date and date of study enrollment, which together will establish each participant's individualized message timetable, as described above. We present draft message content below.

Group 1: Those who have not started FAFSA

Message	Content
1	<p>Part 1: (1/3) After applying to college, next up is FAFSA to apply for financial aid. You may qualify for up to \$5920/year in grant aid. That's \$\$ you don't pay back.</p> <p>Part 2: (2/3) First, take 30 minutes to get organized. Here's a list of what you will need: https://fafsa.ed.gov/help/before003.htm. Then get started at FAFSA.gov.</p> <p>Part 3: (3/3) Completing FAFSA can take time but we are here to help! You can come to our office [HOURS/DAYS] for help. Would you like to set up a time to meet? Yes/No</p>
2	<p>Part 1: Hi [PARTICIPANT NAME]-After filing FAFSA, you'll get your Student Aid Report (SAR). This confirms your FAFSA is complete. Received your SAR? Please reply YES or NO</p> <ul style="list-style-type: none"> • Response to Yes: Great news! Take 10 minutes to review your SAR and make sure all of the info is correct. • Response to No: No problem. Your SAR should come by email within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help. • No response from client [wait 1 day]: <p>Part 1: (1/2) Your SAR should come within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help.</p> <p>Part 2: (2/2) If you do have your SAR, take 10 minutes to review it and make sure all of the info is correct.</p>
3	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Once you have it, check your SAR to see if you are selected for income verification. If you are, your school needs more info to give you aid.</p> <p>Part 2: (2/2) If not, still take 5 minutes to call your college's financial aid office. Ask if they have what they need & when you will get your aid package if you don't have it already.</p>
4	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Just following up. The financial aid process can be challenging, and I wanted to check in and make sure you were all set.</p> <p>Part 2: (2/2) Did you have a chance to check in with your financial aid office? If you have any questions, just let me know. –[EOC STAFF MEMBER]</p>
	MOVE TO COLLEGE / FINANCIAL AID ACCEPTANCE MODULE

Group 2: Those who have started but not completed the FAFSA

Message	Content
1	<p>Part 1: (1/3) After applying to college, next up is FAFSA to apply for financial aid. You may qualify for up to \$5920/year in grant aid. That's \$\$ you don't pay back.</p> <p>Part 2: (2/3) First, take 30 minutes to get organized. Here's a list of what you will need: https://fafsa.ed.gov/help/before003.htm. Then finish at FAFSA.gov.</p> <p>Part 3: (3/3) Completing FAFSA can take time but we are here to help! You can come to our office [HOURS/DAYS] for help. Would you like to set up a time to meet? Yes/No</p>
2	<p>Part 1: Hi [PARTICIPANT NAME]-After filing FAFSA, you'll get your Student Aid Report (SAR). This confirms your FAFSA is complete. Received your SAR? Please reply YES or NO</p> <ul style="list-style-type: none"> • Response to Yes: Great news! Take 10 minutes to review your SAR and make sure all of the info is correct. • Response to No: No problem. Your SAR should come by email within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help. • No response from client [wait 1 day]: <p>Part 1: (1/2) Your SAR should come within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help.</p> <p>Part 2: (2/2) If you do have your SAR, take 10 minutes to review it and make sure all of the info is correct.</p>
3	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Once you have it, check your SAR to see if you are selected for income verification. If you are, your school needs more info to give you aid.</p> <p>Part 2: (2/2) If not, still take 5 minutes to call your college's financial aid office. Ask if they have what they need & when you will get your aid package if you don't have it already.</p>
4	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Just following up. The financial aid process can be challenging, and I wanted to check in and make sure you were all set.</p> <p>Part 2: (2/2) Did you have a chance to check in with your financial aid office? If you have any questions, just let me know. –[EOC STAFF MEMBER]</p>
	MOVE TO COLLEGE / FINANCIAL AID ACCEPTANCE MODULE

Group 3: Those who have completed FAFSA, have not received the SAR

Message	Content
<p>1</p>	<p>Part 1: Hi [PARTICIPANT NAME]-After filing FAFSA, you'll get your Student Aid Report (SAR). This confirms your FAFSA is complete. Received your SAR? Please reply YES or NO</p> <ul style="list-style-type: none"> • Response to Yes: Great news! Take 10 minutes to review your SAR and make sure all of the info is correct. • Response to No: No problem. Your SAR should come by email within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help. • No response from client [wait 1 day]: <p>Part 1: (1/2) Your SAR should come within 2 weeks of filing FAFSA. If you filed FAFSA but don't have your SAR, let me know and I can help.</p> <p>Part 2: (2/2) If you do have your SAR, take 10 minutes to review it and make sure all of the info is correct.</p>
<p>2</p>	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Once you have it, check your SAR to see if you are selected for income verification. If you are, your school needs more info to give you aid.</p> <p>Part 2: (2/2) If not, still take 5 minutes to call your college's financial aid office. Ask if they have what they need & when you will get your aid package if you don't have it already.</p>
<p>3</p>	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Just following up. The financial aid process can be challenging, and I wanted to check in and make sure you were all set.</p> <p>Part 2: (2/2) Did you have a chance to check in with your financial aid office? If you have any questions, just let me know. –[EOC STAFF MEMBER]</p>
	<p>MOVE TO COLLEGE / FINANCIAL AID ACCEPTANCE MODULE</p>

Group 4: Those who have completed FAFSA, have received the SAR

Message	Content
<p>1</p>	<p>Part 1: (1/3) Hi [PARTICIPANT NAME]-After filing FAFSA, you will get your Student Aid Report (SAR) in your email. You reported receiving your SAR already. Great!</p> <p>Part 2: (2/3) If you can't find your SAR, it should be in your email. If you need help, let me know.</p> <p>Part 3: (3/3) If you do have your SAR, take 10 minutes to review it and make sure all of the info is correct.</p>
<p>2</p>	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Once you have it, check your SAR to see if you are selected for income verification. If you are, your school needs more info to give you aid.</p> <p>Part 2: (2/2) If not, still take 5 minutes to call your college's financial aid office. Ask if they have what they need & when you will get your aid package if you don't have it already.</p>
<p>3</p>	<p>Part 1: (1/2) Hi [PARTICIPANT NAME]. Just following up. The financial aid process can be challenging, and I wanted to check in and make sure you were all set.</p> <p>Part 2: (2/2) Did you have a chance to check in with your financial aid office? If you have any questions, just let me know. –[EOC STAFF MEMBER]</p>
	<p>MOVE TO COLLEGE / FINANCIAL AID ACCEPTANCE MODULE</p>

Customization Data Fields

The data points that will be used to customize message content and timing are outlined below. MDRC and EOC staff will collect this information outside of the messaging system and will provide all data points to the technology partner in the form of file uploads or direct data inputs via the system dashboard.

Message Customization

- Participant Name
- Participant Cell Phone Number
- EOC Name
- EOC Staff Name
- EOC Hours of Operation
- EOC Phone Number
- Name of College if Participant Reported
- URL for College Application Page
- College Admission's Phone Number
- State's Child Care Development Fund voucher program name
- State's Child Care Development Fund voucher URL
- Name of public child care / pre-k program in name of locality
- Local child care / pre-k resources URL
- Link to information about school's public transportation URL

Module Segmentation

- FAFSA Status
- College Enrollment Status
- Target Enrollment Date
- Applicable Life Circumstances

APPENDIX B: PARTNER QUALIFICATION CHECK-LIST

Dimension	Capability	Required /Preferred (R/P)	Qualification met (Y/N)	
Data management	1	Securely store and manage participant data	R	
	2	Import relational data files	R	
	3	Export raw and complete interaction data	R	
	4	Automatically collect data on participant engagement, including number of text messages sent to participants, links clicked, replies received (and from whom), opt-out rates, and EOC staff engagement with platform	R	
	5	Display system interaction and aggregate participant-level data on a system dashboard	R	
	6	Structure account access to include one central administrative user, 20 EOC subaccounts, and EOC staff user accounts, all with differing capabilities	R	
	7	Flag unanswered participant text response messages	R	
	8	Regularly assess and report to MDRC on whether cell phone numbers remain active for EOC participants	R	
	9	Ability to use alternate contact information to contact participants with inactive cell phone numbers	P	
	10	Ability to communicate with other data management systems	P	
Customization	1	Automatically personalize message topics and content based on participant characteristics and other information provided by MDRC, EOC staff, and participants	R	
	2	Use natural language processing to flexibly recognize key words or phrases that participants are prompted to reply with in order to receive subsequent messages	R	
	3	Send messages from phone numbers using an area code local to each EOC	R	
	4	Allow administrative user account to create and send batch text messages to selected sets of participants	R	
	5	Embed active and shortened hyperlinks to additional multimedia content in large-scale scheduled message batches	R	
	6	Set and implement a personalized schedule of	R	

Dimension	Capability		Required /Preferred (R/P)	Qualification met (Y/N)
		message distribution for each participant		
User experience	1	Provide users with training on the platform	R	
	2	Provide an easy but secure log-in system for MDRC and EOC staff	R	
	3	Maintain the platform and provide ongoing support as needed	R	
	4	Ensure that the online platform is fully functional on all major internet browsers	R	
	5	Offer a mobile version of platform interface	P	
	6	Enable EOC staff to receive notifications about incoming participant messages on existing email accounts	P	
Participant experience	1	Enable two-way interaction so participants can respond with text messages directly to their EOC advisor's subaccount	R	
	2	Send large batch messages but avoid having batch-distributed messages caught in spam filters	R	
	3	Enable the use of EOC logos as contact images seen by participants	P	
Technology partner experience	1	Experience working with participants similar to the EOC target population	P	
	2	Experience working on education-related projects of a similar size and scope	P	

APPENDIX C: PAST PERFORMANCE QUESTIONNAIRE

Vendor name	<i>Bidder name</i>
Person completing form	<i>Name of person who will complete this questionnaire</i>
Client organization	<i>Organization/business providing reference</i>
City, State	<i>City and state of client's organization/business</i>
Name of Project/Product	<i>Name of project completed by the vendor</i>
Date(s) Work Performed	<i>e.g., from 1/1/16-6/30/16</i>
Description of Work Performed: <i>Please limit your description to a half-page.</i>	

The vendor named above is submitting a proposal to provide a text messaging platform that will be used to send customized text messages as part of a large-scale, randomized controlled trial evaluation sponsored by the U.S. Department of Education's Institute of Education Sciences and Office of Postsecondary Education. The evaluation is being conducted by MDRC, a non-profit social policy research firm, and Dr. Lindsay Page of the University of Pittsburgh. We would appreciate your response to the following eight questions. Please send this completed document in electronic form to TextEd@mdrc.org no later than **3 PM Eastern Time on June 26, 2017**.

1. How satisfied were you with the technical quality of the programming staff implementing your text message program or other data collection? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
2. How satisfied were you with the clarity of communication with the team implementing the work? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
3. How satisfied were you with the clarity of program user training provided by the organization? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
4. How satisfied were you with the quality control procedures and testing this organization used to detect and fix errors prior to the launch of the program? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
5. How satisfied were you with this organization's ability to meet deadlines? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
6. How well did this organization's work meet your expectations? Please mark one only.					
Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Dissatisfied	Extremely Dissatisfied	N/A
7. What did this organization do well?					
8. What do you wish this organization had done better?					

Thank you. Please send this completed document in **electronic** form to Amanda Grossman at **TextEd@mdrc.org** no later than **3 PM Eastern Time on June 26, 2017.**

APPENDIX D: FEDERAL REQUIREMENTS

Federal Acquisition Regulations

52.246-4	Inspection of Services—Fixed Price	AUG 1996
52.246-5	Inspection of Services—Cost Reimbursement	APR 1984
52.203-6	Restrictions on Subcontractor Sales to the Government	SEP 2006
52.203-7	Anti-Kickback Procedures	MAY 2014
52.203-8	Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity	MAY 2014
52.203-10	Price or Fee Adjustment for Illegal or Improper Activity	MAY 2014
52.203-12	Limitation on Payments to Influence Certain Federal Transactions	OCT 2010
52.203-13	Contractor Code of Business Ethics and Conduct	APR 2010
52.203-17	Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights	APR 2014
52.209-6	Protecting the Government Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment	AUG 2013
52.215-2	Audit and Records—Negotiation	OCT 2010
52.215-13	Subcontractor Certified Cost or Pricing Data--Modifications	OCT 2010
52.215-23	Limitation on Pass-Through Charges	OCT 2009
52.216-7	Allowable Cost and Payment	JULY 2013
52.222-35	Equal Opportunity for Veterans	JUL 2014
52.222-37	Employment Reports on Veterans	JUL 2014
52.222-50	Combating Trafficking in Persons	MAR 2015
52.222-54	Employment Eligibility Verification	AUG 2012
52.224-1	Privacy Act Notification	APR 1984
52.224-2	Privacy Act	APR 1984
52.225-13	Restrictions on Certain Foreign Purchases	JUN 2008
52.230-2	Cost Accounting Standards	MAY 2014
52.230-3	Disclosure and Consistency of Cost Accounting Practices	MAY 2014
52.232-20	Limitation of Cost	APR 1984
52.243-1 (I)	Changes—Fixed Price (Alternate I - APR 1984)	AUG 1987
52.243-2 (I)	Changes—Cost Reimbursement (Alternate I - APR 1984)	AUG 1987
52.244-6	Subcontracts for Commercial Items	MAR 2015
52.222-40	Notification of Employee Rights Under the National Labor Relations Act	DEC 2010
52.242-3	Penalties for Unallowable Costs	MAY 2014

Department of Education Regulations

3452.208-72	Paperwork Reduction Act.	MAY 2011
3452.209-71	Conflict of Interest.	MAY 2011
3452.224-70	Release of Information Under the Freedom of Information Act.	MAY 2011
3452.224-71	Notice About Research Activities Involving Human Subjects.	MAY 2011
3452.224-72	Research Activities Involving Human Subjects.	MAY 2011
3452.227-73	Limitations on the Use or Disclosure of Government-Furnished Information Marked with Restrictive Legends	MAY 2011
3452.239-72	Department Security Requirements.	MAY 2011