

REQUEST FOR PROPOSALS
#FY23-004
GRANT CONSULTING SERVICES
THIRD-PARTY EVALUATOR

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REQUEST FOR PROPOSALS
RFP #FY23-004 Grant Third-Party Evaluator

SECTION 1: GENERAL INFORMATION

- 1.1 Introduction: West Virginia University at Parkersburg (WVUP) is soliciting bids for qualified firms/individuals to conduct a combined implementation and outcomes evaluation for a federal award under Round 2 of the U.S. Department of Labor's (DOL) Strengthening Community Colleges Training Grants (SCC2) program (FOA-ETA-22-02). WVUP and its partner colleges will be implementing the Pathways to Nursing Success (PNS) program and will be engaging closely with the third-party evaluator selected under this RFP.
- 1.2 Instructions to bidders: See Exhibit A for bidder instructions.
- 1.3 General terms and conditions: See Exhibit B.
- 1.4 Schedule of Events:

Release of RFP: November 2, 2022
Question Deadline: November 16, 2022
Addendum/Response to Questions: November 23, 2022
Proposal Due Date: November 30, 2022, by 3:00pm EST
Target Award Date: December 14, 2022
- 1.5 Posting of Information: This RFP and any addenda, including answers to questions, will be posted at <https://www.wvup.edu/faculty-staff/information-for-faculty-staff/business-office/current-bids-proposals/>.
- 1.6 Bid responses can be mailed or hand delivered. All bids must be received prior to the date and time listed above. See Instructions to Bidders (Exhibit A) for address information.
- 1.7 Proposals shall remain in effect ninety (90) days from the submission date.
- 1.8 Expenses: The state will not be held liable for any expenses incurred by any bidder responding to this RFP including expenses to prepare or deliver the proposal or attend any oral presentation.
- 1.9 Interviews: Discussions and/or interviews may be held with the bidders under final consideration prior to making a selection for award; however, the RFP may be awarded without such discussions or interviews.
- 1.10 Award: It is anticipated that a single contract will be awarded for all services. However, the State reserves the right to configure the contract in whatever manner is in its' best interests.

SECTION 2: BACKGROUND INFORMATION

WVUP is the prime awardee and lead entity on a \$6,488,966 SCC2 grant award from the U.S. DOL. WVUP, BridgeValley Community and Technical College (CTC), and Southern Community and Technical College (CTC) have formed a consortium to implement the Pathways to Nursing Success (PNS) program. PNS will incorporate ASCEND services into the program design, which include direct advising to students, tutoring and learning supports, and financial support, as permitted. ASCEND is a state-wide initiative being implemented at the CTCs, and the PNS program is an opportunity to integrate these supports with the nursing programs at the three consortium colleges.

The DOL requires all SCC2 grantees to procure a third-party evaluator to conduct either an implementation or developmental evaluation. DOL also invited SCC2 applicants to apply for additional funds to create an outcomes evaluation in addition to the implementation or developmental evaluation. WVUP applied for, and successfully was awarded, additional funds to conduct a mixed-methods outcomes evaluation. This procurement encompasses both an implementation and an outcomes evaluation design implemented by the successful bidder.

SECTION 3: SCOPE OF SERVICES

This RFP may contain mandatory provisions identified by the use of the words “must, will and shall.” Failure to comply with a mandatory term in the RFP will result in bid disqualification.

The overall purpose of this RFP is to hire a third-party evaluator to conduct both an implementation and outcomes evaluation. The third-party evaluator will assist WVUP and consortium partners with implementing continuous improvement, maximizing grant performance, and measuring impact. The third-party evaluator will work at the direction of the PSN Project Director.

General Tasks

Once the third-party evaluation contract is executed, the PNS Project Director will meet with the third-party evaluator to review the grant materials. Working with the PNS Project Director and DOL’s national evaluation contractor, the evaluator will refine the logic model, define research questions and research objectives, and determine the most appropriate rigorous research design, data measures, data sources, data collection plans and analytic methods that will be used to measure the impact of proposed service interventions on the desired outcomes. The evaluator will also develop a progress report tool to capture data related to measures of progress toward each of PNS’ capacity-building and equity outcomes and to capture all needed data about PNS’ progress toward its milestones and deliverables. Each consortium college will be required to use this tool and upload their data, as well as report any strategies they are undertaking, the outcomes of those strategies, and the target date for completion. Grant staff at each college will also provide narrative explanations of any challenges they are encountering or any factors they believe are contributing to the successful progress and outcomes.

The evaluator will assist the PNS Project Director with compiling reports and data needed for quarterly narrative and performance reports submitted to DOL. The evaluator will help disseminate results to grant staff and the PNS Advisory Committee, which will consist of nursing faculty from each institution, ASCEND advisors from each institution, the nurse retention specialist from each

college, partnering employers, nonprofit partners, and public workforce system partners. The evaluator will document feedback and perspectives of the PNS Advisory Committee as part of the evaluation plan.

Implementation Evaluation

As required in WVUP's SCC2 Statement of Work (SOW), the third-party evaluator will conduct an implementation evaluation. The evaluator will extract quantitative student outcome measures from data provided by the colleges. Qualitative data collection will focus on implementation challenges, innovations implemented, and stakeholder experiences. Examples of data collection methods should include:

1. Project staff interviews related to implementation, innovation and perceptions
2. Faculty interviews related to curriculum or pedagogical changes, innovation and perceptions
3. Student interviews related to experiences and perceptions

The evaluator will report out to project staff at predetermined points in time to assess student progress, retention and completion measures, in addition to fidelity of project plan and progress relative to the project's theory of change. Specific deliverables aligned to the Implementation Evaluation include the following:

Deliverable	SCC2 Due Dates
Submit a Draft Detailed Evaluation Design , from the evaluator using guidance provided by DOL.	No later than Month 9 (June 30, 2023)
Submit a Final Detailed Evaluation Design in collaboration with the third-party evaluator.	No later than Month 12 (September 30, 2023)
Ensure that the third-party evaluator carries out the evaluation and completes all tasks and deliverables, and provides ongoing input and consultation	Throughout
Submit the evaluator's Interim Implementation Evaluation Report to the grantee's Federal Project Officer (FPO) and Program Office using the suggested format or similar layout, provided after the grant award.	No later than Month 27 (December 31, 2024)
Submit the evaluator's Final Implementation Evaluation Report using the suggested format or similar layout.	No later than Month 48 (September 30, 2026)

The Appendix breaks down the components expected in an evaluation plan, describing each component and providing a checklist to assist evaluators in meeting the fully addressed standards and reviewers in providing actionable feedback. The evaluation plan is intended to act as a stand-alone document and should include all of the necessary information to ensure readers have a complete understanding of the program and its evaluation.

1. Does the ASCEND/ASAP model correlate with improvement in students' self-reported engagement in their studies?

Does the ASCEND/ASAP model correlate with improvement in students' early labor market Any individual(s) submitting bids for this project must be aware of the following components of the evaluation plan.

Outcomes Evaluation

The overall evaluation plan and deliverables contained within the Implementation Evaluation section shall incorporate an Outcomes Evaluation component. The evaluator shall conduct a longitudinal outcomes evaluation to assess student retention, progress toward degrees, and degree completion. This research will generate information about the applicability of the ASCEND/ASAP model in rural locations, adding to what is known about the model from similar evaluations in New York City and Ohio. The outcomes evaluation will also add two additional outcomes that have not been directly assessed in prior evaluations of the ASCEND/ASAP model— student engagement and early labor market success. The outcomes evaluation will use a mixed- methods design to answer the following overarching research questions:

2. What is the applicability of the ASCEND/ASAP model to rural areas?
 - a. Does the model correlate with improvements in student retention in this setting?
 - b. Does the model correlate with improvements in student progress toward degree?
 - c. Does the model correlate with improvements in student degree completion in this setting?
3. outcomes—employment and earnings?
4. How is the new model received and operationalized across three rural West Virginia colleges?
5. Does institutional variance create outcomes variance in the ASAP model?

SECTION 4: VENDOR INFORMATION AND QUALIFICATIONS

Provide a statement/response to each of the following:

- 4.1 Identify and provide a statement of qualifications of individuals to be assigned direct responsibility for the services.
- 4.2 Describe the experience that key personnel have, their length of service with the firm, as well as other relevant skills, including the following:
 - Evaluator must have experience evaluating DOL grants of similar size and scope. Preference is given to evaluators who did consortia evaluation projects on DOL TAACCCT grants.
 - Evaluator must have prior experience evaluating community college consortia.
 - Evaluator must demonstrate expertise in both quantitative and qualitative analyses.
- 4.3 Describe the Firm's size, illustrating its ability to fulfill the terms of the RFP.
- 4.4 Describe any related experience on evaluations of a similar size and scope.
- 4.5 Provide a complete description of how the work will be conducted outlined in Section 3, including all quality assurances that are provided in the firm's process for this type of work and detail the amount of time and effort that will be required of the entities' personnel. Include in this description an explanation of the tools/technology used to collect/coordinate requested items.
- 4.6 Provide the names, telephone numbers and mailing addresses of at least three higher education clients and the contact person from whom references may be obtained for both the firm and the key personnel assigned to the engagement. References should be from clients comparable to the type and scope of services solicited in this RFP.

SECTION 5: BIDDER RESPONSE AND EVALUATION CRITERIA

- 5.1 Economy of Preparation: Proposals should be prepared simply and economically, providing a straightforward, concise description of the bidder's ability to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

NOTE: ALL PRICES ARE TO BE PROVIDED IN A SEPARATE SEALED ENVELOPE LABELED AS PRICING INFORMATION. SEE EXHIBIT C.

- 5.2 Proposals should be limited to ten (10) pages. Additional material may be presented as exhibits to the main proposal.
- 5.3 The proposal will be evaluated on a one hundred (100) point scale with points assigned as outlined below.

Vendors failing to score at least 70% or 49 points for Sections 3 and 4 will not be considered to have met the minimum acceptable score. Any vendor not meeting the minimum acceptable score will NOT have their prices opened and will NOT be considered for award of the bid.

- 5.3.1 Qualifications, Experience and Company Background – 35 points
Responses to Section 4.1, 4.2, 4.3, and 4.4 will be reviewed and evaluated here. The evaluator must have experience evaluating DOL grants of similar size and scope. Preference will be given to an evaluator with experience in evaluating DOL TAACCCT grants.
- 5.3.2 Services and References – 35 points - Responses to Section 4.5 and 4.6 and the bidder's thoroughness in describing methodologies used to conduct both the implementation evaluation and outcomes evaluation will be scored here.
- 5.3.3 Price – 30 points - The low bid will receive the full thirty (30) points. Each higher bid will receive a percentage of the thirty (30) points on a ratio basis compared to the low bid cost.
- 5.4 Award will be made to the bidder receiving the highest point total.
- 5.5 In the event that mutually acceptable terms cannot be reached within a reasonable period of time, with the highest ranked bidder, the state reserves the right to undertake negotiations with the next highest ranked bidder and so on until mutually acceptable terms can be reached.

EXHIBIT A

INSTRUCTIONS TO VENDORS

1. REVIEW DOCUMENTS THOROUGHLY: The attached documents contain an RFP/RFB for bids. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Request for Proposals (RFP) or Request for Bids (RFB). Failure to do so may result in disqualification of vendor's bid.

2. MANDATORY TERMS: The RFP/RFB may contain mandatory provisions identified by the use of the words "must," "will," and "shall." Failure to comply with a mandatory term in the RFP/RFB will result in bid disqualification.

3. PREBID MEETING: The item identified below shall apply to this RFP/RFB.

[X] A pre-bid meeting will not be held prior to bid opening

[] A MANDATORY PRE-BID meeting will be held at the following place and time:

4. VENDOR QUESTION DEADLINE: Vendors may submit questions relating to this RFP/RFB. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the e-mail address listed below to be considered. Submitted e-mails should have RFP/RFB number in the subject line.

A written response will be published in an RFP/RFB addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this RFP/RFB are preliminary in nature and are nonbinding.

Submit Questions to: Jeannine.ratliffe@wvup.edu
Question Submission Deadline: November 16th, 2022

5. VERBAL COMMUNICATION: Any verbal communication between the vendor and any WVUP or Consortium personnel is not binding, including verbal communication at the mandatory pre-bid conference (if applicable). Only information issued in writing and added to the RFP/RFB by an official written addendum is binding.

6. BID SUBMISSION: All bids must be submitted by mail or hand delivered to the address below:

Bid delivery address:

West Virginia University at Parkersburg
300 Campus Drive
Parkersburg, WV 26104
Attention: Jeannine Hetrick-Ratliffe, CPO

Hand delivered or mailed bids should clearly identify the Bid/RFP Number on the envelope. Mailed or delivered vendor responses should include one (1) original and a flash/thumb drive

with an electronic copy of the bid delivered by the date and time shown in Section 7 (below) Additionally, the vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

7. BID OPENING: Bids submitted in response to this RFP/RFB will be opened at the location identified below on the date and time listed below. Delivery of a bid, whether by hand or mail, after the bid opening date and time will result in bid disqualification.

Bid Opening Date and Time: November 30th, 2022, by 3:00pm EDST

Bid Opening Location: 300 Campus Drive, Parkersburg WV 26104

8. SIGNATURE/CERTIFICATION: Bids must be certified/signed and authorized by the vendor to execute and submit this bid. Signer must be authorized to bind the vendor in a contractual relationship. See Exhibit D.

9. ADDENDUM ACKNOWLEDGEMENT: Changes or revisions to this RFP/RFB will be made by an official written addendum. Vendor should acknowledge receipt of all addenda issued with this RFP/RFB by completing an Addendum Acknowledgment Form, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing. See Exhibit E

10. BID FORMATTING: Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

11. EXCEPTIONS AND CLARIFICATIONS: The RFP/RFB contains the specifications that shall form the basis of a contractual agreement. Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid. Exceptions to, clarifications of, or modifications of a requirement or term and condition of the RFP/RFB may result in bid disqualification.

12. COMMUNICATION LIMITATIONS: Communication with WVUP or any members of the consortium or any of its employees regarding this RFP/RFB during the RFP/RFB, bid, evaluation, or award periods, except through Jeannine Hetrick-Ratliffe, the Chief Procurement Officer, is strictly prohibited without prior approval.

13. REGISTRATION: Prior to award of any contract award in the amount of \$25,000 or greater, the apparent successful vendor must be properly registered with the West Virginia Purchasing Division and must have paid the \$125 fee, if applicable.

14. UNIT PRICE: Unit prices shall prevail in cases of a discrepancy in the vendor's bid.

15. WAIVER OF MINOR IRREGULARITIES: WVUP reserves the right to waive minor irregularities in bids or specifications.

16. NON-RESPONSIBLE: WVUP reserves the right to reject the bid of any vendor as non-Responsible in accordance with W. Va. Code of State Rules § 148-1- 5.3, when the Chief Procurement Officer determines that the vendor submitting the bid does not have the capability to fully perform or lacks the integrity and reliability to assure good-faith performance."

17. ACCEPTANCE/REJECTION: WVUP may accept or reject any bid in whole, or in part if it is found to be in the best interest of WVUP and the consortium.

18. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the RFP/RFB and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to WVUP constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. WVUP will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

19. INTERESTED PARTY DISCLOSURE: West Virginia Code § 6D-1-2 requires that the vendor submit a disclosure of interested parties to the contract for all contracts with an actual or estimated value of at least \$1 million. That disclosure must occur on the form prescribed and approved by the WV Ethics Commission prior to contract award.

A copy of the Interested Party Disclosure Form, if required, will be provided to the vendor. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

20. TAXPAYER IDENTIFICATION NUMBER: The Internal Revenue Service (IRS) requires the State to request a taxpayer identification number (TIN) for tax reporting purposes. IRS Form W9 is used to obtain this information.

21. WITH THE BID REQUIREMENTS: In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, WVUP reserves the right to request those items after bid opening and prior to contract award. The State required WV96 form must be executed prior to a contract award.

22. EMAIL NOTIFICATION OF AWARD: WVUP will attempt to provide bidders with e-mail notification of contract award when an RFP/RFB that the bidder participated in has been awarded. For notification purposes, bidders must provide the WVUP with a valid email address in the bid response. Bidders may also monitor WVUP's website to determine when a contract has been awarded.

EXHIBIT B
GENERAL TERMS AND CONDITIONS

1. CONTRACTUAL AGREEMENT: Issuance of a Purchase Order signed by the WVUP's Director of Purchasing, or their designee, and approved as to form by the Attorney General's Office constitutes acceptance by WVUP of this Contract made by and between the WVUP and the Vendor. Vendor's signature on its bid, or on the Contract if the Contract is not the result of a bid RFP/RFB, signifies vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this RFP/RFB/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this RFP/RFB/Contract.

2.1. "Agency" or "Agencies" means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the RFP/RFB or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or "Proposal" means the vendors submitted response to this RFP/RFB.

2.3. "Director of Purchasing" means the individual authorized to sign Purchase Order/Contracts.

2.4. "West Virginia University at Parkersburg" means the entity identified on the first page of the RFP/RFB who is issuing the solicitation.

2.5. "Contract" or "Purchase Order" means the binding agreement that is entered into between WVUP and the vendor to provide the goods or services requested in the RFP/RFB.

2.6. "Award Document" means the document signed by WVUP and approved as to form by the Attorney General, that identifies the vendor as the contract holder.

2.7. "RFP/RFB" means the official notice of an opportunity to supply WVUP with goods or services.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, institutions etc. as context requires.

2.9. "Vendor" or "Vendors" means any entity submitting a bid in response to the RFP/RFB, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

3. CONTRACT TERM; RENEWAL; EXTENSION: The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

Term Contract

Initial Contract Term: The Contract Term will be for four (4) years. The Initial Contract Term becomes effective on the effective start date listed on the first page of this Contract, and the Initial Contract Term ends on September 30, 2026, in alignment with the SCC grant term.

Renewal Term: There are no anticipated renewal options.

Automatic renewal of this Contract is prohibited.

4. **AUTHORITY TO PROCEED:** Vendor is authorized to begin the performance of this contract upon receipt of a signed Purchase Order.
5. **QUANTITIES:** The quantities required under this Contract shall be identified in the RFP/RFB/Purchase Order.
6. **INSURANCE:** The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below and must include WVUP as an additional insured on each policy prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, vendor shall provide WVUP with proof that the insurance mandated herein has been continued. Vendor must also provide WVUP with immediate notice of any changes in its insurance policies, including but not limited to, policy cancelation, policy reduction, or change in insurers. The apparent successful vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award.

Vendor must maintain:

☒ **Commercial General Liability Insurance** in at least an amount of: \$1,000,000.00 per occurrence.
7. **WORKERS' COMPENSATION INSURANCE:** Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.
8. **ACCEPTANCE:** Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to WVUP that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the RFP/RFB for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the RFP/RFB unless otherwise indicated.
9. **PRICING:** The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this RFP/RFB/Contract by WVUP. A vendor may request

the inclusion of price adjustment provisions in its bid, but final approval of any price adjustments will be made by WVUP.

10. PAYMENT IN ARREARS: Payments for goods/services will be made in arrears only upon receipt of a proper invoice, detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software maintenance, licenses, or subscriptions may be paid annually in advance.

11. PAYMENT METHODS: Vendor must accept payment by electronic funds transfer and/or P-Card. (The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards and is the preferred method of payment.)

12. PROGRESS PAYMENTS: Progress payments for services satisfactorily completed may be made pursuant to a payment schedule which is deemed satisfactory to WVUP and is included in the bidder's response to this RFP.

13. TAXES: The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

14. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not expressly provided for in the RFP/RFB.

15. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available. If that occurs, WVUP may notify the vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

16. CANCELLATION: WVUP reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract.

17. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution or West Virginia Code, is void and of no effect.

18. COMPLIANCE WITH LAWS: Vendor or approved Subcontractor shall comply with all applicable federal, state, and local laws, regulations, and ordinances. By submitting a bid, vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

19. ARBITRATION: Any references made to arbitration contained in this Contract, vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby

deleted, void, and of no effect.

20. MODIFICATIONS: Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Commission /Institution and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

21. WAIVER: The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

22. SUBSEQUENT FORMS: The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by vendor to WVUP such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

23. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the vendor without the express written consent of WVUP and the Attorney General's Office (as to form only).

24. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the WVUP; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

25. STATE EMPLOYEES: State employees (including WVUP and consortium institution employees) are not permitted to utilize this Contract for personal use and the vendor is prohibited from permitting or facilitating the same.

26. PRIVACY, SECURITY, AND CONFIDENTIALITY: The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from WVUP, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to WVUP's policies, procedures, and rules.

27. LICENSING: Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Upon request, the vendor must provide all necessary releases to obtain information to enable WVUP to verify that the vendor is licensed and in good standing with the above entities.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up to date on all state and local obligations as described in this section. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

28. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Purchase Order with the WVUP or any Institution of the State of West Virginia, the vendor agrees to convey, sell, assign, or transfer to the institution all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by WVUP. Such assignment shall be made and become effective at the time WVUP tenders the initial payment to vendor.

29. VENDOR CERTIFICATIONS: By signing its bid or entering into this Contract, vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed this RFP/RFB in its entirety; understands the requirements, terms and conditions, and other information contained herein.

Vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to WVUP. The individual signing this bid or offer on behalf of the vendor certifies that he or she is authorized by the vendor to execute this bid or offer, or any documents related thereto on vendor's behalf; and that he or she is authorized to bind the vendor in a contractual relationship.

30. VENDOR RELATIONSHIP: The relationship of the vendor to WVUP shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this RFP/RFB and resulting contract. Neither the vendor, nor any employees or subcontractors of the vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless WVUP and shall provide the State and WVUP with a defense against any and all claims including, but not limited to,

the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

31. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and WVUP, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

32. PURCHASING AFFIDAVIT: In accordance with West Virginia Code §5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State, Vendors are required to sign, notarize, and submit the Purchasing Affidavit to WVUP affirming under oath that it is not in default on any monetary obligation owed to the state or a political subdivision of the state.

33. CONFLICT OF INTEREST: Vendor, its officers, members, or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members, and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to WVUP.

34. BACKGROUND CHECK: In accordance with W. Va. Code §15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at WVUP based upon results addressed from a criminal background check.

35. INTERESTED PARTY SUPPLEMENTAL DISCLOSURE: W. Va. Code § 6D-1-2 requires that for contracts with an actual or estimated value of at least \$1 million, the vendor must submit to WVUP a supplemental disclosure of interested parties reflecting any new or differing interested parties to the contract, which were not included in the original pre- award interested party disclosure, within 30 days following the completion or termination of the contract. A copy of that form will be provided by WVUP if needed. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

36. VOID CONTRACT CLAUSES: WVUP is requiring the vendor to follow the provisions of West Virginia Code §5A-3-62, which automatically voids certain contract clauses that violate State law.

37. GRAMM-LEACH-BLILEY ACT: (GLBA) requires the University to take reasonable steps to select and retain service providers who maintain appropriate safeguards for covered data and information. The vendor agrees to implement and maintain a written comprehensive information security program containing administrative, technical and physical safeguards for the security and protection of

customer information and further containing each of the elements set forth in § 314.4 of the Gramm Leach Bliley Standards for Safeguarding Customer Information (16 C.F.R. § 314). The Vendor further agrees to safeguard all customer information provided to it under this Agreement in accordance with its information security program and the Standards for Safeguarding Customer Information.

EXHIBIT C
PRICING PAGE

THE PROJECT AND THE PARTIES

1.01 TO:

A. Owner
West Virginia University at Parkersburg
300 Campus Drive
Parkersburg, WV 26104

1.02 FOR:

A. Project: Third Party Evaluator

1.03 DATE: _____

1.04 SUBMITTED BY:

A. Bidder's Full Name _____
1. Address _____
2. City, State, Zip _____

1.05 OFFER

A. Having examined the Place of the Work and all matters referred to in the Instructions to Bidders and the Contract Documents prepared for the above mentioned project, we, the undersigned, hereby offer to enter into a Contract to perform the Work for the Sum of:

B. Total Proposal:

_____ dollars
(\$ _____), in lawful money of the United States of America.

C. All applicable federal taxes are included and State of West Virginia taxes are included in the Bid Sum.

1.06 ACCEPTANCE

- A. This offer shall be open to acceptance and is irrevocable for ninety days from the bid closing date.
- B. If this bid is accepted by Owner within the time period stated above, we will execute the Agreement within ten days of receipt of Notice of Award.

BID FORM SIGNATURE(S)

(Bidder – print the full name of your firm)

(Authorized signing officer)

(Print Authorized signing officer, Title)

END OF BID FORM

EXHIBIT D
BID CERTIFICATION/SIGNATURE

1. DESIGNATED CONTACT: Vendor appoints the individual identified as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Name, Title)

(Printed Name and Title)

(Address)

(Phone Number)

(Email address)

2. CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through e-mail, I certify that: I have reviewed this RFP/RFB in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to WVUP that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the RFP/RFB for that product or service, unless otherwise stated herein; that the vendor accepts the terms and conditions contained in the RFP/RFB, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand WVUP is requiring the vendor to follow the provisions of WV State Code 5A-3-62 which automatically voids certain contract clauses that violate State law.

(Company)

(Authorized Signature) (Representative Name, Title)

(Printed Name and Title of Authorized Representative)

(Date)

(Phone Number)

EXHIBIT E
ADDENDUM ACKNOWLEDGEMENT FORM

Instructions: Please acknowledge receipt of all addenda issued with this RFP/RFB by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

☐ Addendum No. 1
☐ Addendum No. 2
☐ Addendum No. 3
☐ Addendum No. 4
☐ Addendum No. 5

☐ Addendum No. 6
☐ Addendum No. 7
☐ Addendum No. 8
☐ Addendum No. 9
☐ Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between vendor's representatives and any WVUP personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Company

Authorized Signature

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Appendix A

Logic Model for Pathways to Nursing Success (PNS)

Systems Components Table

Inputs	Activities	Outputs	Required Performance Outcomes (short, intermediate and long-term)	Desired Impacts
Grant funding	Amend colleges' policies and practices to address equity gaps	Curriculum enhancements that include more opportunities for active learning	Short-term: 20 more people will apply to each of the colleges' nursing programs annually	Colleges will make measurable progress in terms of their inclusiveness and equity goals
Faculty commitment	Hire additional nursing faculty to increase the number of students the colleges can enroll	100% of nursing students that take advantage of ASCEND	10 more underrepresented people (African Americans, veterans, men) will apply for the colleges' nursing programs as a result of PNS' targeted outreach	Students admitted to the nursing program through a less selective admissions process will have comparable completion and NCLEX-RN pass rates to those admitted through the colleges' existing selective process because of the additional support available through ASCEND and the nurse retention specialist
Nurse retention specialists	Provide professional development for faculty about active learning	3 DEI-related policies and practices adopted	Intermediate: 30% of nursing students will graduate on time, and 50% will graduate in three years	The quality of patient care in WV will be high because there are
Healthcare sector strategy group	Provide comprehensive student supports through ASCEND and the nurse retention specialist's advising	900 students complete an AAS in nursing. (75 students x 3 schools x 4 years)	The first-time NCLEX-RN pass rate will be 85% for all program options (traditional,	
DEI oversight board	Partner with workforce development partners to deliver test preparation for the TEAS-VI and HESI for students applying for the	70% of colleges' nursing graduates pass the NCLEX-RN (n=630 graduates who earn the credential)		
6 employer partners				
4 workforce development partners				
3 nonprofit partners				

	<p>colleges' nursing programs</p> <p>Accelerate the RN degree programs</p> <p>Enhance credit transfer and articulation across the colleges' nursing programs</p>		<p>LPN-RN and Paramedic-RN)</p> <p>95% of all nursing graduates will find employment as a registered nurse if successful on the NCLEX-RN within 6 months after graduation</p> <p><i>Long-term:</i> 20% of RNs that graduate from the program will enroll in a BSN program</p>	<p>enough RNs to care for patients, and employers will reduce their reliance on travel nurses</p>
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Theory of Change

Step 5: Strategies:

- Conduct a data-driven review of each college's policies and practices that promote or detract from equitable access, and modify or create new policies and practices that will increase each campus' diversity, equity and inclusiveness.
- Provide professional development for nursing faculty to improve their ability to promote active and collaborative learning.
- Bolster students' connection to career services by streamlining institution advisors' ability to access timely labor market data as a result of enhanced partnership with the colleges' workforce development partners.
- Provide comprehensive student supports.
- Deliver personalized advising.
- Accelerate the nursing career pathway by eliminating the first semester for students who are licensed practical nurses.

Step 1: Problem or Issue:

- Rural students are an underrepresented minority in college enrollment
- Low enrollment of males, African Americans and veterans in the nursing programs
- High rate of student attrition in the nursing programs during the first year

Step 2: Community Needs/Assets:

- O-Net data shows that demand for RNs in WV in 2028 is expected to be 24,620 and there will be 1,550 job openings for RNs—a 15% increase over 2018.
- The consortium colleges have existing traditional nursing programs and LPN to RN bridge programs that can be expanded and improved.
- The consortium has the commitment of 6 employers who are willing to hire graduates who obtain their license to work as an RN.
- The consortium has the commitment of 4 partners from the workforce development system that will help the consortium recruit more men and students of color.
- The consortium has the commitment of 3 nonprofit partners that will help the consortium recruit more men and students of color.

Step 3: Desired Results:

- The consortium colleges will build their capacity to equitably increase access to education and training for students who aspire to be RNs, especially students of color, men and veterans.
- The consortium colleges will meet the needs of employers and underrepresented workers by accelerating the nursing career pathway.
- The consortium colleges' nursing faculty will adopt active learning teaching methods so students are more engaged in learning and more likely to graduate from the program.
- The consortium colleges will increase their capacity to remove barriers to retention so students who enroll in courses to complete an associate degree in registered nursing pass the NCLEX.
- The consortium colleges will conduct deep equity work to make their campuses more inclusive.

Step 4: Influential Factors:

- The consortium colleges have already implemented accelerated developmental education courses to reduce the time to completion for nursing students who lack foundational knowledge in reading and/or math.
- There are existing articulation agreements between the consortium colleges.
- There is shared faculty in the nursing programs at WVUP and BV.
- There is a shared curriculum in the nursing programs at WVUP and BV.
- WVUP has experience with the ASCEND program that can be shared with BV and Southern.
- There is strong employer commitment to this project because the region does not have a sufficient supply of RNs.

Step 6: Assumptions

- WV's low workforce participation rate will support outreach and recruitment efforts to reach members of subgroups that have not considered a career in nursing.
- Candidates for the colleges' nursing faculty positions can be hired quickly.
- Workforce partners will support outreach by helping the consortium colleges identify individuals who will be enthusiastic about this program, e.g., unemployed individuals, TANF recipients, and low-wage incumbent workers such as LPNs and certified nursing assistants.
- Regional demand for nurses will create upward pressure on salaries, making nursing an attractive occupation for people who had not considered a career in nursing before.
- The consortium colleges' existing employers will be able to offer additional slots for clinicals because the LPN-RN and traditional RN programs will be taught on the weekend when there is more availability for clinical supervision.
- The nursing faculty and administrators at the consortium colleges will support the project's efforts to promote equitable access for any student interested in a career in nursing.
- The consortium colleges will dedicate the time needed to collaborate and actively contribute to PNS.

Appendix B

Component Overview	Checklist for Fully Addressing Standards
<p>Introduction and Background</p> <p>The first section of the evaluation plan should be an Introduction followed by a Background section. The Introduction should provide a summary explanation of the evaluation study plan, including the purpose, approach, design, questions, data sources/data collection, and potential analyses. This section should also introduce the third-party evaluator(s) conducting the study. It should be a high-level summary of what the reader will encounter throughout the document, ensuring alignment and clarity. The Background section provides context of the SCC program of interest, or the evaluand, for the reader. This section should include high-level introduction and description of the participating institutions, the rationale for the program, the purpose and/or goals of the program, and the broad activities the program will do to reach those goals. Additionally, the Background section should include a timeline of the program.</p>	<ul style="list-style-type: none"> ✓ An opening statement, with brief SCC program information and name of the evaluand program and introduction to third-party evaluator(s) ✓ High-level summary of the evaluation's purpose, approach, and design ✓ High-level summary of anticipated data sources, data collection activities, and analyses ✓ 2-3 paragraphs describing the evaluation and program, including the name and location of participating institutions, target sample population, program partners (e.g., employers, etc.), goals, and activities ✓ Brief description of the timeline and overarching outcomes of the program

Component Overview	Checklist for Fully Addressing Standards
<p>Logic Model</p> <p>The logic model should graphically represent the evaluation and show the intended relationship between the program's inputs (Resources and Strategies and Activities) and the expected results (Outputs and Short- and Long-term Outcomes). Long-term impacts should also be included on the far right, though will not likely be assessed in the evaluation plan. The logic model should explain how access to and application of resources and strategies will result in a program that reaches the intended target participants <i>and</i>, when these populations are reached by the program, how unmet needs will be met and circumstances will change.</p> <p>The logic model should display the focus or purpose of the evaluation. If the intended evaluation is a <i>process or implementation</i> evaluation, the logic model should include the specific inputs, activities, outputs, and short-term outcomes associated with implementation of the program. This could include examining the relationship between activities, including sequencing, dosage, and timing, as well as how the activities link to outputs and short-term outcomes.</p> <p>A logic model for an <i>outcome evaluation</i> should incorporate all the logic model components for the program with alignment to the short- and long-term outcomes. Outcomes should be feasible and measurable.</p> <p>If the intended evaluation is a <i>developmental evaluation</i>, a theory of change may be better suited for the program depending on its current design and implementation status. The graphic should highlight an evidence-based pathway between the program's context, goals, strategies, and activities as they relate to the desired results of your program but are subject to change as the program evolves.</p>	<ul style="list-style-type: none"> ✓ Include a brief narrative introducing/ explaining the logic model and its alignment across the components. ✓ <i>Problem identification</i> or the issue your program is intended to address or the gap it will fill ✓ <i>Inputs</i> are the resources, personnel, materials, technologies, and other factors that must be in place to implement the program's strategies. This should include SCC grant funding. ✓ <i>Strategies and activities</i> that are designed to achieve outcomes, with important consideration to sequence and order of activities, clustering of activities, and dosage ✓ <i>Outputs</i> or what is done or directly results from activities (data can capture size and scope, describe or count strategies and activities such as participation rates, the number of orientations held, number of materials developed, etc.) ✓ <i>Outcomes</i> or what the implementation of resources, strategies and activities is expected to have on participants. <ul style="list-style-type: none"> ○ Short-term outcomes are most immediate and measurable and can be attributed to strategies and activities. These are typically observable and measurable changes in <i>skills, attitudes, and knowledge</i>. ○ Long-term outcomes are more distant, though anticipated, results of participation in strategies and activities. These are typically observable and measurable changes in <i>behavior and decision-making</i>. ○ Impacts are the outcomes of long-term implementation of strategies and activities and may be affected by conditions beyond the program's scope of strategies. These are typically broader in scope and include changes in <i>status, life conditions, systems, and/or policies</i>.

Component Overview	Checklist for Fully Addressing Standards
<p>Evaluation Objective(s) and Type/Approach</p> <p>Clearly define your evaluation objective(s), or what the study hopes to accomplish and why. Your objective(s) should summarize what you hope will be achieved by the study. A well-defined evaluation objective(s) will narrow and focus the evaluation and ensure that the findings are relevant to decision-makers. This will drive all aspects of the methodology, including evaluation data collection, analysis, and recommendations. The objective(s) also drives the evaluation approach or type that will be applied and the rationale and connection should be made clear.</p> <p>An evaluation type is the framework from which the evaluation is conducted and reflects evaluation objective(s), uses, values, and the level of stakeholder involvement. Evaluation types including <i>developmental evaluations</i>, <i>process evaluations</i>, <i>implementation evaluations</i>, <i>formative evaluations</i>, <i>outcome evaluations</i>, <i>summative evaluations</i>, and <i>impact evaluations</i> (see supplemental material on evaluation types). The SCC program evaluation does not need to nor should incorporate all these evaluation types. The evaluation plan should identify the appropriate type(s) of evaluation based on the program context and evaluation purpose, the rationale for selecting that type(s), and any limitations of conducting that type(s) of evaluation.</p> <p>Evaluators may conduct the evaluation using a particular approach that is best suited for the program context, stakeholder needs, and/or target program participants. Approaches might include <i>participatory evaluation</i>, <i>collaborative evaluation</i>, <i>empowerment evaluation</i>, <i>culturally responsive and critical evaluation</i>, and/or <i>utilization-focused evaluation</i>, among others. If applying a particular evaluation approach, the evaluation plan should identify and describe the approach, including its purpose, framework, and application. The plan should also provide a rationale for the application of the evaluation approach and any limitations.</p>	<p>Your Evaluation Objective(s) should include:</p> <ul style="list-style-type: none"> ✓ A summary of what you hope will be achieved by the study ✓ Clear and aligned to the program's needs and goals ✓ Realistic and feasible (achieved within the expected timeframe and resources) <p>Your Evaluation Type(s)/Approach(es) should include:</p> <ul style="list-style-type: none"> ✓ Identification and explanation of the type(s) of evaluation proposed (e.g., process, implementation fidelity, outcome, etc.) ✓ Clear rationale for selection of evaluation type(s) and potential limitations ✓ Alignment between the evaluation type(s) and the program context, implementation status, and goals ✓ If applying a particular approach, identification and explanation of the approach(es) proposed (e.g., participatory, empowerment, culturally responsive and critical, etc.) ✓ Clear rationale for evaluation approach(es) noting any potential limitations and/or challenges

Component Overview	Checklist for Fully Addressing Standards
<p>Evaluation Questions</p> <p>Building on your evaluation objective(s) and logic model, your evaluation questions should reflect specific information about what can be learned by the evaluation. Your evaluation question(s) should narrow down your broad idea to a topic that can be investigated and reflect a feasible research process. Your questions should be lines of inquiry to explore in trying to solve the overarching research objective. This section should include between one and four broad evaluation questions with evaluation subquestions, if necessary.</p> <p>Evaluation questions should drive the remainder of the evaluation plan, including the study design, sample, data collection, and analyses. Questions should also support the evaluation type(s) and objective(s). For instance, <i>implementation evaluations</i> should develop evaluation questions examining whether the program services were enacted as intended, to what extent program activities led to outputs and short-term outcomes, and/or whether and how program activities changed over time.</p> <p><i>Developmental evaluations</i> should be grounded in questions related to the dynamic shifting and building of the program, to what extent the program's values and principles influenced activities and short-term outcomes, and/or whether and how the broader system and environment was responding to the program.</p> <p><i>Outcome evaluations</i> should be led by questions assessing the effectiveness of a program in producing desired changes. Examples include questions addressing the magnitude of changes, differences in changes experienced by different groups, and/or the aspects of the program that were most beneficial to the changes.</p>	<p>Your evaluation question(s) should be:</p> <ul style="list-style-type: none"> ✓ Focused on a single problem or issue ✓ Researchable using primary or secondary data ✓ Feasible to answer within the timeframe and practical constraints ✓ Specific enough to answer thoroughly ✓ Complex enough to develop the answer over the space of a report ✓ Relevant to the funding agency ✓ Flexible and adaptable enough to be modified as unforeseen constraints require ✓ Aligned to the evaluation objective(s) and logic model. ✓ Broadly experienced in 1-4 overarching questions with potential subquestions, if desired/necessary. ✓ Driving the remainder of the evaluation plan, including the study design, methods, and data collection.

Component Overview	Checklist for Fully Addressing Standards
<p>Study Design</p> <p>Your study design serves as the plan for executing your evaluation type and approach, as identified in the section above. It should address the overall strategy and integrate the different components of the study in a coherent and logical way. Doing so will ensure that you will effectively address the research objective(s). It is a blueprint for data collection, measurement, and analysis of data.</p> <p>The study design should align to the evaluation's purpose (e.g., measuring processes, measuring outcomes, etc.) and should be supported throughout the rest of the evaluation plan.</p> <p>Examples of specific study designs include <i>descriptive study, multiple case study, treatment-group only study, time-series design, pre-post study, explanatory mixed methods designs, correlational, causal, quasi-experimental study, and/or randomized-controlled trial study</i>. The evaluation plan should clearly identify and explain the specific study design, including rationale and limitations. Likewise, some evaluations may call for a phased approach that utilizes more than one design. If so, this component should be delineated by phases with explanations for each phase's design.</p> <p>The study design should be feasible given the resources (e.g., time, funding, personnel, etc.) provided.</p>	<p>The proposed study strategy should do the following:</p> <ul style="list-style-type: none"> ✓ Be appropriate for meeting the identified evaluation objective, type, and approach. ✓ Provide a convincing argument for different features of the design. ✓ Align to the remainder of the evaluation plan. ✓ Be clearly defined and supportive of descriptive/observational, correlational, or causal objectives. ✓ Provide enough rigor for the purpose of the study and ability to lead to the measurement of identified outcomes. ✓ Identify limitations of the design and implications for interpreting its findings.

Component Overview	Checklist for Fully Addressing Standards
<p>Evaluation Measures</p> <p>Data collected using appropriate evaluation measures will tell you how well your program activities have met your expected program outputs and outcomes. Informed by both the logic model and evaluation questions, evaluation measures, or indicators, help guide the selection of data collection methods and the content of data collection instruments. Qualitative or quantitative data may inform these measures.</p> <p>This component should comprise of a table matrix that aligns the evaluation measures to the activities and/or outcomes they are designed to assess. The table matrix should clearly align all of the components of the table and address validity, as well. The evaluation plan should also include a paragraph explaining the table, including brief descriptions of the categories or types of measures.</p> <p>Measures associated with program inputs include such things as organizational characteristics, staffing structures, and service delivery supports. Measures associated with contextual factors and implementation outputs include such things as content developed; quantity or intensity of the services provided; quality and delivery mode of intervention; quantity of participants reached.</p> <p>When evaluating <i>program implementation fidelity or program process</i>, quantitative measures reflect performance and success against predetermined goals and SMART (specific, measurable, achievable, relevant, and time-bound) outcomes. When conducting <i>developmental evaluation</i>, measures act as a tracking mechanism allowing outcomes to quickly emerge and can change throughout the evaluation as the process unfolds. When conducting <i>outcome evaluations</i>, measures should assess whether the program is achieving the expected changes in the short, intermediate, and long term (if feasible).</p> <p>Qualitative measures can also provide valuable information relevant to all types of evaluations and can include such things as program challenges, perceived barriers to success, shared vision, communication, program leadership, and organizational structure.</p>	<ul style="list-style-type: none"> ✓ At a minimum, measures must address the outcomes identified in Exhibit 1. ✓ Measures should be displayed in a table matrix that aligns the activities and/or outcomes with each measure, as well as explanations for the validity of the measures. ✓ Measures can be developed for activities (process indicators) and/or for outcomes (outcome indicators). ✓ There can be more than one measure for each activity or outcome. ✓ The measure must be focused and must measure an important dimension of the activity or outcome. ✓ The measure must be clear and specific in terms of what it will measure. ✓ The change determined by the measure should represent progress toward implementing the activity or achieving the outcome. ✓ Include an explanatory paragraph describing the contents of the table matrix.

Exhibit 1. Required Outcomes for SCC2 to Be Addressed by Both Single Institution and Consortium Grantees

Capacity-Building Outcomes	
Capacity-Building Outcome #1	<ul style="list-style-type: none"> ✓ Must develop capacity-building outcomes and outcomes targets specific to the grant project. <p><i>Each capacity-building outcome:</i></p> <ul style="list-style-type: none"> ✓ Must be tied to a career pathway program to be built or enhanced using SCC grant funds. ✓ Must be tied to the Core Elements (Advancing Equity, Accelerated Career Pathways, Results-driven Project Design, and Sustainable Systems Change) ✓ May address individual, interpersonal, institutional, and/or systemic-level outcomes ✓ Must be connected to positive workforce outcomes. ✓ Must incorporate and/or reflect: <ul style="list-style-type: none"> ○ Outcome statement ○ Type/direction of change (e.g., increase, decrease) ○ Unit of measurement ○ Outcome target ○ Current state or baseline ○ Specific grant-funded program(s) of study ○ Target population ○ Definition(s) that demonstrate(s) or explain(s) when the project achieves the outcome target ○ Timeframe ✓ Must describe the evidence-based rationale connecting the key aspect capacity building, logic model, and equity goals ✓ Must be represented in the logic model
Capacity-Building Outcome #2	
Capacity-Building Outcome #3	
Equity Outcomes	
Equity Outcome #1	<ul style="list-style-type: none"> ✓ Must develop equity outcomes and outcomes targets specific to the grant project. <p><i>Each equity outcome:</i></p> <ul style="list-style-type: none"> ✓ Must be grounded in previously-administered equity gap analysis ✓ May address different aspects of the same identified primary equity gap or address separate equity gaps ✓ Must be connected to specific sectoral or occupational workforce shortage ✓ Must be aligned with a career pathway approach to address worker demand ✓ May address individual, interpersonal, institutional, and/or systemic-level outcomes

<p><i>Equity Outcome #2</i></p>	<ul style="list-style-type: none"> ✓ Must be connected to positive workforce outcomes ✓ Must incorporate and/or reflect: <ul style="list-style-type: none"> ○ Outcome statement ○ Type/direction of change (e.g., increase, decrease) ○ Unit of measurement ○ Outcome target ○ Current state or baseline ○ Specific grant-funded program(s) of study ○ Target population ○ Definition(s) that demonstrate(s) or explain(s) when the project achieves the outcome target ○ Timeframe ○ Description of how the increased equity will be sustained ✓ Must describe the evidence-based rationale connecting the key aspect to the equity gap analysis, logic model, its contribution to target populations' improved employment outcomes, and capacity-building goals ✓ Must be represented in the logic model
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Component Overview	Checklist for Fully Addressing Standards
<p>Data Sources and Data Collection</p> <p>Driven by the evaluation questions, the logic model, and evaluation measures, this component should clearly identify and provide a high-level description of all proposed data sources. When examining the same or similar measures across multiple data sources, the data should be triangulated, or compared, to reinforce the finding.</p> <p>Your evaluation measures may be informed using new data, which involves primary data collection (e.g., surveys, interviews), or existing data which involves secondary data collection (e.g., administrative data, program data). Your chosen data collection methods should consider both the 1) feasibility of collecting the data (e.g., evaluation resources, timeliness of data collection), 2) utility (e.g., data collection frequency vs. point in time, data credibility), 3) propriety (e.g., characteristics of respondents, degree of intrusion to participants, other ethical issues) and 4) accuracy (nature of the issue, sensitivity of the issue, respondent knowledge).</p> <p>Provide a high-level description of preliminary data collection activities and secondary data sources, including those under development as a function of the study design or approach. The description should include the purpose/use of the data, anticipated methods, and potential limitations. Provide any additional information related to data sharing agreements, either secured or in process, or data acquisition concerns.</p> <p>Include in the Appendix of the evaluation plan a table matrix or data crosswalk aligning the data sources to the evaluation questions, measures, and outputs/outcomes, as well as anticipated timeline or timing of collection, where feasible.</p>	<ul style="list-style-type: none"> ✓ Describe preliminary data collection and secondary data availability at a high-level. <ul style="list-style-type: none"> ○ Consider feasibility, utility, propriety, and accuracy ○ Describe the strengths and weaknesses of each data source. ✓ Describe how data collection reflects sound and systematic methods of producing reliable data considering the following: <ul style="list-style-type: none"> ○ Interview methods and recording practices ○ Quality assurance practices (e.g., recording interviews, review of notes by second interviewer) ○ Pending IRB approvals and/or data sharing agreements ○ Areas of potential bias (e.g., onsite interviews of program staff) ○ Provide the intended sample or participants ✓ Describe limitations associated with data sources or data collection and implications for findings. ✓ Include a Data Crosswalk or Table Matrix in the Appendix that displays the alignment of the data sources to the evaluation questions, measures, outputs/outcomes, and timing.

Component Overview

Checklist for Fully Addressing Standards

Sampling Strategy

Sampling is the process of selecting units (e.g., people, organizations) from a population of interest to yield the most relevant information with potential for generalization, if feasible. Since it is often impossible and not practical to enroll the entire population in your study, your evaluation may include more than one sample and can occur at multiple levels (e.g., evaluation sites, stakeholders selected for interviews, participants selected for survey). Choosing a 'correct' sample means making sure that your sample is large enough and representative of the population.

Given the early stages of program design and implementation, it may be likely that the evaluation cannot yet determine the potential sample size or type. In that case, the evaluation plan should include proposed sampling criteria with estimated sample sizes, noting that they may alter based on implementation. However, the evaluation plan should include descriptions of the site(s) in which the program will be implemented and sample will be drawn, such as community college departments, faculty, and/or work-based partners.

Sampling methods include:

Probability	Non-Probability
Simple random sampling	Quota sampling
Stratified random sampling	Purposeful sampling
Cluster sampling	Systematic sampling
Multistage random samples	Convenience sampling
Systematic random sampling	Snowball sampling
	Volunteer sampling

- ✓ Explain and justify the rationale for site selection strategy by describing the following:
 - Design and methods used for selecting sites included in the study
 - The criteria and rationale used in site selection
 - Limitations of site selection
- ✓ Clearly define and defend methods/strategies for drawing samples from data sources by describing the following:
 - The method/criteria for selecting a sample of respondents
 - The method for identifying most appropriate respondents for qualitative research
 - Potential for missing observations and implications for the findings
 - Potential recruitment challenges anticipated
 - Note whether different samples will be drawn for different data sources/collection activities, and why

Component Overview	Checklist for Fully Addressing Standards
<p>Proposed Analyses</p> <p>This component should include your <i>proposed</i> analysis plan for the evaluation type and study design. While detailed models are not necessary, the evaluation plan should include descriptions of the approach and methods for conducting any quantitative and/or qualitative analyses and their alignment to the evaluation questions.</p> <p>Quantitative analysis descriptions should include potential approaches (e.g., ANOVAs, descriptive statistics, regressions, etc.), including a rationale and limitations for the approaches. Where possible, include the anticipated software to be used to conduct the analyses.</p> <p>Qualitative analysis descriptions should include how coding schemes will be developed, the coding process, strategies for ensuring reliability, and identification of themes. Potential examples of analytic approaches including <i>content analysis</i>, <i>thematic analysis</i>, <i>discourse analysis</i>, etc.</p>	<ul style="list-style-type: none"> ✓ Describe all analysis methods (quantitative, qualitative, mixed methods), including the use of analytic software. ✓ Describe any statistical approaches proposed to analyze quantitative data. ✓ As appropriate, provide multiple and/or alternative perspectives and/or triangulation processes. ✓ Demonstrate how the plan will apply consistent and systematic coding processes across data sources. ✓ Describe how the evaluator will develop a coding scheme, coding process, and theme identification strategy. ✓ Ensure alignment with evaluation questions and study design, as well as measures.

Component Overview	Checklist for Fully Addressing Standards
<p>Appendices</p> <p>To ensure completeness of the plan, as well as conciseness of the narrative, each plan should include a series of appendices to expand on the written plan.</p> <p>Appendix A: This appendix should include the data crosswalk matrix aligning the data sources/collection activities to the evaluation questions, evaluation measures, and outputs/outcomes, as well as high-level timing.</p> <p>Appendix B: This appendix should include an evaluation implementation timeline intending to broadly explain the overall timing of the evaluation, including data collection activities and interim and final reports.</p> <p>Appendix C: (Optional) Any other related documents</p>	<ul style="list-style-type: none"> ✓ Matrices are clear and concise for ease of reading and alignment ✓ Evaluation timeline provides a broad overview of major evaluation milestones, including interim and final reports, as well as data collection activities.

Appendix A:
Data Matrix Template

Evaluation Questions	Activities	Indicators/Evaluation Measures	Data Sources/Data Collection
<p><i>Example:</i> To what extent is the program team meeting its intended outcomes?</p>	<ul style="list-style-type: none"> Developing a workforce partnership board using shared leadership Weekly meetings with employer partners in X region 	<ul style="list-style-type: none"> Number of active regional employers on the board Number of board members representing different employer types 	<ul style="list-style-type: none"> Project-level documents including attendance records

Component Overview	Checklist for Fully Addressing Standards
<p>Introduction and Background</p> <p>The first section of the evaluation plan should be an Introduction followed by a Background section. The Introduction should provide a summary explanation of the evaluation study plan, including the purpose, approach, design, questions, data sources/data collection, and potential analyses. This section should also introduce the third-party evaluator(s) conducting the study. It should be a high-level summary of what the reader will encounter throughout the document, ensuring alignment and clarity. The Background section provides context of the SCC program of interest, or the evaluation, for the reader. This section should include high-level introduction and description of the participating institutions, the rationale for the program, the purpose and/or goals of the program, and the broad activities the program will do to reach those goals. Additionally, the Background section should include a timeline of the program.</p>	<ul style="list-style-type: none"> ✓ An opening statement, with brief SCC program information and name of the evaluation program and introduction to third-party evaluator(s) ✓ High-level summary of the evaluation's purpose, approach, and design ✓ High-level summary of anticipated data sources, data collection activities, and analyses ✓ 2-3 paragraphs describing the evaluation and program, including the name and location of participating institutions, target sample population, program partners (e.g., employers, etc.), goals, and activities ✓ Brief description of the timeline and overarching outcomes of the program

Component Overview	Checklist for Fully Addressing Standards
Evaluation Objective(s) and Type/Approach	
<p>Clearly define your evaluation objective(s), or what the study hopes to accomplish and why. Your objective(s) should summarize what you hope will be achieved by the study. A well-defined evaluation objective(s) will narrow and focus the evaluation and ensure that the findings are relevant to decision-makers. This will drive all aspects of the methodology, including evaluation data collection, analysis, and recommendations. The objective(s) also drives the evaluation approach or type that will be applied and the rationale and connection should be made clear.</p> <p>An evaluation type is the framework from which the evaluation is conducted and reflects evaluation objective(s), uses, values, and the level of stakeholder involvement. Evaluation types including <i>developmental evaluations</i>, <i>process evaluations</i>, <i>implementation evaluations</i>, <i>formative evaluations</i>, <i>outcome evaluations</i>, <i>summative evaluations</i>, and <i>impact evaluations</i> (see supplemental material on evaluation types). The SCC program evaluation does not need to nor should incorporate all these evaluation types. The evaluation plan should identify the appropriate type(s) of evaluation based on the program context and evaluation purpose, the rationale for selecting that type(s), and any limitations of conducting that type(s) of evaluation.</p> <p>Evaluators may conduct the evaluation using a particular approach that is best suited for the program context, stakeholder needs, and/or target program participants. Approaches might include <i>participatory evaluation</i>, <i>collaborative evaluation</i>, <i>empowerment evaluation</i>, <i>culturally responsive and critical evaluation</i>, and/or <i>utilization-focused evaluation</i>, among others. If applying a particular evaluation approach, the evaluation plan should identify and describe the approach, including its purpose, framework, and application. The plan should also provide a rationale for the application of the evaluation approach and any limitations.</p>	<p>Your Evaluation Objective(s) should include:</p> <ul style="list-style-type: none"> ✓ A summary of what you hope will be achieved by the study ✓ Clear and aligned to the program's needs and goals ✓ Realistic and feasible (achieved within the expected timeframe and resources) <p>Your Evaluation Type(s)/Approach(es) should include:</p> <ul style="list-style-type: none"> ✓ Identification and explanation of the type(s) of evaluation proposed (e.g., process, implementation fidelity, outcome, etc.) ✓ Clear rationale for selection of evaluation type(s) and potential limitations ✓ Alignment between the evaluation type(s) and the program context, implementation status, and goals ✓ If applying a particular approach, identification and explanation of the approach(es) proposed (e.g., participatory, empowerment, culturally responsive and critical, etc.) ✓ Clear rationale for evaluation approach(es) noting any potential limitations and/or challenges

Component Overview	Checklist for Fully Addressing Standards
<p>Evaluation Questions</p> <p>Building on your evaluation objective(s) and logic model, your evaluation questions should reflect specific information about what can be learned by the evaluation. Your evaluation question(s) should narrow down your broad idea to a topic that can be investigated and reflect a feasible research process. Your questions should be lines of inquiry to explore in trying to solve the overarching research objective. This section should include between one and four broad evaluation questions with evaluation subquestions, if necessary.</p> <p>Evaluation questions should drive the remainder of the evaluation plan, including the study design, sample, data collection, and analyses. Questions should also support the evaluation type(s) and objective(s). For instance, <i>implementation evaluations</i> should develop evaluation questions examining whether the program services were enacted as intended, to what extent program activities led to outputs and short-term outcomes, and/or whether and how program activities changed over time.</p> <p><i>Developmental evaluations</i> should be grounded in questions related to the dynamic shifting and building of the program, to what extent the program's values and principles influenced activities and short-term outcomes, and/or whether and how the broader system and environment was responding to the program.</p> <p><i>Outcome evaluations</i> should be led by questions assessing the effectiveness of a program in producing desired changes. Examples include questions addressing the magnitude of changes, differences in changes experienced by different groups, and/or the aspects of the program that were most beneficial to the changes.</p>	<p>Your evaluation question(s) should be:</p> <ul style="list-style-type: none"> ✓ Focused on a single problem or issue ✓ Researchable using primary or secondary data ✓ Feasible to answer within the timeframe and practical constraints ✓ Specific enough to answer thoroughly ✓ Complex enough to develop the answer over the space of a report ✓ Relevant to the funding agency ✓ Flexible and adaptable enough to be modified as unforeseen constraints require ✓ Aligned to the evaluation objective(s) and logic model. ✓ Broadly experienced in 1-4 overarching questions with potential subquestions, if desired/necessary. ✓ Driving the remainder of the evaluation plan, including the study design, methods, and data collection.

Component Overview	Checklist for Fully Addressing Standards
<p>Study Design</p> <p>Your study design serves as the plan for executing your evaluation type and approach, as identified in the section above. It should address the overall strategy and integrate the different components of the study in a coherent and logical way. Doing so will ensure that you will effectively address the research objective(s). It is a blueprint for data collection, measurement, and analysis of data.</p> <p>The study design should align to the evaluation's purpose (e.g., measuring processes, measuring outcomes, etc.) and should be supported throughout the rest of the evaluation plan.</p> <p>Examples of specific study designs include <i>descriptive study, multiple case study, treatment-group only study, time-series design, pre-post study, explanatory mixed methods designs, correlational, causal, quasi-experimental study, and/or randomized-controlled trial study</i>. The evaluation plan should clearly identify and explain the specific study design, including rationale and limitations. Likewise, some evaluations may call for a phased approach that utilizes more than one design. If so, this component should be delineated by phases with explanations for each phase's design.</p> <p>The study design should be feasible given the resources (e.g., time, funding, personnel, etc.) provided.</p>	<p>The proposed study strategy should do the following:</p> <ul style="list-style-type: none"> ✓ Be appropriate for meeting the identified evaluation objective, type, and approach. ✓ Provide a convincing argument for different features of the design. ✓ Align to the remainder of the evaluation plan. ✓ Be clearly defined and supportive of descriptive/observational, correlational, or causal objectives. ✓ Provide enough rigor for the purpose of the study and ability to lead to the measurement of identified outcomes. ✓ Identify limitations of the design and implications for interpreting its findings.

Component Overview	Checklist for Fully Addressing Standards
<p>Evaluation Measures</p> <p>Data collected using appropriate evaluation measures will tell you how well your program activities have met your expected program outputs and outcomes. Informed by both the logic model and evaluation questions, evaluation measures, or indicators, help guide the selection of data collection methods and the content of data collection instruments. Qualitative or quantitative data may inform these measures.</p> <p>This component should comprise of a table matrix that aligns the evaluation measures to the activities and/or outcomes they are designed to assess. The table matrix should clearly align all of the components of the table and address validity, as well. The evaluation plan should also include a paragraph explaining the table, including brief descriptions of the categories or types of measures.</p> <p>Measures associated with program inputs include such things as organizational characteristics, staffing structures, and service delivery supports. Measures associated with contextual factors and implementation outputs include such things as content developed; quantity or intensity of the services provided; quality and delivery mode of intervention; quantity of participants reached.</p> <p>When evaluating <i>program implementation fidelity or program process</i>, quantitative measures reflect performance and success against predetermined goals and SMART (specific, measurable, achievable, relevant, and time-bound) outcomes. When conducting <i>developmental evaluation</i>, measures act as a tracking mechanism allowing outcomes to quickly emerge and can change throughout the evaluation as the process unfolds. When conducting <i>outcome evaluations</i>, measures should assess whether the program is achieving the expected changes in the short, intermediate, and long term (if feasible).</p> <p>Qualitative measures can also provide valuable information relevant to all types of evaluations and can include such things as program challenges, perceived barriers to success, shared vision, communication, program leadership, and organizational structure.</p>	<ul style="list-style-type: none"> ✓ At a minimum, measures must address the outcomes identified in Exhibit 1. ✓ Measures should be displayed in a table matrix that aligns the activities and/or outcomes with each measure, as well as explanations for the validity of the measures. ✓ Measures can be developed for activities (process indicators) and/or for outcomes (outcome indicators). ✓ There can be more than one measure for each activity or outcome. ✓ The measure must be focused and must measure an important dimension of the activity or outcome. ✓ The measure must be clear and specific in terms of what it will measure. ✓ The change determined by the measure should represent progress toward implementing the activity or achieving the outcome. ✓ Include an explanatory paragraph describing the contents of the table matrix.

Exhibit 1. Required Outcomes for SCC2 to Be Addressed by Both Single Institution and Consortium Grantees

Capacity-Building Outcomes	
Capacity-Building Outcome #1	<ul style="list-style-type: none"> ✓ Must develop capacity-building outcomes and outcomes targets specific to the grant project. <p><i>Each capacity-building outcome:</i></p> <ul style="list-style-type: none"> ✓ Must be tied to a career pathway program to be built or enhanced using SCC grant funds. ✓ Must be tied to the Core Elements (Advancing Equity, Accelerated Career Pathways, Results-driven Project Design, and Sustainable Systems Change) ✓ May address individual, interpersonal, institutional, and/or systemic-level outcomes ✓ Must be connected to positive workforce outcomes. ✓ Must incorporate and/or reflect: <ul style="list-style-type: none"> ○ Outcome statement ○ Type/direction of change (e.g., increase, decrease) ○ Unit of measurement ○ Outcome target ○ Current state or baseline ○ Specific grant-funded program(s) of study ○ Target population ○ Definition(s) that demonstrate(s) or explain(s) when the project achieves the outcome target ○ Timeframe ✓ Must describe the evidence-based rationale connecting the key aspect capacity building, logic model, and equity goals ✓ Must be represented in the logic model
Capacity-Building Outcome #2	
Capacity-Building Outcome #3	
Equity Outcomes	
Equity Outcome #1	<ul style="list-style-type: none"> ✓ Must develop equity outcomes and outcomes targets specific to the grant project. <p><i>Each equity outcome:</i></p> <ul style="list-style-type: none"> ✓ Must be grounded in previously-administered equity gap analysis ✓ May address different aspects of the same identified primary equity gap or address separate equity gaps ✓ Must be connected to specific sectoral or occupational workforce shortage ✓ Must be aligned with a career pathway approach to address worker demand ✓ May address individual, interpersonal, institutional, and/or systemic-level outcomes

<p><i>Equity Outcome #2</i></p>	<ul style="list-style-type: none"> ✓ Must be connected to positive workforce outcomes ✓ Must incorporate and/or reflect: <ul style="list-style-type: none"> ○ Outcome statement ○ Type/direction of change (e.g., increase, decrease) ○ Unit of measurement ○ Outcome target ○ Current state or baseline ○ Specific grant-funded program(s) of study ○ Target population ○ Definition(s) that demonstrate(s) or explain(s) when the project achieves the outcome target ○ Timeframe ○ Description of how the increased equity will be sustained ✓ Must describe the evidence-based rationale connecting the key aspect to the equity gap analysis, logic model, its contribution to target populations' improved employment outcomes, and capacity-building goals ✓ Must be represented in the logic model
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Component Overview	Checklist for Fully Addressing Standards
<p>Data Sources and Data Collection</p> <p>Driven by the evaluation questions, the logic model, and evaluation measures, this component should clearly identify and provide a high-level description of all proposed data sources. When examining the same or similar measures across multiple data sources, the data should be triangulated, or compared, to reinforce the finding.</p> <p>Your evaluation measures may be informed using new data, which involves primary data collection (e.g., surveys, interviews), or existing data which involves secondary data collection (e.g., administrative data, program data). Your chosen data collection methods should consider both the 1) feasibility of collecting the data (e.g., evaluation resources, timeliness of data collection), 2) utility (e.g., data collection frequency vs. point in time, data credibility), 3) propriety (e.g., characteristics of respondents, degree of intrusion to participants, other ethical issues) and 4) accuracy (nature of the issue, sensitivity of the issue, respondent knowledge).</p> <p>Provide a high-level description of preliminary data collection activities and secondary data sources, including those under development as a function of the study design or approach. The description should include the purpose/use of the data, anticipated methods, and potential limitations. Provide any additional information related to data sharing agreements, either secured or in process, or data acquisition concerns.</p> <p>Include in the Appendix of the evaluation plan a table matrix or data crosswalk aligning the data sources to the evaluation questions, measures, and outputs/outcomes, as well as anticipated timeline or timing of collection, where feasible.</p>	<ul style="list-style-type: none"> ✓ Describe preliminary data collection and secondary data availability at a high-level. <ul style="list-style-type: none"> ○ Consider feasibility, utility, propriety, and accuracy ○ Describe the strengths and weaknesses of each data source. ✓ Describe how data collection reflects sound and systematic methods of producing reliable data considering the following: <ul style="list-style-type: none"> ○ Interview methods and recording practices ○ Quality assurance practices (e.g., recording interviews, review of notes by second interviewer) ○ Pending IRB approvals and/or data sharing agreements ○ Areas of potential bias (e.g., onsite interviews of program staff) ○ Provide the intended sample or participants ✓ Describe limitations associated with data sources or data collection and implications for findings. ✓ Include a Data Crosswalk or Table Matrix in the Appendix that displays the alignment of the data sources to the evaluation questions, measures, outputs/outcomes, and timing.

Component Overview		Checklist for Fully Addressing Standards
Sampling Strategy <p>Sampling is the process of selecting units (e.g., people, organizations) from a population of interest to yield the most relevant information with potential for generalization, if feasible. Since it is often impossible and not practical to enroll the entire population in your study, your evaluation may include more than one sample and can occur at multiple levels (e.g., evaluation sites, stakeholders selected for interviews, participants selected for survey). Choosing a 'correct' sample means making sure that your sample is large enough and representative of the population.</p> <p>Given the early stages of program design and implementation, it may be likely that the evaluation cannot yet determine the potential sample size or type. In that case, the evaluation plan should include proposed sampling criteria with estimated sample sizes, noting that they may alter based on implementation. However, the evaluation plan should include descriptions of the site(s) in which the program will be implemented and sample will be drawn, such as community college departments, faculty, and/or work-based partners.</p> <p>Sampling methods include:</p>		<ul style="list-style-type: none"> ✓ Explain and justify the rationale for site selection strategy by describing the following: <ul style="list-style-type: none"> ○ Design and methods used for selecting sites included in the study ○ The criteria and rationale used in site selection ○ Limitations of site selection ✓ Clearly define and defend methods/strategies for drawing samples from data sources by describing the following: <ul style="list-style-type: none"> ○ The method/criteria for selecting a sample of respondents ○ The method for identifying most appropriate respondents for qualitative research ○ Potential for missing observations and implications for the findings ○ Potential recruitment challenges anticipated ○ Note whether different samples will be drawn for different data sources/collection activities, and why
Probability	Non-Probability	
Simple random sampling	Quota sampling	
Stratified random sampling	Purposeful sampling	
Cluster sampling	Systematic sampling	
Multistage random samples	Convenience sampling	
Systematic random sampling	Snowball sampling	
	Volunteer sampling	

Component Overview	Checklist for Fully Addressing Standards
<p>Proposed Analyses</p> <p>This component should include your <i>proposed</i> analysis plan for the evaluation type and study design. While detailed models are not necessary, the evaluation plan should include descriptions of the approach and methods for conducting any quantitative and/or qualitative analyses and their alignment to the evaluation questions.</p> <p>Quantitative analysis descriptions should include potential approaches (e.g., ANOVAs, descriptive statistics, regressions, etc.), including a rationale and limitations for the approaches. Where possible, include the anticipated software to be used to conduct the analyses.</p> <p>Qualitative analysis descriptions should include how coding schemes will be developed, the coding process, strategies for ensuring reliability, and identification of themes. Potential examples of analytic approaches including <i>content analysis</i>, <i>thematic analysis</i>, <i>discourse analysis</i>, etc.</p>	<ul style="list-style-type: none"> ✓ Describe all analysis methods (quantitative, qualitative, mixed methods), including the use of analytic software. ✓ Describe any statistical approaches proposed to analyze quantitative data. ✓ As appropriate, provide multiple and/or alternative perspectives and/or triangulation processes. ✓ Demonstrate how the plan will apply consistent and systematic coding processes across data sources. ✓ Describe how the evaluator will develop a coding scheme, coding process, and theme identification strategy. ✓ Ensure alignment with evaluation questions and study design, as well as measures.

Component Overview	Checklist for Fully Addressing Standards
<p>Appendices</p> <p>To ensure completeness of the plan, as well as conciseness of the narrative, each plan should include a series of appendices to expand on the written plan.</p> <p>Appendix A: This appendix should include the data crosswalk matrix aligning the data sources/collection activities to the evaluation questions, evaluation measures, and outputs/outcomes, as well as high-level timing.</p> <p>Appendix B: This appendix should include an evaluation implementation timeline intending to broadly explain the overall timing of the evaluation, including data collection activities and interim and final reports.</p> <p>Appendix C: (Optional) Any other related documents</p>	<ul style="list-style-type: none"> ✓ Matrices are clear and concise for ease of reading and alignment ✓ Evaluation timeline provides a broad overview of major evaluation milestones, including interim and final reports, as well as data collection activities.

Appendix A:
Data Matrix Template

Evaluation Questions	Activities	Indicators/Evaluation Measures	Data Sources/Data Collection
<p><i>Example:</i> To what extent is the program team meeting its intended outcomes?</p>	<ul style="list-style-type: none"> Developing a workforce partnership board using shared leadership Weekly meetings with employer partners in X region 	<ul style="list-style-type: none"> Number of active regional employers on the board Number of board members representing different employer types 	<ul style="list-style-type: none"> Project-level documents including attendance records

Component Overview	Checklist for Fully Addressing Standards
<p>Logic Model</p> <p>The logic model should graphically represent the evaluaned program and show the intended relationship between the program's inputs (Resources and Strategies and Activities) and the expected results (Outputs and Short- and Long-term Outcomes). Long-term impacts should also be included on the far-right, though will not likely be assessed in the evaluation plan. The logic model should explain how access to and application of resources and strategies will result in a program that reaches the intended target participants <i>and</i>, when these populations are reached by the program, how unmet needs will be met and circumstances will change.</p> <p>The logic model should display the focus or purpose of the evaluation. If the intended evaluation is a <i>process</i> or <i>implementation</i> evaluation, the logic model should include the specific inputs, activities, outputs, and short-term outcomes associated with implementation of the program. This could include examining the relationship between activities, including sequencing, dosage, and timing, as well as how the activities link to outputs and short-term outcomes.</p> <p>A logic model for an <i>outcome evaluation</i> should incorporate all the logic model components for the program with alignment to the short- and long-term outcomes. Outcomes should be feasible and measurable.</p> <p>If the intended evaluation is a <i>developmental evaluation</i>, a theory of change may be better suited for the program depending on its current design and implementation status. The graphic should highlight an evidence-based pathway between the program's context, goals, strategies, and activities as they relate to the desired results of your program but are subject to change as the program evolves.</p>	<ul style="list-style-type: none"> ✓ Include a brief narrative introducing/explaining the logic model and its alignment across the components. ✓ <i>Problem identification</i> or the issue your program is intended to address or the gap it will fill ✓ <i>Inputs</i> are the resources, personnel, materials, technologies, and other factors that must be in place to implement the program's strategies. This should include SCC grant funding. ✓ <i>Strategies and activities</i> that are designed to achieve outcomes, with important consideration to sequence and order of activities, clustering of activities, and dosage ✓ <i>Outputs</i> or what is done or directly results from activities (data can capture size and scope, describe or count strategies and activities such as participation rates, the number of orientations held, number of materials developed, etc.) ✓ <i>Outcomes</i> or what the implementation of resources, strategies and activities is expected to have on participants. <ul style="list-style-type: none"> ○ Short-term outcomes are most immediate and measurable and can be attributed to strategies and activities. These are typically observable and measurable changes in <i>skills, attitudes, and knowledge</i>. ○ Long-term outcomes are more distant, though anticipated, results of participation in strategies and activities. These are typically observable and measurable changes in <i>behavior and decision-making</i>. ○ Impacts are the outcomes of long-term implementation of strategies and activities and may be affected by conditions beyond the program's scope of strategies. These are typically broader in scope and include changes in <i>status, life conditions, systems, and/or policies</i>.

Appendix C

Project Work Plan for *Pathways to Nursing Success (PNS)*

CAPACITY-BUILDING OUTCOMES #1-3				
Capacity-Building Outcome Statement #1: Increase the capacity of the consortium colleges to provide comprehensive student supports to address barriers commonly found among rural students with low socioeconomic status, particularly African Americans, veterans and men.				
ACTIVITIES	ENTITY(IES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES	
Hire and onboard a full-time project manager	WVUP	Signed employment contract with project manager	By Year 1, Month 1	
Hire and onboard nurse faculty (1.5 FTE at each college)	Each college's dean of nursing	Signed employment contracts	By Year 1, Month 3	
Host kickoff meeting with staff to review the contract with DOL, discuss expectations, develop any new policies or procedures needed to enhance the existing project management infrastructure for managing other federal grant awards, and review all data that needs to be collected	WVUP, project manager, project coordinators	Meeting agenda	In Year 1, Month 1	
Develop new partnerships with community-based organizations that can provide additional supports to students, e.g., community health centers, nonprofit organizations, etc.	PNS college advisory board staffed by the project manager with representation from all colleges' nursing faculty, project coordinators, nursing program staff	Referrals	Beginning Year 1, Month 1 and continuing throughout the grant period	
Hire and onboard ASCEND academic advisors	BV and Southern's human resources departments	Signed employment contract with ASCEND academic advisors	Beginning in Year 1, Month 2 throughout the grant period	

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Replicate the ASaP program (rebranded as ASCEND); provide training to student services staff, ASCEND advisors, and nursing faculty on the overall goals of the program; and develop policies and procedures outlining student expectations and parameters of the ASCEND program	BV and Southern (with guidance from WVUP's existing ASCEND advisors)	ASCEND manual; work with students through the ASCEND program	Beginning in Year 1, Month 3 throughout the grant period
Hire and onboard a nurse retention specialist	All colleges' human resources departments	Signed employment contract with the nurse retention specialists	By Year 1, Month 4
Assess incoming nursing students' skill levels, aptitudes, abilities and competencies and their integrated participant services, supportive service, and employment needs to inform the work the ASCEND advisor will provide	All colleges' ASCEND advisors	Student records	Throughout the grant period, as students enroll in a nursing program
Provide each nursing student with job development, job search and placement assistance and, where appropriate, academic and career counseling	All colleges' ASCEND advisors, colleges' adult education departments and workforce development partners	Student records	Throughout the grant period
Provide case management services to each nursing student to address their specific barriers to retention	All colleges' nursing retention specialists	Student records	Throughout the grant period
Provide veteran-specific advising to help them obtain financial and supportive services; and increase access to credit for prior learning through military training	PNS college advisory board; BV's veterans advisor	Credit for non-credit courses, student records	Beginning Year 1, Month 1 and continuing throughout the grant period
Milestones: 1) All project-related staff are hired; 2) All students in the consortium colleges' RN programs are offered individualized advising and case management services to aid in retention			
Deliverables: 1) New partnership agreements with community-based organizations; 2) ASCEND manual that contains program policies and procedures; and 3) Assessment tool for students' skills, aptitudes, abilities and competencies			

Appendix C

Capacity-Building Outcome Statement #2: Accelerate the consortium colleges' nursing programs and increase the transferability of credits earned across the consortium colleges.				
ACTIVITIES	ENTITY(ES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES	
Enroll students in the traditional RN program	All colleges' nursing programs	Student records of admission and enrollment	By Year 1, Month 1	
Form a nursing sector strategy group that meets monthly for partnering employers to inform the colleges about their hiring needs, provide input into the curriculum, and suggest modifications to the program that will better address employers' needs	Project manager, project coordinators, partnering employers, workforce development boards	Minutes of sector strategy group meetings	By Year 1, Month 3	
Enroll students in the accelerated LPN to RN programs	All colleges' nursing programs	Student records of admission and enrollment	By Year 1, Month 1	
Offer the LPN to RN bridge programs in an online format	BV and Southern's deans of nursing, nursing faculty	Online curriculum	During 2023-2024 academic year	
Establish new partnerships and strengthen existing partnerships with employers who commit to releasing their staff nurses to serve as clinical adjuncts to the consortium's nursing students	Project manager, all colleges, employer partners (WVU Medicine, Marietta Health, Charleston Area Medical Center)	Increased availability for clinicals	By Year 1, Month 10	
Align all three colleges' LPN to RN and weekend RN programs to facilitate credit transfer across the consortium	All colleges' deans of nursing	Aligned curricula	WVUP is working on implementation of the BV pilot program for fall 2022 to be ready Day 1 of the grant award. Southern will adopt curriculum by the end of Year 1	

Appendix C

Develop and implement articulation agreements with colleges, universities, and other education and training partners that allow for recognition of course credits in exchange for the education and/or training provided through PNS	BV and Southern articulate to WVUP for a BSN	New articulation agreements	By Year 2, Month 6
License the LPN to RN bridge program as Creative Commons Attribution 4.0 (CC BY)	All colleges' deans of nursing	Creative Commons licensure	By Year 1, Month 10
Milestones: 1) Students are enrolled in one of the consortium colleges' nursing degree programs; 2) The nursing sector strategy group is actively involved in improving PNS			
Deliverables: 1) The LPN to RN curriculum has been streamlined across all consortium colleges and is available online; 2) The LPN to RN bridge program is licensed for other colleges to freely use; 3) New partnership agreements with employers are established; and 4) New college/university articulation agreements are in place			
Capacity-Building Outcome Statement #3: Increase the consortium colleges' nursing faculty's ability to use teaching strategies related to active learning so the curriculum emphasizes scenarios where students learn the clinical judgment skills they will need as RNs.			
ACTIVITIES	ENTITY(ES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES
Analyze the results of the two focus groups of BV students about the quality of its nursing program and faculty's teaching methods – findings are expected to be available in May 2022	BV to analyze data and share it with WVUP and Southern	Report of focus group findings	By Year 1, Month 2
Provide professional development opportunities for faculty and adjunct instructors to enable them to become proficient at active learning methods, including technology-enabled learning, and to create an active and engaging learning experience for students	PNS college advisory board	Training schedule	Beginning in Year 1, Month 2 throughout the grant period
Modify all course syllabi in the nursing programs to incorporate active learning methods, e.g., journaling about course material, paired activities where students actively work through problems together,	PNS college advisory board	Syllabi changes	By Year 1, Month 10

small-group activities to role-play clinical situations they will encounter, simulated practice, etc.			
Collaborate across the consortium to learn how each faculty member is using active learning in their nursing programs by observing each other's classrooms	All colleges' nursing faculty	Syllabi changes	Monthly throughout the grant period
Milestones: 1) All nursing faculty are effectively using active learning techniques in their classrooms			
Deliverables: 1) Course syllabi			
EQUITY OUTCOMES #1 AND #2			
Equity Outcome Statement #1: Consortium colleges will enact new policies and practices to increase opportunities for all students across institutions and nursing programs based on the results of each college's DEI evaluation conducted through an equity lens.			
ACTIVITIES	ENTITY(ES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES
Form DEI oversight board with representation from executive-level leaders, the dean of nursing, nursing faculty, advisors, staff and students from each college	PNS college advisory board	Schedule and agenda for meetings	Meets monthly beginning in Year 1, Month 2 throughout the grant period
Collect and analyze institutional data to assess student inequities and identify gaps in student success, and to inform the development of interventions, policies and practices to improve equity (e.g., using the Office of Community College Research and Leadership's comprehensive local needs assessment tool, conducting DEI-related climate surveys of students and faculty, administrators and staff to learn their perspectives about equity gaps related to access to academic support, opportunities for career guidance, access to needed courses, faculty academic support and	All colleges' project coordinators, members of the DEI oversight board	All baseline data assembled in a tool developed with the third-party evaluator	By Year 1, Month 8

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accommodation to diverse learning needs, access to wraparound services that promote retention, students' comfort expressing points of views, belief that the institution supports DEI, course materials that reflect DEI, job placement outcomes, etc.)			
Engage project staff or faculty in facilitated professional development with internal or external subject matter experts about how to promote DEI in their classroom (e.g., active learning simulations that teach students how to deliver culturally-competent care) and across the college	PNS college advisory board	Schedule of professional development	Beginning in Year 1, Month 2 throughout the grant period
Modify or create colleges' DEI policies and practices to promote equity, enroll more students from marginalized populations and provide them with the support they need to be successful without diminishing the rigor of the nursing programs or contributing to a lower graduate NCLEX-RN pass rate among the colleges' nursing graduates	PNS college advisory board	New or enhanced policies; new or enhanced practices	Beginning in Year 1, Month 2 throughout the grant period
Milestones: 1) DEI oversight board is actively meeting to improve the consortium colleges' capacity to promote equitable student outcomes; 2) Staff and faculty are more aware of how they can advance DEI in their work; and 3) Colleges are actively modifying their institutional policies and practices to promote DEI			
Deliverables: 1) Colleges' adopted policies that are intended to promote DEI			
Equity Outcome Statement #2: Increase the enrollment and retention of underserved students in the consortium colleges' nursing program, e.g., males, veterans and BIPOC students.			
ACTIVITIES	ENTITY(ES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES
Conduct intentional outreach to reach African Americans in WV that have inequitable access to higher education so they learn about the colleges' nursing programs and the support available through	Project manager and project coordinators	Schedule of outreach events	Beginning in Year 1, Month 2 throughout the grant period

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PNS, e.g., outreach to nonprofit agencies that serve African American communities, such as HOPE Community Development Cooperation, Educational Alliance, Cabell County Technical Center, Goodwill Industries and Workforce WV; and partner with nonprofit organizations to attend career fairs, college fairs and other community events, e.g., West Side Community Health Fair, MultiFest and Black Women's Business Owners Expo			
Outreach to men by using Perkins funding to ensure that high school students who come for campus visits explore a career in nursing	Project coordinators	Schedule of outreach events	Quarterly throughout the grant period
Design marketing materials that feature people of color and men as nurses to encourage those subgroups of students to consider a career in nursing	Project manager	Brochures, social media posts	Design materials by Year 1, Month 3; ongoing distribution of brochures and social media posts throughout the grant period
Outreach visits to colleges' courses that are predominantly male, e.g., welding, manufacturing, agribusiness, to share information about the nursing program, as well as the regional demand for and mean salary of RNs	Project coordinators	Schedule of outreach events	Quarterly throughout the grant period
Reach out to companies in male-dominated industries that have laid off workers, e.g., coal mining, to provide information about careers in nursing	Project coordinators	Schedule of outreach events	Quarterly throughout the grant period
Reach out to veterans by partnering with colleges' AmeriCorps veterans staff, Yellow Ribbon programs, Vet "Stand Down" events; and partnering with the Calhoun/Gilmer Career and Technical Center and Huntington VA Hospital	Project coordinators	Schedule of outreach events	Quarterly throughout the grant period

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Coordinate with workforce development centers to access timely labor market information about regional demand for RNs in WV and employers that are recruiting nurses or need additional training to upskill their incumbent workers	Project manager, project coordinators, ASCEND advisors, nursing retention specialist	Meetings scheduled	Quarterly throughout the grant period
Partner with colleges' adult education departments and workforce development partners to deliver test preparation for the TEAS-VII and HESI A2 for students applying for the colleges' nursing programs	Workforce development partners	Test preparation/ bootcamp schedule	Every fall, spring and summer during the grant proposal
Milestones: 1) New outreach practices result in increased interest in nursing among African Americans, men and veterans, as evidenced by requests for information about enrolling in the colleges' nursing programs			
Deliverables: 1) Marketing materials featuring people who are not well-represented in nursing; 2) Labor market information depicted in easy-to-understand materials that underscore that becoming an RN can lift West Virginians out of poverty; and 3) Admissions test-prep bootcamp curricula			
THIRD-PARTY EVALUATION			
ACTIVITIES	ENTITY(IES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES
Procure third-party evaluator	WVUP	Signed contract with evaluator	By Year 1, Month 6
Submit 1 st draft of the detailed implementation evaluation plan to DOL	Project manager and third-party evaluator	Evaluation plan draft	By Year 1, Month 6
Submit revised draft of the detailed implementation evaluation plan to DOL	Project manager and third-party evaluator	Evaluation plan that reflects DOL's input	By Year 1, Month 9
Develop a tool for use across the consortium to document enrollment into the nursing pathway and determine the student-level data it will use to evaluate PNS	Third-party evaluator	Participant tracking tool	By Year 1, Month 2
Establish common definitions, tools and systems to track the outcomes of individual members of the cohort so students' retention and completion rate can	Third-party evaluator	Evaluation manual for colleges' project coordinators	By Year 1, Month 2

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be disaggregated based on various student characteristics			
Collect all data required as required by the DOL-approved final evaluation plan	Project coordinators and other college staff, as needed	Data uploaded to the progress report tool to be developed by the third-party evaluator	Beginning in Year 1, Month 6 and ongoing through project's conclusion
Analyze data to answer PNS' preliminary research questions: 1) How well do the colleges' current admissions criteria predict student success? 2) Are particular courses or student learning outcomes within courses critical to students' ability to continue along the nursing pathway but predictive of student attrition? (These questions will be revised with the support of the third-party evaluator.)	Third-party evaluator	Interim evaluation reports	Year 1, Month 12; Year 2, Month 12; Year 3, Month 12
Review collected data, identify ways to strengthen the project, and share those findings with the nursing faculty and ASCEND team at their respective colleges	Project manager, project coordinators, third-party project evaluator	Interim evaluation reports	Year 1, Month 12; Year 2, Month 12; Year 3, Month 12
Submit the interim implementation evaluation report to WVUP's federal project officer and program office	Third-party evaluator and project manager	Interim evaluation report submitted	By Year 3, Month 3
Submit the final implementation evaluation report to WVUP's federal project officer and program office	Third-party evaluator and project manager	Final evaluation report submitted	By Year 4, Month 12
Submit all required reports to DOL, e.g., quarterly financial reports, WIOA primary indicators of performance and quarterly progress reports	Third-party evaluator and project manager	Electronic submission of all reports	As required by DOL
Participate in any evaluation activities undertaken by DOL, as directed	Project manager	Make records available; provide access to records or any other documents requested to program staff, participants	As required by DOL

<p>Milestones: 1) A third-party evaluator has been procured through a competitive RFP process; 2) DOL has approved PNS' implementation evaluation plan; 3) Common definitions, tools and systems to track the outcomes are agreed upon; and 4) All data required to conduct the DOL-approved evaluation is collected and analyzed at required intervals</p> <p>Deliverables: 1) Draft and revised drafts of PNS' implementation evaluation plan; 2) The tool used across the consortium to document enrollment into the nursing pathway; 3) DOL-required evaluation reports; and 4) DOL-required financial reports</p>			
PARTICIPANT COHORT TRACKING			
ACTIVITIES	ENTITY(IES) RESPONSIBLE	OUTPUTS	TIMELINE/DUE DATES
Develop and adopt standard definitions for a common set of reporting elements for students enrolled in the nursing degree program	Project manager, program coordinators, third-party evaluator	Detailed evaluation plan	By Year 1, Month 3
Develop tracking tools that will allow the colleges and the third-party evaluator to disaggregate student data by their assigned cohort (the group of students that will progress through the nursing degree pathway together)	Project manager, program coordinators, third-party evaluator	Detailed evaluation plan	By Year 1, Month 3
Explore developing and using a tech-enabled mechanism to collect ongoing feedback from employers and job seekers about the quality of the training program, how well the training program meets the needs of employers and participants, and any necessary updates to the education and program training throughout the project	Project manager in consultation with the third-party evaluator that is selected to provide evaluation services for PNS	Decision about whether or not this tool is appropriate for PNS	By Year 1, Month 12
Convene effective and regular external and internal communications among consortium partners	Project manager, project coordinators	Project manager's notes	Beginning in Year 1, Month 2 and continuing throughout the grant period
Provide data analysis resources to identify the impact of PNS on disaggregated student subpopulations	Project manager, project coordinators, WV Community and Technical College System	Progress reports	Beginning in Year 1, Month 2 and continuing throughout the grant period

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Integrate data on nursing students into their college's SIS system and the statewide data system at WV Community and Technical College System	Project manager, WV Community and Technical College System	Data reports	Beginning in Year 1, Month 2 and continuing throughout the grant period
Integrate data on nursing students' NCLEX-RN exam outcomes (the industry-recognized credential) into the common set of institutionwide reporting elements	WV Community and Technical College System	Data reports	Each semester through each college's institutional research department
Milestones: 1) The consortium colleges have and are using all of the tools needed to accurately identify the impact of PNS on student outcomes, including student subpopulations			
Deliverables: 1) Standard definitions are documented; 2) Tracking tools for disaggregated student outcomes; 3) Tech-enabled mechanism to collect ongoing feedback from employers and job seekers, if it is determined to be feasible			

Appendix D

Performance Outcomes Table for *Pathways to Nursing Success (PNS)*

CAPACITY BUILDING OUTCOME #1
Capacity-Building Outcome Statement 1: Increase the capacity of the consortium colleges to provide comprehensive student supports to address barriers commonly found among rural students with low socioeconomic status, particularly African Americans, veterans and men
Type or Direction of Change: Increase
Unit of Measurement: Retention and completion data
Outcome Target: At least 70% of the students who enroll in the nursing program will be retained and will complete their AAS in nursing degree.
Current State/Other Baseline: WVUP's students have had great success since the college began offering the ASCEND program. In the first year, 90% of ASCEND students were retained from fall 2020 to spring 2021, compared with 68.5% of the non-ASCEND student comparison group, and 68% of ASCEND students were retained into spring 2022 (second semester of the second year), as compared with 31% of the non-ASCEND student comparison group. Additionally, ASCEND students are attempting more credit hours (24 in Year 1) and completing more credit hours (20.47 in Year 1), which is three more credit hours per academic year than the non-ASCEND comparison group. Those numbers increased in the cohort's second year, with the ASCEND students attempting more than nine additional credit hours and earning more than six additional credit hours. The ASCEND students beginning in the second year of the program achieved similar results, with 89.6% of the ASCEND students being retained into the spring, compared with 57.69% of non-ASCEND students, and the annually projected number of attempted and earned credits for ASCEND students being 28 and 21, respectively. During the first year of the grant period, BV and Southern will begin offering ASCEND to its nursing students with the goal of increasing their retention and completion in the LPN to RN bridge program and their traditional RN programs.
Grant-funded Program(s) of Study: AAS in nursing
Target Population(s): All students enrolled in a nursing program at WVUP, BV and Southern, as well as pre-nursing students
Definition(s): "Comprehensive student supports" means replicating the evidence-based Accelerated Study in Associate Programs (ASAP) developed by The City University of New York (CUNY); "low socioeconomic status" means Pell-grant-eligible students.
Timeframe: Students will be able to participate in ASCEND for the entire length of the nursing program.
How Sustained: The colleges anticipate that they will be able to sustain the ASCEND program with the increase in tuition/fees that results from less student attrition (currently 40% of all nursing students leave after the first year). Funding for the PNS coordinator position will also be shifted to the colleges' institutional budgets for the same reason. The colleges anticipate that the tuition waivers included in ASCEND will be difficult to sustain without continued fundraising.
Rationale: The ASAP model, with its comprehensive student supports (advising, free transportation cards, textbooks, tuition/fee scholarships, scheduling options to help students with obligations outside of school, classes with their cohort, career advising, help with time management, test-taking strategies, notetaking), has demonstrated its ability to help students with low socioeconomic status graduate with an associate degree. Eight years after random assignment in the CUNY study, 55% of ASAP students had graduated with a two-year or four-

year college degree, versus 44% of control group students. ¹ The Ohio study found a 16% increase in college graduation rates (35% of the treatment group had graduated, versus 19% of the control group), and students with remedial education needs also saw a 16% increase in graduation. ²
CAPACITY BUILDING OUTCOME #2
Capacity-Building Outcome Statement 2: Accelerate the consortium colleges' nursing programs and increase the transferability of credits earned across the consortium colleges
Type or Direction of Change: Increase
Unit of Measurement: Curricular changes; student time to completion
Outcome Target: Enrollment at the consortium colleges' nursing programs will increase by 10 students per year; 70% of students who are accepted into any of the consortium colleges' nursing programs will complete their degree; 70% of those who graduate from the traditional nursing program will pass the NCLEX-RN; 70% of those who graduate from one of the colleges' LPN to RN bridge programs will pass the NCLEX-RN; and 20% of students who graduate from BV's and Southern's nursing program will enroll in WVUP's BSN program to continue along the nursing career pathway.
Current State/Other Baseline: Currently, there are 80 students enrolled in the nursing programs at each of the three consortium colleges annually. Of those students, 10 are enrolled in the LPN to RN bridge programs. The current completion rate of graduates of the colleges' traditional nursing programs is 40% at BV, 66% at WVUP and 75% at Southern, and for the LPN to RN program at BV, it is 50% (WVUP's first cohort is in its second semester). The current NCLEX-RN pass rate of the consortium's traditional nursing graduates is 86%, and the NCLEX-RN pass rate of the consortium's LPN to RN program was 86% at BV in 2020. Currently, 65% of BV's nursing graduates continue their career pathway to earn a BSN, and 10% get an MSN (Southern does not collect this data).
Grant-funded Program(s) of Study: AAS in nursing
Target Population(s): All students enrolled in a nursing program at WVUP, BV and Southern
Definition(s): "Accelerate" means reducing the time to complete an AAS in nursing by one semester.
Timeframe: WVUP, BV and Southern will offer an accelerated RN program in Year 1.
How Sustained: Once the programs are accelerated, the consortium colleges will continue to offer them as created unless student data during the course of the grant period or beyond shows that graduates' rate of passing the national licensure exam (NCLEX-RN) is decreasing.
Rationale: A meta-analysis that included seven research studies involving 1,159 traditional students and 576 accelerated students revealed strong evidence that students entering BSN courses as accelerated students have attrition and success outcomes similar to or better than those of traditional students. ³ Another study's findings showed a statistically significant difference in NCLEX-RN pass rates between accelerated and traditional prelicensure nursing students, corroborating previous research demonstrating higher NCLEX-RN pass rates among

¹ Azurdia, G., & Galkin, K. (2020). *An eight-year cost analysis from a randomized controlled trial of CUNY's Accelerated Study in Associate Programs*. New York, NY: MDRC.

² Miller, C., Headlam, C., Manno, M., & Cullinan, D. (2020). *Increasing community college graduation rates with a proven model: Three-year results from the Accelerated Study in Associate Programs (ASAP) Ohio Demonstration*. New York, NY: MDRC.

³ Payne, L.K., & Mullen, P. Outcome measures for traditional and accelerated nursing graduates: An integrative literature review. *Nurs Educ Perspect.* 2014; 35:238–43.

students in accelerated nursing programs.⁴ NCLEX-RN first-time test-taker pass/fail rates were categorized into two groups (traditional and accelerated prelicensure students) and analyzed to determine if there was a difference in pass rates between these two groups. From the surveys, a total of 1,906 students took the NCLEX-RN exam between 2011 and 2014. The accelerated programs had a total of 588 students, while the traditional programs had a total of 1,318 students; 553 of the accelerated students passed the exam, along with 1,130 students from traditional programs. The traditional prelicensure student group thus had a pass rate of 85.7% (fail rate of 14.3%), while the accelerated group had a pass rate of 94.0% (fail rate of 6.1%). Analysis found a statistically significant difference in the pass rates ($p=.0001$) of the accelerated and traditional students.⁵

CAPACITY BUILDING OUTCOME #3

Capacity-Building Outcome Statement 3: Increase the consortium colleges' nursing faculty's ability to use teaching strategies related to active learning so the curriculum emphasizes scenarios where students learn the clinical judgment skills they will need as RNs.

Type or Direction of Change: Increase

Unit of Measurement: Employer feedback about students' performance in their clinicals; graduates' NCLEX-RN pass rate

Outcome Target: 75% of employers will report that the students in the consortium colleges' nursing programs (LPN to RN program and traditional program) are well prepared for the work and clinical judgment required during their clinicals; 75% of students who are interviewed or participate in focus groups will report that their faculty promote active learning; 80% of students who are interviewed or participate in focus groups will report that they feel prepared for their clinicals and to pass the NCLEX-RN licensure exam; 80% of those who graduated from the traditional nursing program will pass the NCLEX-RN; 80% of those who graduated from one of the colleges' LPN to RN bridge programs will pass the NCLEX-RN. WVUP collects information from all employers 6 months after they graduate using a Likert scale, and its estimated level of achievement is that students will receive an average of 3.0 out of 4 on each question of the employer survey. That last cohort's average score was 3.33/4.

Current State/Other Baseline: BV conducted student focus groups in April 2022, and preliminary findings show that faculty at BV are not promoting active learning. Southern and WVUP's faculty are beginning to use active teaching methods (simulation goggles, flipped classrooms). None of the colleges have examined the next-generation questions asked on the NCLEX-RN and revamped their teaching methods to ensure students have the opportunity to acquire the new clinical judgment skills that they must master to pass the exam and obtain their RN license. The current NCLEX-RN pass rate of the consortium's traditional nursing graduates is 86%, and the NCLEX-RN pass rate of the consortium's LPN to RN program is 86% (86% at BV in 2020 and 0% at WVUP because no students tested).

Grant-funded Program(s) of Study: AAS in nursing

Target Population(s): All students enrolled in a nursing program at WVUP, BV and Southern

⁴ Penprase, B., & Koczara, S. (2009). Understanding the experiences of accelerated second-degree nursing students and graduates: A review of the literature. *The Journal of Continuing Education in Nursing* 40: 74-78.

⁵ Wehner, L. (2021). Comparison of NCLEX-RN Pass Rates between Accelerated and Traditional Prelicensure BSN Programs. *Int J Nurs Health Care Res* 04:1234. DOI: 10.29011/2688-9501.101234

Definition(s): “Active learning” means using tools and/or teaching methods that require students to become active participants in the learning process and demonstrate mastery of specific learning outcomes, e.g., interactive case studies, learning games, sharing stories about clinical experiences, paired/grouped activities, using a flipped classroom model in which lectures are recorded and students watch/listen to them outside of the classroom and use classroom time to practice nursing skills and apply knowledge related to caring for patients.
Timeframe: All colleges will deliver professional development to build their faculty’s capacity to use active teaching methods in Year 1.
How Sustained: Once faculty are using active teaching, they will continue to use it unless research confirms that there is a better way to help nursing students gain the skills and knowledge that employers’ need.
Rationale: A meta-analysis of 225 studies that reported data on examination scores among students in STEM courses under traditional lecturing versus active learning shows the positive impact of active learning on student learning outcomes. In that meta-analysis, student performance on examinations increased by 0.47 standard deviation (SD) under active learning (n=158 studies), and the odds ratio for failing was 1.95 under traditional lecturing (n=67 studies). These results indicate that average examination scores improved by 6% in active learning sections and that students in classes with traditional lecturing were 1.5 times as likely to fail as students in classes with active learning. ⁶
EQUITY OUTCOME #1
Equity Outcome Statement 1: Consortium colleges will enact new policies and practices to increase opportunities for all students across their institution and nursing program based on the results of each college’s DEI evaluation conducted through an equity lens.
Type or Direction of Change: Improved
Unit of Measurement: Demonstration of each college’s executive-level, faculty and administrative staff’s support for equity work that results in concrete changes at an institutional level, e.g., number of policies and practices adopted/changed with the intended outcome of promoting equity; number of meetings of the DEI oversight board and attendance at those meetings; number of recommendations made by the DEI oversight board
Outcome Target: Colleges will make measurable progress in terms of their inclusiveness and equity; colleges will expand their criteria for enrollment to promote more equitable access to historically underserved candidates who are interested in enrolling in their nursing program; students admitted to the nursing program through a less competitive admissions process will have comparable completion and NCLEX-RN pass rates.
Current State/Other Baseline: Low enrollment of students of color and men in the consortium colleges’ nursing programs. The colleges experience high rates of attrition in the first year.
Grant-funded Program(s) of Study: AAS in nursing
Target Population(s): All students enrolled in a nursing program at WVUP, BV and Southern
Definition(s): “DEI” means diversity, equity and inclusion.
Timeframe: The proposed DEI work will occur throughout all 4 years.
How Sustained: Once the equity-focused policies and practices become institutionalized, they are unlikely to be revoked until new evidence emerges that could improve them.

⁶ Freeman, S., Eddy, S., McDonough, M., Smith, M., Okoroafor, N., Jordt, H., & Wenderoth, M. (2014). PNAS; 111(23), 8410–8415.

Rationale: Undertaking multi-pronged activities that show institutions' commitment to diversity can reduce equity gaps. For example, at the University at Albany, Black and Hispanic students now graduate at similar rates as white students after the university took concrete steps to develop a more inclusive climate. ⁷
EQUITY OUTCOME #2
Equity Outcome Statement 2: Increase the enrollment and retention of underserved students in the consortium colleges' nursing program, e.g., males, veterans and BIPOC students.
Type or Direction of Change: Increase
Unit of Measurement: Student-level data on enrollment, retention and completion disaggregated by race, gender and military status
Outcome Target: Increase the number of students who are underrepresented as RNs in the consortium colleges' nursing programs by conducting intentional outreach to encourage more men, veterans and African Americans to enroll in their nursing programs; the colleges' rate of retention and completion will be the same for white, female students as it is for veterans, African Americans and/or male students.
Current State/Other Baseline: Of the 279 pre-nursing students at BV, 9% are BIPOC (14 African American). At BV, the conversion of pre-nursing students of color to students of color pursuing an AAS shows attrition (13 BIPOC students, 6% [6 are African American]).
Grant-funded Program(s) of Study: AAS in nursing
Target Population(s): All students enrolled in a nursing program at WVUP, BV and Southern
Definition(s): "BIPOC" means Black, Indigenous, people of color.
Timeframe: Colleges' efforts to promote inclusivity will be measurable in the fall 2023 cohort of nursing students and will continue throughout and beyond the grant period.
How Sustained: Once the equity-focused policies and practices to promote enrollment become institutionalized, the DEI oversight board, which includes cabinet-level leaders from each college, will require that those policies and practices are regularly reviewed and audited to ensure they are being used.
Rationale: Undertaking multi-pronged activities that show institutions' commitment to diversity can reduce equity gaps. For example, at the University at Albany, Black and Hispanic students now graduate at similar rates as white students after the university took concrete steps to develop a more inclusive climate. ⁸

⁷ U.S. Department of Education Office of Planning, Evaluation and Policy Development. (2016). *Advancing diversity and inclusion in higher education*. <https://www2.ed.gov/rschstat/research/pubs/advancing-diversity-inclusion.pdf>

⁸ U.S. Department of Education Office of Planning, Evaluation and Policy Development. (2016). *Advancing diversity and inclusion in higher education*. <https://www2.ed.gov/rschstat/research/pubs/advancing-diversity-inclusion.pdf>