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REQUEST FOR PROPOSALS

Request for proposals for the evaluation of the Learning Spaces program.

Date of Issue: February 16, 2018

Questions Due: March 2, 2018

Answers Sent: March 9, 2018

Proposal Due: March 16, 2018, 5:00pm EST

Funded by:

Ralph C. Wilson, Jr. Foundation

Contact:

IFF

Attn: Learning Spaces RFP
3011 West Grand Boulevard
Suite 1715
Detroit, MI 48202

EvaluationRFP@iff.org

313.309.7825

<https://www.iff.org/opportunities-new/>

Please do not contact Foundation staff with specific questions regarding the proposal. All communication regarding the RFP, including clarifications, questions, etc. should be directed to IFF.

Request for Proposals for Learning Spaces Program Evaluation

IFF is seeking proposals from experienced and qualified firms or individuals for an evaluation of the Learning Spaces program. Learning Spaces is a program, administered by IFF, designed to increase capacity and improve access to quality early care and education in Southeast Michigan. The program provides technical assistance, consulting services, and grants to early childhood education providers to improve facility quality. The evaluation team will work with IFF to inform the implementation and ongoing development of the Learning Spaces program and identify and measure the program's impact in order to support the replication of the program in other markets by other organizations. The evaluation will start in May 2018 with a final report expected at the end of 2019.

About IFF

IFF is a nonprofit regional Community Development Financial Institution (CDFI) that provides flexible facilities and equipment financing and undertakes real estate development and research on behalf of the nonprofit sector. To date, IFF has provided in excess of \$620-million of financing through more than 1,330 loans in the Midwest supporting \$1.7-billion in project costs through its lending program. IFF's Real Estate Solutions group has undertaken more than 550 projects including scores of ECE related projects and led the construction and development of 24 family resource centers. IFF leverages deep expertise in real estate development, facilities planning, finance, and sector specific knowledge to support transformational community development. IFF's nationwide research focuses on early childhood education (ECE) and K to 12 systems needs assessments.

About Learning Spaces

Between 2015 and 2016, IFF received over \$1 million from the Kresge Foundation to establish and expand the Learning Spaces program. This grant was designed to complement various Detroit ECE quality efforts that elevate early childhood services to children and families. Through this grant, IFF offered early childhood providers direct access to funding for equipment, emergency repairs, and building improvements alongside direct real estate consulting support and customized technical assistance. Cumulatively to date, IFF has committed \$330,000 to 15 ECE providers and is on track to support the preservation and/or expansion of 882 high-quality ECE slots.

Learning Spaces is a program designed to increase capacity and improve access to quality early care and education in Southeast Michigan. Providers can receive technical assistance, consulting services, and grants to improve facility quality. Learning Spaces is entering its third cycle in Spring 2018 and expanding from Detroit to the Tri-county region based on previous research conducted by IFF. Between eighteen and twenty-five grants will be awarded to providers in 2018 and 2019.

In 2015, through funding provided by the Community Foundation of Southeast Michigan in conjunction with The Kresge Foundation, Colina Foundation, and the W.K. Kellogg Foundation, IFF updated and completed a regional ECE needs assessment to identify communities in the Tri-county region with the greatest need for quality child care slots. The study, [*Building a Better System: The Need for Early Childhood Education in the City of Detroit, Macomb, Oakland, and Out Wayne Counties*](#), revealed that of the 128,742 children in need of child care in Macomb, Oakland, and Out-Wayne counties (not including Detroit), 68% (87,686) had access to a licensed facility or home. This left a gap of 41,056 children in need of child care. A large majority (62%) was concentrated in 13 community areas, with need spread across

all program types including general care, subsidy eligible access, Head Start, Early Head Start, and the Great Start Readiness Program.

In order to address the needs of families in these communities, IFF, with funding from the Ralph C. Wilson, Jr. Foundation, expanded the Learning Spaces grant program to these areas. Learning Spaces is designed to initiate systems change for community based ECE providers in Macomb, Oakland, and Out-Wayne counties. The overall goal is to highlight for community based ECE providers the importance of aligning programming and facility quality. Many community based providers find it difficult to achieve beyond the minimum quality standards as they are focused on maintaining curriculum and classroom standards. In addition, providers often have limited financial capacity to address immediate facility issues or engage in a visioning process to prepare long-term plans.

The primary objectives of Learning Spaces include the following:

- Reduce the facility burden of small-scale providers by providing funds to address emergency repairs.
- Provide a safe and healthy learning environment for children by addressing building and life safety code violations in small-scale ECE spaces.
- Increase funding for childcare programming or other services by working with providers to relocate, consolidate, or open new locations and helping to eliminate operating inefficiencies and reduce occupancy costs.
- Support small-scale model facility projects that demonstrate quality childcare design.

Learning Spaces will provide micro-grants up to \$50,000 (about 15 expected) and macro-grants up to \$200,000 (about 3 expected) to support facility stabilization and improvements. Under the micro-grant program, Learning Spaces will assist with capacity building of smaller, community based ECE providers, including home-based family providers. Providers will have the opportunity to access grant funding to purchase equipment, complete small-scale improvements, and address emergency repairs. For micro-grants, Learning Spaces will provide one-on-one technical assistance with the application process coupled with a thoughtful strategy for applying grant dollars to facility improvements. In some cases, Learning Spaces will assist with outlining a phased approach to meeting long-term facility improvement needs. Macro-grants will support larger scale renovation and/or construction work, including relocating or consolidating centers to address facility conditions as well as opening new centers to meet market demand and enrollment targets. For macro-grants, Learning Spaces will support strategic facilities planning work with providers to implement recommendations related to facility relocations, consolidations, or new access points.

In addition to the grants, Learning Spaces will organize two workshops to each community as a way to encourage providers to increase their Great Start to Quality rating, inform them of the Learning Spaces grants and IFF's work, and discuss the importance of facility quality. Grant recipients will receive four customized technical assistance sessions that provide education and training to help ECE providers understand that facilities improvements directly improve retention, shape ECE provider marketing efforts, and can catalyze improvements in programmatic quality. A final component of the Learning Spaces program will be a tour of a high-quality provider in a high-quality facility to demonstrate to grantees the value and importance of the environment in which they offer their services.

The targeted beneficiaries of Learning Spaces are licensed community based centers and home based ECE providers (for profit and nonprofit) who have achieved three stars or higher in the Great Start to Quality rating system. Direct grants will be awarded to ECE providers in Macomb, Oakland, and Out- Wayne counties with an emphasis on prioritizing providers who operate near or border the highest need neighborhoods in the Tri-county region, outside of Detroit. For the macro-grants, Learning Spaces will prioritize projects based on the ability to leverage multiple funding sources in order to have the greatest impact on children and families served.

For more information about Learning Spaces, see <https://www.iff.org/learningspaces/>.

Evaluation Scope

The purpose of this evaluation is to inform the implementation and ongoing development of the Learning Spaces program as well as inform the replication of the program in other areas. The evaluation will be used as a management tool to learn what is working and what needs improvement. Therefore, the evaluation design should support real time feedback to ensure IFF is reaching the appropriate providers, offering appropriate training, efficient in the grant process, etc., and to allow for ongoing improvement of the process.

In order to ensure the Learning Spaces program is meeting objectives, the evaluator will also determine and develop impact measures for future assessment. Discussions with the IFF team will inform these outcome measures and appropriate evaluation questions (a draft of which is provided below).

Preliminary Evaluation Questions

Preliminary evaluation questions are provided below. The selected evaluator will work with IFF to refine and finalize the evaluation questions.

- Is Learning Spaces providing appropriate supports to ECE providers in order to increase the quality of their facilities?
- What is and is not working in the grant process?
 - How can IFF improve the grant process for providers and meeting the program's objectives?
 - Are there ways to improve efficiency in the application process, delivering services, implementing grants, etc.?
- Is Learning Spaces meeting its stated objectives?
 - Are providers changing their behavior around facilities and facility quality, i.e. different business practices, saving future repairs, etc.?
 - Are quality programs being associated more with quality facilities?
 - Do providers become ambassadors in their communities around the importance of facility quality?
 - Do children in grantee facilities achieve greater outcomes and have better experiences than previously?
- How have perceptions of the importance of facility quality changed as a result of the program? Have ECE providers changed their budget processes to reflect this shift?

- What are best practices around facility and programmatic quality that arise from the Learning Spaces program that can be replicated by other communities?
- What data should IFF be collecting moving forward to measure the impact of Learning Spaces and support program improvement?

Evaluation Deliverables

- Progress reports (in person or virtually) that include:
 - Overall progress of the evaluation with an updated timeline
 - Program level summaries and any data collected in excel format
 - Report on any visits with providers
 - Thoughts, concerns, suggestions on how the program is progressing at the current stage as well as the evaluation process
 - Upcoming evaluation activities, especially as they require IFF staff involvement
 - Billable activities since the last report including expenses and an updated budget
- A logic model, theory of change, theory of action or other program description that links programmatic activities to outcomes.
- A data collection framework to support ongoing program evaluation and impact measurement.
- A final report and two in-person presentations of the evaluation including recommendations. The final report should address the evaluation questions in the contract scope, provide data on how Learning Spaces met its objectives, and make suggestions on future iterations of similar grant programs.
- Meetings between IFF's Real Estate Services and Early Childhood Education teams may also be necessary to inform the progress of work with grantees.
- Training for staff, as necessary, can take place at IFF's Detroit office or an outside location of the evaluator's choosing.

Evaluation Timeline

The evaluator will be involved from the beginning of the program expansion in May 2018 until the program culminates on September 30, 2019. The focus of the evaluation will be on the approximately 18 grants that will be provided in 2018 and 2019, though analysis of previous grants administered in 2015 and 2016 would be encouraged.

A final report and presentation of the results of the evaluation will due at the end of 2019.

Evaluation Budget

The total budget available for the evaluation is \$300,000. This budget is *all inclusive* for the entire scope of the evaluation (travel, subcontractors, etc.). The contract and funding will be provided by the Ralph C. Wilson, Jr. Foundation.

Submission Requirements

Proposals should be submitted as an electronic PDF copy to EvaluationRFP@iff.org by 5:00 pm EST on March 16, 2018. The format of the proposal should be single-spaced with a minimum 11 point font, and should not exceed ten (10) pages. Contact information should be clearly stated in a cover sheet (*NOTE:*

The cover sheet does not count towards the 10 page limit) and include primary contact person, company name, mailing address, phone number, email address, and website.

Proposals should contain the following information, numbered and ordered as below.

1. Organization Overview
 - A description of the evaluator's/organization's history.
 - Resumes of the principals, project manager(s), and professional staff who would be working directly with IFF. *NOTE: Resumes do not count towards the 10 page limit.*
2. Previous Work
 - A discussion of three evaluation projects completed in the past five (5) years. Include the client, reference contact information, a brief description of the work, and the size and complexity of the project.
 - Projects which focused on process evaluation, grant administration, and early childhood education are of particular interest.
3. Understanding of the ECE Landscape
 - A discussion of the evaluator's knowledge of the early childhood education sector. Knowledge of ECE providers and the landscape of child services in Michigan are particularly welcome.
4. Methodology Approach
 - A detailed description of how the evaluator would address the scope outline in this RFP and a detailed project timeline.
 - This statement should address how the evaluator would provide real-time feedback for IFF, sample questions the evaluation would set out to answer, what the evaluator would need from IFF and providers, and suggestions for measuring impact in the future.
5. Proposed Budget
 - A detailed budget of the costs associated with the evaluation. The budget of \$300,000 is an all-inclusive budget and no additional funds will be provided. All costs incurred for this evaluation should be anticipated and outlined.

Following the proposal submission, interviews will be conducted with selected evaluators. These will take place at the IFF office in Detroit, Michigan during the month of April 2018. This will provide an opportunity to clarify and elaborate their proposal as well as answer questions on their previous process evaluation experience and any work they've done in the early childhood education sector.

Proposal Evaluation Criteria

Proposals will be evaluated and scored on the following criteria.

- Understanding of the scope of work
 - Does the proposal address the goals of evaluation?
 - Would the proposal provide IFF with the tools for a more efficient and beneficial grant process?
- Technical approach
 - Is the proposal feasible?
 - Is the methodology appropriate for the scope of work?
- Qualification and experience of proposed personnel



- Do the personnel have the necessary skills to undertake the work proposed?
- Have the personnel previously provided evaluation of the process and as a management tool?
- Have the personnel worked in or demonstrated knowledge of the early childhood education sector?
- Cultural competence
 - Does the evaluator demonstrate an understanding of the early childhood care education sector?
 - Does the evaluator have the experience/cultural competence to work with diverse community-based programs?
 - Would the evaluator work with the providers with dignity and respect?

Questions

Potential evaluators should submit any questions they have to EvaluationRFP@iff.org by March 2, 2018. IFF will collect these questions and send all answers to those interested on March 9, 2018. Answers will also be posted with the RFP at <https://www.iff.org/opportunities-new/>.

Submission Process and Timeline

February 16, 2018	Request for Proposals released.
March 2, 2018	Deadline to submit questions to EvaluationRFP@iff.org
March 9, 2018	Answers to all questions will be sent to all interested.
March 16, 2018	Deadline to submit proposals in PDF format to EvaluationRFP@iff.org , ATTN: Learning Spaces RFP, by 5:00 PM EST.
April 2018	Interviews with top candidates will be conducted
May 2018	Grant process and evaluations begin

For any questions and to submit your proposal, please contact EvaluationRFP@iff.org.

Learning Spaces 2018-2019 Preliminary Timeline

Macomb County

- Provider Workshop – May 2018
- Accept and Process Applications – June and July 2018
- ECE/RES Visits – July 2018
- Candidate Selection & Grant Agreement – August 2018
- TA Sessions: Transformational Leadership in Managing Change
 - Part 1 – September 2018
 - Part 2 – October 2018
- RES Completes IEQ – October 2018
- TA Sessions: IEQ
 - Part 1 – November 2018
 - Part 2 – December 2018
- IFF TA and Consulting, Finalize Scope – December and January 2018
- Facility Work Completed – February to April 2019
- Cohort Facility Tour – May 2019

Oakland County

- Provider Workshop – May 2018
- Accept and Process Applications – June and July 2018
- ECE/RES Visits – July 2018
- Candidate Selection & Grant Agreement – August 2018
- TA Sessions: Transformational Leadership in Managing Change
 - Part 1 – September 2018
 - Part 2 – October 2018
- RES Completes IEQ – October 2018
- TA Sessions: IEQ
 - Part 1 – November 2018
 - Part 2 – December 2018
- IFF TA and Consulting, Finalize Scope – December and January 2018
- Facility Work Completed – February to April 2019
- Cohort Facility Tour – May 2019

Out-Wayne County

- Provider Workshop – October 2018
- Accept and Process Applications – November and December 2018
- ECE/RES Visits – December 2018
- Candidate Selection & Grant Agreement – January 2019
- TA Sessions: Transformational Leadership in Managing Change
 - Part 1 – February 2019
 - Part 2 – March 2019
- RES Completes IEQ – March 2019
- TA Sessions: IEQ
 - Part 1 – April 2019
 - Part 2 – May 2019
- IFF TA and Consulting, Finalize Scope – June and July 2019
- Facility Work Completed – July to August 2019
- Cohort Facility Tour – September 2019

Thank you to all who submitted questions regarding the Learning Spaces Evaluation RFP. Below is an edited and distilled list of the questions we received along with the answers. Following the Q&A you will find documents attached to provide more information about the Learning Spaces program – an updated timeline including the evaluation, a document that highlights two previous Learning Space grantees, the grant application form for the current Learning Spaces cycle, assessment surveys completed by providers and IFF staff, and standard terms and conditions from the Ralph C. Wilson, Jr. Foundation. We look forward to your submissions to EvaluationRFP@iff.org on March 16th, 2018 by 5:00pm EST.

- *What is IFF's role in the Learning Spaces program?*

All aspects of the Learning Spaces program are implemented by IFF staff. Monica Duncan, IFF's Director of Early Childhood Services, works most closely with the grantees. Monica oversees the Learning Spaces program, meets with the grantees, and conducts workshops. Monica has support from other IFF staff including Real Estate Solutions (RES) and Research and Evaluation.

- *Can you describe the components of the Learning Spaces program in more detail?*

The Learning Spaces program is designed to help providers improve the quality of their learning environments, increase awareness of the importance of aligning programmatic quality with facility quality, and honor the hard work and dedication of early childhood education (ECE) providers through financial investment. The Learning Spaces program consists of five components:

 - **Introductory Workshops:** The workshops lay the foundation of understanding about leadership in ECE, elements of facility quality and to set the course for identifying the facility projects. They also encourage local providers to increase their Great Start to Quality (GSQ) rating and discuss the importance of facility quality. IFF uses these two workshops (in each county, for a total of six) as a platform to connect with potential grantees and to create further awareness of the role of quality in both programs and facilities.
 - **Grant Program:** Learning Spaces offers micro-grants of up to \$50,000 and macro-grants of up to \$200,000.
 - **Technical Assistance Sessions:** Grantees will receive four technical assistance sessions (in each county, for a total of 12) that provide education and training to help ECE providers understand that facilities improvements directly improve retention, shape ECE provider marketing efforts, and can catalyze improvements in programmatic quality. They will also serve as a way for providers to connect and interact with each other and find support in the local community.
 - **Individual Technical Assistance or Consulting Services:** All grantees will receive individual technical assistance or consulting from IFF's ECE and RES staff to discuss and plan the best use of grant funding. For micro-grants, IFF staff will provide assistance with the application process coupled with a thoughtful strategy for applying grant dollars to facility improvements. In some cases staff will assist with outlining a phased approach to meeting long-term facility improvement needs. For macro-grants, IFF staff will support strategic facilities planning work with grantees to implement recommendations related to facility relocations, consolidations, or new access points. IFF works with providers to finalize the scope of work to be completed and select the best contractor for the project.
 - **Facility Tour:** A final component at the end of the Learning Spaces program will be a tour of other Learning Spaces grantees in their cohort (all the grantees from a county) to view the completed facility improvements.

- *What is the current grant management process for Learning Spaces?*
 Introductory workshops are provided to inform local providers about the Learning Spaces program and to discuss the importance of facility quality. Interested providers will then submit their proposals, which are reviewed by IFF staff. When grantees are chosen, an IFF team of ECE and RES staff will visit provider site(s) to assess the facility and make determinations about grant investment and the possible best use of funds. Following these assessments, there is consultation between IFF and providers to develop a plan and scope. Further work with providers takes place through technical assistance sessions and one-on-one support where the improvement plan is finalized and a contractor selected. IFF monitors the progress of facility improvements through the completion of the project with bi-weekly meetings and will become more engaged if contacted by the provider. Upon completion, RES staff inspect the completed work. If the work is not completed as expected, the team interfaces with the provider to inquire if they would like to handle this phase of the process or if they would prefer for IFF to take the lead to get the project completed as expected. Currently, there is no scheduled follow-up after the project is completed.
- *What types of facility improvements have grantees made in the past?*
 Some examples of improvements made by center-based providers are classroom equipment, playground fencing, roof replacement, flooring replacement, HVAC, and lighting upgrades. Some examples of improvements made by home-based providers are egress window and stairs, flooring, paint and lighting, and drywall repair.
- *How does IFF define quality in the Learning Spaces program?*
 For assessment of quality, IFF looks at the provider's Great Start to Quality (GSQ) rating, Michigan's Quality Rating and Improvement System, as well as licensing infractions. When assessing facility quality, as there is only a GSQ single question regarding facilities, IFF will use the facility assessment surveys (see attached).
- *Are grantees incentivized or required to go through a reassessment of their Great Start to Quality rating after implementing changes funded through this grant?*
 No, that is not currently part of the Learning Spaces program.
- *Are there specific aspects of the grant management process that you feel could be improved based on experience from past years?*
 IFF is seeking this evaluation to inform and improve the grant management process. However, through past cycles, one area we recognize that needs improvement is formal documentation of the process, which would help in future changes to the scale and scope.
- *Is the implementation of Learning Spaces structured differently across counties or cycles?*
 The implementation of Learning Spaces is the same across counties and should be considered one program for evaluation purposes. The first Learning Spaces program included similar components, but the model has been updated for the second and third cycles. The second cycle of Learning Spaces is currently in progress.
- *How many grantees do you expect per county?*
 The number of grants made will be based on the quantity and quality of the submissions. However, IFF hopes that there will be dispersed representation across the counties.

- *Can IFF share write-ups or reports on the previous Learning Spaces grantees?*
Please see the attached document that highlights two previous Learning Spaces grantees. Detailed information on all previous grantees will be provided to the selected evaluator. IFF will also work with the selected evaluator to connect with previous grantees, including those currently completing projects, in order to provide context and facilitate learning for the 2018-2019 cycle.
- *What is the purpose of the evaluation and who are the intended audiences?*
The purpose of the Learning Spaces evaluation is to inform IFF of the success of the 2018-2019 cycle of this program and discover areas for improvement. Based on the evaluation findings, IFF may be interested in expanding this program (in size and/or location) in the future. To this end, the evaluation is also expected to highlight the areas of success in the Learning Spaces program that could be transferable/expanded. The evaluation findings will primarily be used internally to improve the Learning Spaces program, but will also be used to inform the community of areas of success.
- *Which Learning Spaces grantees will be included in the evaluation?*
The focus of the evaluation will be on providers in Macomb, Oakland, and Out-Wayne counties. (The attached updated timeline shows that the program in Out-Wayne counties will now be completed in 2019 as well.) While previous Learning Spaces grantees from Detroit (there have been two cycles) are not the focus of the evaluation, these providers are available to inform evaluators and provide programmatic context.
- *Are the preliminary evaluation questions listed on page 4 of the RFP expected to be distilled during the evaluation process?*
Yes. IFF will work with the chosen evaluator to finalize (change, add, or delete) the questions the evaluation will address. The questions listed are used to suggest the topics that we are interested in addressing. IFF would encourage potential evaluators to submit their own suggested questions in their proposal.
- *What are the “program level summaries” referencing under evaluation deliverables?*
The evaluator will be expected to provide summaries of each of the components of the Learning Spaces program. IFF would like to have evaluation findings to inform the implementation of each program activity.
- *What type of training will the evaluator be expected to provide, and for whom?*
IFF is interested in having the selected evaluator provide training to support the implementation of the evaluation recommendations around impact measurement as well as any other topics that the evaluator believes would be beneficial for IFF staff. IFF will work with the selected evaluator to develop these trainings and we welcome the inclusion of suggested trainings in the proposals.
- *What data is currently collected on grantees and will it be provided to the evaluator?*
The evaluator will have access to all data collected including applications, assessments, photographs, and surveys. See the attached grant application and assessment forms for a sample of information collected. IFF will work with the evaluator to collect further data as needed.

- *Is the evaluator expected to attend Learning Spaces program activities?*
 It is necessary for the evaluator to understand and appreciate all aspects of the Learning Spaces program. IFF would expect the evaluator to observe many of Learning Spaces activities, but is open to when and how the attendance would take place.
- *What is the expected interaction between evaluators and grantees? Will grantees be required to participate in the evaluation process?*
 The 2018-2019 Learning Spaces grantees will be required to participate in the evaluation process and work with the selected evaluator. The form of the interaction between the evaluators and grantees is flexible. IFF will work with the evaluator to ensure access to grantees and necessary data.
- *What previous research or evaluation has been conducted on Learning Spaces or the early childhood education system in Southeast Michigan?*
 There have been no previous evaluations of the Learning Spaces program. The previous research that informed the development of the Learning Spaces program ([Building a Better System: The Need for Early Childhood Education in the City of Detroit, Macomb, Oakland, and Out Wayne Counties](#)) was completed by the IFF Research department in 2015. The Research and Evaluation team will be available to discuss this research with the selected evaluator.
- *What is the length/timeline of the evaluation?*
 The evaluation will be conducted from May 2018 to September 2019 with a final report from the evaluator expected at the end of 2019. See the attached updated timelines for further detail.
- *How will IFF be involved in the evaluation?*
 IFF administers the Learning Spaces program and will oversee the evaluation. The selected evaluator will work with staff in IFF's Detroit office who manage the Learning Spaces program, primarily Monica Duncan the Director of Early Childhood Services, as well as IFF's Research and Evaluation team, based in IFF's Chicago office. The Ralph C. Wilson, Jr. Foundation is funding the current cycle of Learning Spaces and the evaluation.
- *To what extent will local/SE Michigan knowledge and experience be prioritized in considering evaluators?*
 Knowledge of the communities served would be valuable to this process, however, IFF does not feel it is essential to the evaluation.
- *Is IFF open to evaluators from out-of-state?*
 IFF is a regional organization with offices throughout the Midwest and has experience working with vendors in different locations. IFF is agnostic to the location of the evaluator as long as the evaluator is available to complete a valuable and comprehensive evaluation, which would include attending the necessary Learning Spaces activities and delivering presentations to IFF staff. Qualified candidates from all locations are encouraged to apply.
- *Do you require IRB approval for the evaluation?*
 No, this project does not require IRB approval.

- *Does the budget narrative and full budget count toward the 10-page limit?*
No, the budget and narrative do not count in the 10-page limit.
- *Can letters of commitment or technical attachments be included in the proposal? If so, are they excluded from the 10-page limit?*
Yes, proposals may include an Appendix with these documents. The Appendix will not be counted in the 10-page limit.
- *If figures/graphics and text boxes are included in the proposal, can they be in a smaller font?*
Yes, as long as they are reasonably legible, proposals may include figures/graphics and text boxes in a smaller font.
- *Can on-going projects be included in the evaluator's previous work?*
Yes, on-going projects may be included in the proposal.
- *Are for-profit organizations eligible for this project?*
Yes, for-profit organizations are eligible to apply; 501(c)(3) status is not required.
- *What type of agreement will be awarded?*
The Ralph C. Wilson, Jr. Foundation (Foundation) anticipates issuing a grant agreement with the Learning Spaces evaluator.
- *Would the resulting agreement include any restrictions on the use of funds?*
The Foundation grant agreement requires the grantee to request in writing and receive advance approval from the Foundation for 1) substantive changes to the program's purposes or activities; 2) line item changes to the budget which amount to more than 10% of the grant award; and 3) extensions of the grant period beyond the end of the grant term. The Foundation has a strict policy that indirect expenses may not exceed 10%. Indirect costs include overhead expenses (e.g., rent and utilities) and general and administrative expenses (e.g., officers' salaries, accounting department costs and personnel department costs). If your organization typically has "fees" or "fringe benefits" that relate directly to the project, please distribute funds into your budget (e.g., cost of personnel working on the evaluation).
- *Is there a preferred budget template or format?*
There is not a preferred budget template. IFF and the Ralph C. Wilson, Jr. Foundation ask that the budget reflects the suggested payment schedule and amounts (e.g. annual payments) and in advance of payments, the Foundation will request an interim grant report that reflects variances in the grant budget vs actual budget.
- *Will the evaluator be paid by deliverable?*
Excluding the first payment, the Foundation will request an interim grant report in advance of payments. The evaluator will not be paid by deliverable, but must demonstrate satisfactory progress to both the Foundation and IFF Learning Spaces teams.
- *Can you provide your standard terms and conditions for review?*
Please see the attached standard terms and conditions from the Ralph C. Wilson, Jr. Foundation.

Preliminary Learning Spaces Timeline w/ Evaluation

February 16, 2018	RFP Issued
March 2, 2018	RFP Questions Due
March 9, 2018	RFP Answers Sent
March 16, 2018	RFP Proposal Due
April 2018	Interviews with Top Candidates
May 2018	Evaluations begin Provider Workshops in Macomb County & Oakland Counties
June & July 2018	Process Applications for Macomb & Oakland Counties
July 2018	ECE and RES Visits to Providers in Macomb & Oakland Counties
August 2018	Providers Chosen and Grant Agreements made in Macomb & Oakland Counties
September 2018	Orientation Session in Macomb & Oakland Counties TA Session TLMC #1 in Macomb County TA Session TLMC #1 in Oakland County
October 2018	TA Session TLMC #2 in Macomb County TA Session TLMC #2 in Oakland County Provider Workshops in Out-Wayne County
November 2018	TA Session IEQ #1 in Macomb County TA Session IEQ #1 in Oakland County RES Completes IEQ in Macomb & Oakland Counties
November & December 2018	Process Applications for Out-Wayne County
December 2018	TA Session IEQ #2 in Macomb County TA Session IEQ #2 in Oakland County ECE and RES Visits to Providers in Out-Wayne County
December 2018 & January 2019	Individual TA and Consulting, Finalize Scope for Macomb & Oakland Counties
January 2019	Providers Chosen and Grant Agreements made in Out-Wayne County
February 2019	Facility Improvements begin in Macomb and Oakland Counties TA Session TLMC #1 in Out-Wayne County
March 2019	Facility Improvements continue in Macomb and Oakland Counties TA Session TLMC #2 in Out-Wayne County RES Completes IEQ in Out-Wayne County
April 2019	Facility Improvements continue in Macomb and Oakland Counties TA Session IEQ #1 in Out-Wayne County
May 2019	Macomb and Oakland Counties Cohort Facility Tours TA Session IEQ #2 in Out-Wayne County
June & July 2019	Individual TA and Consulting, Finalize Scope for Out-Wayne County Facility Improvements begin in Out-Wayne County
August 2019	Facility Improvements continue in Out-Wayne County
September 2019	Out-Wayne County Cohort Facility Tour End of Evaluation of Learning Spaces Program
End of 2019	Report and Presentation of Evaluation Findings



Renovated classrooms, more efficient lighting, upgraded heating/cooling, better security, new playgrounds — these all contribute to high-quality facilities for young children to learn and grow. But tackling facility repairs and renovations can be overwhelming for providers that have few staff, small budgets, and little time to request grant funding. That’s why IFF and The Kresge Foundation teamed up to offer *Learning Spaces* — a grant program that subsidizes facility assessments and helps pay for identified repairs and upgrades that contribute to program quality.

The Learning Spaces grant program increases capacity and improves access to quality early care and education across Detroit. Here are two examples of how the program is making a difference in the lives of children and families.

Case Study #1: Greater Sonora Early Learning Prep



Cynthia Martin first applied to Learning Spaces to acquire some new playground equipment for the 25-year-old early care and education center she runs on the east side of Detroit. But after working with IFF to assess the center and discuss a variety of program needs, IFF and Martin decided to focus investment on indoor lighting.

According to IFF Director of Childhood Services Monica Duncan, indoor lighting is critical to creating a conducive learning environment. Indirect and the use of various types of lighting applications are the best artificial options for creating spaces where

Two innovative approaches

1. **Facility assessments** that support providers in evaluating a broad range of facilities improvements
2. **Grant awards** to help pay for identified repairs and upgrades and plan for future improvements

Year 1 accomplishments

During its first year, Learning Spaces granted \$150,000 to 10 facilities serving a total of 631 children.

Year 2 goals

With renewed funding from The Kresge Foundation, the program is scaling with larger grant awards for more providers – up to \$20,000 in grant support for repairs and upgrades at high-quality early education centers in Detroit and larger grants for extensive improvements to center-based environments.

kids feel comfortable playing and learning. Harsh fluorescent lights can make classrooms feel like hospitals or offices. The use of dimmer switches allow lighting to be adjusted more gradually and naturally as children transition from play time to nap time. These were among the upgrades installed at Early Learning Prep, and the parents noticed right away.

“The best part is the domino effect,” Martin says. “We made these improvements, which we hope leads to better scores and more families served. That, in turn, can lead to increased funding for other improvements.”

Case Study #2: Blessed Beginnings Learning Center



This 5-star rated home-based provider serves Early Head Start children on Detroit’s east side. Owner/director LaShawn Bridges has been running this facility successfully for 18 years, but saving for big-ticket upgrades was difficult with a smaller-scale program of only six participants. Her request to Learning Spaces was straight-forward and, based on the follow-up assessment with IFF, spot-on: Blessed Beginnings wanted to make safety upgrades.

First, a new egress window was installed in the facility. Second, some carpeting was ripped

According to Duncan, one goal of Learning Spaces is to help providers prioritize facility improvements so they can address pressing upgrades as well as realize long-term objectives and program growth.

Early Learning Prep already has a 4-star rating (out of a possible 5 stars) from Michigan’s Great Start to Quality Program. It is a year-round, extended-day program serving approximately 55 children annually.

and patched in many places, causing tripping hazards, so new high-impact flooring was installed. Finally, new lighting helped the facility meet early education best practices.

“Our parents love the changes – they say the places seems not only brighter, but bigger,” Bridges says. “And because the grant paid for these safety changes, we were able to spend some of our savings on playground equipment. The neighborhood park is not always clean or safe, so having a secure place for the kids to play outdoors really means a lot to us.”

See www.iff.org/learningspaces for more information.



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IFF Michigan
3011 W. Grand Blvd., Suite 1715
Detroit, MI 48202
313 309 7825



IFF is an equal opportunity provider.



IFF Learning Spaces Grant Application Form

IFF Learning Spaces is a grant program designed to increase capacity and improve access to quality early care and education across the city of Detroit. Providers can receive technical assistance, consulting services, and grants to improve facility quality.

Providers are eligible if they have a three-star rating or higher in the Great Start to Quality rating system, have no current licensing infractions, have been in operation for a minimum of 2 years, and are interested in improving their program and facility quality.

The grants, ranging from \$5,000 to \$20,000, are designed to increase capacity and improve access to quality learning environments for children. IFF's financial assistance to child care providers is made possible by the generosity of The Kresge Foundation as a part of their Kresge Early Years for Success (KEYS): Detroit initiative.

Please attach the following documents to your application:

- Form W-9
- Great Start to Quality rating documentation
- Current Michigan Department of Human Services license
- Current insurance certificate
- Copy of current property taxes (if applicable)

Nonprofits:

- Most recent Form 990 and/or audit

For-profits:

- Most recent tax return/filing

Completed applications should be sent to learningspaces@iff.org.

Applicant Information

Date: _____ Agency name: _____

Administrative office address: _____

Name and Title (of person completing the application): _____

Phone: _____ Email address: _____

Number of sites: _____ Tax status (circle one): nonprofit for-profit

Enrollment capacity for all sites: _____ Enrollment capacity for project site: _____

Current enrollment for all sites: _____ Current enrollment for project site: _____

Great Start to Quality rating (min. of 3 star rating): _____ Years in business: _____

Project Site Information

Project site address (if different than administrative office): _____

Building type (i.e., school building, standalone, commercial storefront, etc.): _____

Current program/funding sources:

Program Funding Source(s)	Full day	Half day	Full year	Capacity	Enrollment
Early Head Start			Y or N		
Head Start			Y or N		
Great Start Readiness Program			Y or N		
Private pay			Y or N		
State subsidy			Y or N		
Scholarships			Y or N		
Other			Y or N		

Years at current location: _____ Facility owned or leased: _____

If leased, lease expiration date: _____ Renewal options: _____

How long do you plan to stay in this location? _____

What are the facility's general conditions? _____

Are there any potential code/licensing concerns in the building? If so, explain and state if the grant funds would be used to address them.

Funding Request

Brief summary of proposed project/need: _____



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How would this project impact your programming (e.g., increases capacity, provides safer environment, enhances programming)?

Funding Request Amount (up to \$20,000): _____



Illinois

333 South Wabash Ave.
Suite 2800
Chicago, IL 60604
312 629 0060

Indiana

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202 East Market St.
Indianapolis, IN 46204
317 860 6900

Michigan

3011 West Grand Blvd.
Suite 1715
Detroit, MI 48202
313 309 7825

Missouri

911 Washington Ave.
Suite 203
St. Louis, MO 63101
314 588 8840

3105 Gillham Road
Suite 200
Kansas City, MO 64109
816 335 4200

Ohio

500 South Front St.
Suite 125
Columbus, OH 43215
614 484 1811

Wisconsin

215 North Water St.
Suite 225
Milwaukee, WI 53202
414 563 1100

{CENTER/LOCATION} Facility Assessment

Updated 1/10/18

Purpose:	{Contract, Grant, Learning Spaces, Etc.}
Site Name:	{Center Name}
Provider Contact Person:	
Address:	{Full Address}
Year Built:	{Year Built}
Total Leased Area:	{Total Leased Area}
Lease Terms:	{Ask client or get from your PM}
Classrooms/Used:	{Pull the licensing report for capacity information}
Typical Classroom Size:	{Pull from the licensing report or measure}
Students Served/Capacity:	{Ask client for enrollment/licensing report for capacity}
Program:	{HS/EHS, GSRP, Private Pay, Etc.}
Funding:	{Subsidies, Private Pay}

I. PROGRAM AND FACILITY OVERVIEW

{Describe the program and building. Describe; Location and surrounding area, building exterior, building and lot size, building site, building interior, number of classrooms and general floorplan/layout.}

II. KEY FINDINGS

- {Note all high level issues and findings. Life safety, code, unique items, major repairs etc.}

The following report is based upon a site visit conducted by the IFF team on {Month #, 2018} to assess the facility conditions and evaluate the facility based on early childhood education best practices for design. The information outlined below represents the best of IFF’s knowledge regarding observed conditions at the site. Opinions expressed regarding the facility’s conformance to any and all building codes, accessibility rules and regulations, licensing requirements or other standards (Code) are preliminary only. A mark in the



“+” column indicates an acceptable condition with no recommended improvements in the next 5 years. A mark in the “-” column indicates a condition that requires improvement. Information related to the condition is noted in the adjacent comments field.

As a next step, IFF recommends that {CLIENT} engage the services of appropriately licensed professionals to confirm any Code, zoning and licensing issues.

FACILITY SITE AND BUILDING EXTERIOR

A. Building Envelope + - Comments

General Condition			{+/- based on culmination of items below}
Foundation			{Type of foundation and condition}
Walls & Masonry			{Wall construction and condition}
Roof, Gutters, Downspouts			{Roof type and condition}
Exterior Doors			{Exterior Door type and condition}
Exterior Windows			{Window type and condition}
Other			

B. Site Conditions + - Comments

Staff Parking Lot			{Location, condition, # spaces}
Visitor Parking Lot			{Location, condition, # spaces}
Street Parking			{Location and condition}
Trash Enclosure			{Location and condition}
Sidewalks*			{Condition}
Fencing*			{Fence type and condition}
Porches*			{Porch type and condition}
Stairs*			{Location and condition}
Pedestrian Safety			{Dedicated access from parking area}
Pick-up/Drop-off			{Location and safety}
Vehicle Circulation			{Vehicular access to site and circulation}
Exterior Signage			{Signage location and condition}
Other			

* If none exist, indicate as such.



III. FACILITY INFRASTRUCTURE

A. General Interior + - Comments

Flooring			{Flooring types (especially wet and dry classroom areas), and condition}
Walls and Trim			{Wall finishes and condition}
Ceiling			{Ceiling types and condition}
Lighting			{Lighting type, quantity and condition}
Interior Doors and Hardware			{Interior door type, life safety issues and condition}
Window Interiors			{Windows open, size, child height, condition}
Environmental			{Any evidence or signs of mold, asbestos, lead etc.}
Pest Management			{Signs of pests, control plan in place}
Other			

B. Entry Condition + - Comments

Vestibule			{Size, type and condition}
Reception Area			{Dedicated area, size, location}
Remote Entry System			{Buzzer}
Communication System			{Intercom system}
Notification System			{Doorbell}
Other			

C. ADA Accessibility + - Comments

Doors/Entry			{Door size, access, ramp, etc.}
Hardware			{Egress and ADA hardware}
Hallways			{Egress hallway widths and lengths}
Bathrooms			{ADA bathroom}
Drinking Fountains			{Hi/lo drinking fountain}
Elevator/Lift			{ADA access to entire building}
Ramp			{Ramp slope, location and condition}
Other			

D. Kitchen + - Comments

Size			{Kitchen Size}
Type			{Full service, warming, etc.}
Appliances			{Commercial, residential, condition}
Sanitation Equipment			{Dishwasher, three compartment sink}
Garbage Disposals			{Existing, location}



Hand Washing Sink			{Hand sink location and condition}
Dry Storage			{Cabinets, shelves, proper containers}
Storage			{Adequate space}
Ventilation			{Proper cooking ventilation}
Other			

E. Janitors Closet + - Comments

Sink			{Type and condition}
Storage			{Size and location}
Security			{Locked, child access}
Other			

F. Safety & Security + - Comments

Fire Alarm System			{Fire alarm type and condition}
Carbon Monoxide Detectors			{Location}
Sprinkler System			{Type and condition}
Emergency Lighting			{Type, quantity and location}
Strobes			{Type, quantity and location}
Fire Extinguishers			{Type, quantity and location}
Posted Evacuation Plans			{Location}
Exit Signs			{Type, quantity and location}
Security System			{Type and location}
Cameras			{Type of recording, quantity, location}
Access Control			{Intercom and buzzer system}
Railings			{Type, location and condition}
Treads/Risers			{Type, height, location}
Egress			{Locations, path, doors/door hardware as relates to life safety}
Other			

G. Mechanical Systems + - Comments

Heating			{Type, location and condition}
Cooling			{Type, location and condition}
Electrical			{Panel type, size, location, condition, wiring, etc.}
Ventilation			{Adequate ventilation, location}
Plumbing			{Pipe and fixture type, location, quantity, water heater}



Other			
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IV. CENTER LAYOUT

A. Circulation & Adjacencies

+ - Comments

Kitchen			{Location in building, adjacencies}
Bathrooms			{Location in building, adjacencies, quantity}
Administrative			{Location in building, adjacencies}
Janitorial Closet			{Location in building, adjacencies}
Wayfinding			{Interior signage, child friendly}
Other			

V. ADMINISTRATION AND STAFF SUPPORT AREAS

B. Staff Support Areas

+ - Comments

Site Directors Office			{Existing, size, location, adjacencies}
Lounge/Work Room			{Existing, size, location, adjacencies}
Storage			{Size, location, accessibility}
Conference Room			{Existing, size, location, adjacencies}
Meeting Room			{Existing, size, location, adjacencies}
Family Workers Office			{Existing, size, location, adjacencies}
Lactation Room			{Existing, size, location, adjacencies}
Flex Space			{Existing, size, location, adjacencies}
Staff Restrooms			{Existing, size, location, adjacencies}
Laundry Room			{Existing, size, location, adjacencies}
Other			

VI. EDUCATIONAL PROGRAM AREAS

A. Typical Classroom

+ - Comments

Size			{Classroom size}
Storage			{Classroom storage, size, secure, accessible}
Natural Light			{Windows, skylights, size, height}



Sink			{Location and size}
Access to Outdoors			{Direct access to outdoor play area}
Teacher Workspace			{Dedicated workspace, location}
Other			

B. Classroom Layout + - Comments

Separation			{Permanent walls, furniture, curtains, etc.}
Defined Entry Area			
Discovery Play			
Dramatic Play			
Gross Motor Play			
Reading Area			
Quiet Play			
Wet Area			
Sleeping Area			{Clear, safe space, storage for cots}
Eating/Table Area			
Child Accessible Displays			
Wall Displays			
Outlets			{Quantity, safety}
Other			

C. Children's Restroom + - Comments

Size			{Location, quantity and condition}
Changing Areas			{Location, access, visibility}
Child Height Sinks			{Quantity and condition}
Child Height Toilets			{Quantity and condition}
Partitions			{Type and condition}
Supplies			{Accessories availability and adequacy}
Other			

D. Shared Program + - Comments

Gross Motor Room			{Location and adjacencies}
Parent Resource Room			{Location and adjacencies}
Parent Computer Lab			{Location and adjacencies}
Art/Therapy Room			{Location and adjacencies}
Other			

E. Outdoor Play + - Comments

Size			{Size}
------	--	--	--------



Equipment		{Type, condition, size}
Shaded Area		{Amount of shaded area}
Surface		{Grass, asphalt, rubber, wood chips, etc.}
Grading		{Slope, water issues, etc.}
Fencing		{Type, security, height}
Gates		{Type, secured}
Landscaping		{Amount, garden, etc.}
Storage		{Shed, secured, etc.}
Other		

Recommendations:

- {List out recommendations for repairs, professional inspections, code violations, etc.}

Cost estimate:

- {Itemize in line with recommendations, as team may need to select a sub-set of recommendations}

Early Care & Education Indoor Environmental Quality (IEQ) Questionnaire

These questions are designed to capture your thinking about the indoor environment of your facility. If you are applying for IFF's Learning Spaces grant, this can be a tool to help prioritize your project.

1. Does your space feel too hot? Too cold?
2. Can you open the classroom windows? If so, what do you see (e.g. traffic, playground, houses, trees, etc.)?
3. Can children see out of the windows?
4. When the classroom lights are turned off, is there still enough natural light to see?
5. What sounds can you hear when the classroom is empty (e.g. mechanical, fans, traffic)?
6. Are classrooms separated by full-height, permanent walls?
7. Do you have tiled ceilings? What material is the floor made out of? What about the walls?
8. Are all children visible from every location in the classroom?
9. What type of building are you in (e.g. school building, standalone, commercial storefront, etc.)?
10. Do you own or rent?



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Illinois

333 South Wabash Ave.
Suite 2800
Chicago, IL 60604
312 629 0060

Indiana

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202 East Market St.
Indianapolis, IN 46204
317 860 6900

Michigan

3011 West Grand Blvd.
Suite 1715
Detroit, MI 48202
313 309 7825

Minnesota

527 Marquette Ave.
Suite 1150
Minneapolis, MN 55402
612 814 0310

Missouri

911 Washington Ave.
Suite 203
St. Louis, MO 63101
314 588 8840

Ohio

500 South Front St.
Suite 125
Columbus, OH 43215
614 484 1811

Wisconsin

215 North Water St.
Suite 225
Milwaukee, WI 53202
414 563 1100

Facility Improvement Prioritization

The following recommendations are intended to be used as a guide to prioritize necessary repairs and improvements at the _____ Facility. The information outlined below represents the best of IFF’s knowledge regarding observed conditions at the site. Opinions expressed regarding the facility’s conformance to any and all building codes, accessibility rules and regulations, licensing requirements or other standards (Code) are preliminary only.

	(Months)			
Health and Safety (ADA, Hazards, IEQ)	1-6	6-12	12-24	24+
Modify/Repair Existing fire alarm system				
Repair electric meter box				
Install Barrier Free Hardware on all exit doors				

	1-6	6-12	12-24	24+
Interior (Flooring, Lighting, Layout)				
Replace or re-lamp existing light fixtures				
Develop permanent classroom separation				
Create separate entry and reception space				
Add more natural light				
Develop a plan for more storage				

	1-6	6-12	12-24	24+
Exterior (Roof, Parking, Masonry)				
Repair exterior brick				
Repair vinyl fascia/pest proof				
Repair timbers in play area and add mulch				
Add shade to playground area				
Add a dumpster enclosure per CODE				

	1-6	6-12	12-24	24+
Mechanical Systems (HVAC, Plumbing, Elect.)				
Inspect HVAC units for proper function				
Inspect ventilation in bathrooms and kitchen				
Add 3 compartment sink or dishwasher				



Grant Conditions

1. The Grant will be used only [GRANT PURPOSE]. Funds will be expended in accordance with this Grant Agreement and in a manner consistent with the budgets included in the application submitted by Grantee, and will not be expended for any purpose other than the Grant Purpose without the Foundation's prior written approval.
2. This grant is contingent upon the following conditions: No contingencies set.
3. The Grantee represents to the best of its knowledge that no goods or services have been or will be provided to the Foundation or any of the Foundation's Trustees or officers or their family members in connection with the Grant.

Grantee's Certifications

Grantee certifies that

1. as to its tax status, Grantee:
 - a. is a tax-exempt organization as described in Section 501(c)(3) of the Internal Revenue Code of 1986 (the "**Code**") or a governmental entity or political subdivision of the State of STATE;
 - b. has received an IRS determination letter that qualifies it as a public charity under Section 509(a)(1) or (2) of the Code, or Section 509(a)(3) of the Code as a supporting organization (supporting organizations are required to complete and submit the Supporting Organization Attachment);
 - c. has not had notice of a change of its non-private foundation status published by the IRS nor received notice from the IRS that it will be deleted from such status;
 - d. has not, since the date of its determination letter, to the best of its knowledge and belief, changed its basic purposes or the manner of conducting its affairs in any way that might affect the continuation of its tax-exempt or non-private foundation status; and
 - e. knows of no basis on which the organization could be considered to be controlled directly or indirectly by the Foundation.
2. grant funds received from the Foundation shall not be used:
 - a. to influence the outcome of any specific public election, or carry on, directly or indirectly, any voter registration drive (within the meaning of Section 4945(d)(2) of the Code); or

- b. for any purposes other than charitable, scientific, literary, educational, or other purposes described in Section 170(c)(2)(B) of the Code.
3. if the Grantee carries on propaganda, or otherwise attempts to influence legislation (within the meaning of Section 4945(d)(1) of the Code), then either:
 - a. the grant of funds received from the Foundation is a general support grant which has not been earmarked to be used in an attempt to influence legislation; or
 - b. the grant of funds received from the Foundation is a specific project grant (a) which grant has not been earmarked to be used in an attempt to influence legislation and (b) which grant, together with other grants by the Foundation for the same project for the same year, does not exceed the amount budgeted, for the year of the grant, by the Grantee for activities of the project that are not attempts to influence legislation.

Payment and Term

1. Following receipt of this fully executed Agreement and approval of all necessary documentation, payment of this grant will be made as soon as practicable.
2. The term of the grant is from **DATE** to **DATE**. Any funds not expended during this period must be promptly returned to the Foundation unless an extension of the grant period has been approved.
3. If there is a contingency, payment of this grant shall be made within thirty days of the Foundation's receipt of evidence of the contingency having been met by the Grantee.

PAYMENT SCHEDULE

Reporting

1. Reports shall be due to the Foundation as outlined in the schedule below. Please notify the Foundation if the report deadline cannot be met and request an extension.
2. The written report shall include (i) a narrative that provides a detailed description of the activities related to the Grant and their progress relative to their completion as described in the Grant Proposal, for each year, (ii) a summary of the expenditures paid from the Grant to date, (iii) the Grantee's audited Financial Statements and (iv) any changes to the elements of the original Grant Purpose as reflected in the Grant Application.
3. This grant has been assigned the number **GRANT NUMBER**. Please include this number in all future correspondence and reports concerning this grant.

4. The Grantee agrees to maintain and at the request of the Foundation, to make available to the Foundation, books and records adequate to verify actions related to this grant.

All reports and other notices required to be provided under this Grant Agreement may be sent to the attention of:

[PAYMENT SCHEDULE]

Additional Terms and Conditions

1. The Grantee will request in writing and receive advance approval from the Foundation for:
 - a. substantive changes to the program's purposes or activities;
 - b. line item changes to the budget which amount to more than 10% of the grant award;
 - c. extensions of the grant period beyond the end of the grant term.
2. The Grantee agrees to inform the Foundation on a timely basis of any circumstances that could substantially affect the work being supported by the Foundation's grant. Such circumstances would include, but not be limited to, changes in the Grantee's leadership, project staffing, funding or tax-exempt status.
3. The Grantee hereby indemnifies and saves the Foundation and its trustees, officers and committee members harmless from and against all liabilities and expenses (including reasonable attorneys' fees) resulting from (i) the engagement, by employment or as an independent contractor, of personnel, including, without limitation, employment taxes and workers compensation and discrimination claims; and (ii) any injury to persons or property arising in connection with the pursuit of the Grant Purpose.
4. The Foundation may terminate this agreement or withhold payments, or both, if the Grantee becomes unable to carry out the purposes of the grant, ceases to be an appropriate means of accomplishing the purposes of the grant, or fails to meet the terms and conditions of this Agreement. If termination or withholding of payment is being considered by the Foundation, the Grantee will be notified of the non-compliance issues and will have a specified period of time to remediate the non-compliance issues cited by the Foundation. Successful remediation will be determined in the sole discretion of the Foundation.
5. Patriot Act Compliance: Grantee certifies that Foundation funds will be used in compliance with all applicable anti-terrorist financing and asset control laws, regulations, rules and executive orders, including but not limited to, the USA Patriot Act of 2001, as amended, and Executive Order No. 13224, as amended. Furthermore, Grantee agrees to ensure that any Foundation funds, either directly or through a subgrant, will not be disbursed to any organization or individual listed on the United States Government's Terrorist Exclusion List or the Office of Foreign Assets Control (OFAC) Specially Designated Nationals & Blocked

Persons List. In addition, Grantee takes reasonable steps to ensure that its board, staff, subgrantees and volunteers have no dealings whatsoever with known terrorists or terrorist organizations.

6. This Grant Agreement will constitute the full understanding between the parties and will be governed by, and construed in accordance with, the laws of the State of Michigan.

Communication

1. The Foundation and Grantee agree that all public acknowledgement of the Grant will be credited as follows: "Ralph C. Wilson, Jr. Foundation".
2. The Grantee shall obtain advanced written approval of the text of any written public statement on the Grant, press release or other announcement or recognition that references the Grantee and Foundation, it being understood that listing the Grant among other general donor listings shall not require advanced written approval.