Issuance Date: April 30, 2014

Subject: Addendum to Annual Program Statement (APS) #APS-OAA-14-000001

The purpose of this Addendum to the above referenced APS is to post the announcement titled, "CALL FOR PARTNERSHIP CONCEPT NOTES FOR THE ADVANCING MOOCS FOR DEVELOPMENT INITIATIVE" as an addendum to the above referenced APS.

The detailed announcement is as follows:

ANNOUNCEMENT

CALL FOR PARTNERSHIP CONCEPT NOTES FOR THE
ADVANCING MOOCS FOR DEVELOPMENT INITATIVE

UNDER EXISTING ANNUAL PROGRAM STATEMENT APS No.: APS-OAA-14-000001

This program is authorized in accordance with Part 1 of the Foreign Assistance Act of 1961, as amended.

> **PLEASE NOTE:** This is an addendum to an existing announcement. All interested organizations should carefully review both this addendum AND the full announcement, which can be found here: FY 2014/FY 2015 GDA APS. Important information contained in the full worldwide announcement is not repeated in this specific addendum.

Through this Addendum to the 2014 Global Development Alliance (GDA) Annual Program Statement (APS), the Office of Education in the Economic Growth, Education, and Environment Bureau (E3/ED) of the United States Agency for International Development (USAID) is issuing a special call for the submission of Concept Papers focused on advancing the utilization of Massive Open Online Courses (MOOCs) for Development. USAID is particularly interested in advancing the ability of MOOCs to serve as a resource for workforce development.

USAID is launching this call for concept papers to source new ideas and catalyze new partners to co-invest with USAID and its resource partners to address the following objectives:

- **Advance global understanding of MOOC enrollment, completion, and utility in developing or emerging economies.**
- **Improve MOOC service provider offerings to increase the utility of MOOCs for workforce development in target countries.**
- **Increase MOOC enrollment and user rates through advanced marketing of MOOCs.**

The theory of change that underpins these objectives is, if learners have access to and improved utilization of relevant MOOC courses and course bundles, they will improve their knowledge, skills, and abilities leading to new or better employment.

USAID is launching this initiative in partnership with CourseTalk, a leading for-profit MOOC aggregator website. This initiative contemplates adding additional resource partners – either through the on-going efforts of USAID and CourseTalk, or at the initiative of applicants to this solicitation – to possibly include online education platforms, learning management systems, and international marketing firms. These types of partners are hereafter referred to as "resource partners." The alliance will then include these resource partners plus the implementing partner selected through this solicitation.

USAID may direct up to $750,000 to this initiative over the next two years through award to an implementing partner to achieve the objectives of this solicitation. The resource partners will provide an additional $300,000 in cash in support of the objectives in this solicitation, plus an additional $500,000 of in-kind services and support. The total estimates cash resources for this initiative total approximately $1.05 million. This solicitation relates to the cooperative agreement USAID intends to award. Subsequent agreements between the implementing partner and the other resource partners would be handled separately, and are not covered by this solicitation. Once all relationships between the implementing partner and the resource partners are established, USAID anticipates that a memorandum of understanding (MOU) would be signed by all parties to the alliance.

Unless otherwise stated herein, all terms and conditions of the GDA APS FY14 apply.

I.   Problem Statement

Massive Open Online Courses have the potential to extend access to quality education and workforce development training for millions worldwide. Yet, students in the developing world are not accessing these courses in significant numbers, and those that do are already well-educated, well-off, and well-positioned in the job market. While a number of barriers to the full integration of MOOCs in the developing world exist, a fundamental issue of awareness of what is out there and how to navigate it is a critical starting point. Without knowing where to find courses and how to sequence them in ways meaningful to skills acquisition and workforce outcomes, students cannot begin to realize the promise of MOOCs for the developing world.

II.   Background

Since exploding onto the higher education scene in 2012, MOOCs have promised to fundamentally transform education as we know it. Thomas Freidman has written that, "Nothing has more potential to lift more people out of poverty… Nothing has more potential to unlock a billion more brains to solve the world's biggest problems… than massive open online courses." The president of edX, has touted MOOCs as "borderless, gender-blind, race-blind, class-blind, and bank-account blind" challenges to the traditional higher education paradigm.

At their core, MOOCs are simply academic courses. What makes them innovative and potentially game-changing is the "Massive" and "Open" aspects of their approach. MOOCs are truly massive, with most having enrolments in the tens of thousands and many touting enrollment of 100,000+ students. They are also open – anyone can sign up and there are no

admission requirements, costs, or prerequisites.   While some blended approaches are emerging, MOOCs are almost exclusively "online," they consist typically of a mixture of video lectures, packaged readings, chat-discussions, and periodic computer-scored tests. While online education has existed for some time, it was the massive and open nature of these offerings – and names like Harvard, Stanford, and MIT delivering them – that has lit a fire of interest in MOOCs by schools, students, governments, corporations, and development agencies.

The current MOOC landscape consists of several large platforms such as Coursera (a for profit business working with 100 universities, led by Stanford); edX (a non-profit joint venture of Harvard and MIT); Udemy (a business allowing anyone to create courses, offered for free or a small price); among other large providers, and then smaller offerings by individual institutions, with many universities offering a MOOC or two. Courses across these offerings range from core academic subjects such as micro-economics or statistics, to higher level specializations such as neuro-science and robotics; passing interest or arts/culture classes like Greek philosophy and poetry, to short, workforce or skill related courses like "excel spreadsheets for small business owners" or "public speaking and business communication skills."

The promise of MOOCs is that they might democratize higher education, break down historic and well entrenched class and geographical barriers, and tackle woeful higher education access, quality, and relevance outcomes. This will in turn allow people to gain skills that will make them more employable and more productive in their employment or at least more knowledgeable, informed, and connected in the knowledge economy. Stories like that of the [Mongolian 15 year-old](#) who was one of 340 students out of 150,000 to achieve a perfect score on a sophomore level Circuits and Electronics course at MIT, or of the young Bangladeshi woman who escaped servitude, started a business, and then grew is substantially after taking dozens of MOOCs, are oft-cited in articles about the promise of MOOCs to lift education levels in all corners of the world. But are MOOCs delivering on these promises in a deep and meaningful way? Who is taking MOOCs? Where and why?

Recent data from the University of Pennsylvania (Penn) sheds light on these questions.[1] Based on a survey of one million MOOC registrants in 32 courses offered through Coursera, Penn researchers found that MOOC users are:

- <u>Well educated</u>: 83% of users already have post-secondary degrees; 44% have a graduate degree.
- <u>From developed and emerging countries:</u> the top ten countries of origin for users are: U.S., India, Brazil, U.K., Canada, Russia, Spain, China, Germany, and Australia.
- <u>Wealthy</u>: MOOC users come from the wealthiest 6% of their countries' population.
- <u>Young:</u> 40% of MOOC users are under 30.

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[1] Please see the Penn research for further information and important details related to data limitations.
http://www.gse.upenn.edu/pdf/ahead/perna_ruby_boruch_moocs_dec2013.pdf

- <u>Male:</u> Significantly more males (57%) enroll in MOOCs, a percentage that rises to 67% for Brazil, Russia, India, China, and South Africa or the BRICS.
- <u>Employed or Retired:</u> 63% already have jobs; nearly 15% are retired.
- <u>Mostly curious:</u> Penn respondents report enrolling because, (a) they were curious, or just for fun [50%]; and (b) to advance their career [44%].

Based on this research, MOOCs do not yet appear to be reaching the developing world and critical target groups (women, the un-credentialed, and the unemployed) in a significant and pervasive way. Recent writing on using MOOCs for development suggest that – in addition to the significant hurdles of internet access and language of instruction – a reason for under-utilization of MOOCs in lower-income countries might be that young people simply do not know of them; do not know where to start; or question the relevance of this type of education to the labor market.

Once young people know that MOOCs exist and what might be possible through taking them, they are still in need of efficient and effective ways to search the enormous universe of courses and determine which course or sequence of courses is best for them. It is for this reason – making sense of MOOCs – that several MOOC aggregator sites have been launched and are growing. These sites are one-stop shops for searching MOOCs across platforms and providers, similar to searching multiple airlines on a travel aggregator site such as Travelocity or Orbitz.

CourseTalk is the leading MOOC aggregator, sourcing more than 16,000 courses from more than 30 platforms and providing state of the art of search, reviews, and community tools. The site experience more than 200,000 unique visitors a month. CourseTalk describes their site as:

> *The leading search and discovery platform for learners to explore the broadest array of online courses. We connect students with schools, professors, and resources that will help them to succeed and to find the right course from the right source. The site is also an ideal place for professors to get authentic feedback on their online courses and for universities and course providers to reach learners from around the world.*

CourseTalk and USAID believe that awareness of MOOCs and exploration of them by learners will not be sustained if the MOOC experience does not pay off. One of the major drivers in MOOC adoption and retention is the promise of building and enhancing professional skill sets that will lead to new or improved career opportunities. To facilitate this goal, several leading MOOC providers such as edX and Coursera have started to offer mastery or specialization tracks covering high demand topics like Computer Science, Cybersecurity, Android App Development and Supply Chain Management. It is thought that by sequencing course in bundles or curricula, learners will be able to better signal the breadth and depth of their accomplishments via MOOCs.

While still relatively new, MOOCs and MOOC providers, platforms, and aggregators are rapidly changing and improving their approaches. Data still remains spotty, especially in the developing world, as to where, why, what, and how MOOCs might be a meaningful contributor to education and workforce development. This initiative seeks to provide that data and test targeted platform and aggregator changes to advance the field.

III.   Solicitation

USAID is co-financing this initiative with CourseTalk and potential other partners to advance the ability of MOOCs to serve as a resource for workforce development. Through this announcement, USAID seeks an implementing partner from the NGO, college, university, business, or foundation communities to help the alliance (resource partners + implementing partner) achieve the objectives established here-in.

USAID anticipates supporting this program in up to three target counties, however USAID leaves the exact countries and number of them to be determined and justified by applicants. The level of anticipated cash resources for the initiative ($1.15 million) may limit the country level presence to one or two countries, but USAID leaves that determination to the applicant.

As USAID has already established private sector partners that leverage our resources at more than 1:1, this solicitation does not further require applicants to meet or exceed a 1:1 private sector resource contribution threshold, as is typical for solicitations under the GDA APS. However, applicants must explain and will be evaluated on how they would grow the alliance to deepen impact and/or increase scale.

Applicants must describe the approach they will employ to engage and ensure significant and ongoing engagement of and collaboration with the private sector in the development and implementation of the program and activities the applicant proposes in response to this addendum. Applicants must also describe how they expect the private sector engagement and collaboration to increase the reach, efficiency, effectiveness and sustainable outcomes and results of the proposed program activities.

If the applicant does not believe that additional private sector engagement and partnering is appropriate to particular objectives of this addendum and the applicant's proposed program and activities related to those objectives, the applicant must explain why that's the case.

The objectives of this program will become the constituent components of the eventual award's program description and work plan.

Objective 1: Advance understanding of MOOC enrollment, completion, utility in target countries.

Data on a wide-range of MOOC enrollment, usage, and completion metrics for developing country young people is currently inadequate for making confident determinations of how MOOCs may contribute to development. While data does exist on some levels, it currently only captures those that enroll and even that data is limited. Through the collection of high quality baseline data on MOOC usage, this initiative will help online education providers tailor their offerings to address the learning styles and educational outcome requirements of target populations in developing or emerging countries. This data will form the baseline for the project's monitoring and evaluation approach, as well as provide data for the assessment needed to accomplish Objective 2. The resource partners will provide access to the data they collect on their sites' users. The implementing partner will analyze this data, in addition to

primary data they collect in the target countries (including market and survey research), and other sources of data they deem relevant. To the extent possible, data and reporting under this Objective will be made publically available for use by others in improving their approach to MOOCs for development.

Objective 2: Improve MOOC service provider offerings to increase utility of MOOCs for workforce development in partner countries.

The utility of MOOCs for workforce development is a function of students (a) finding the right/relevant courses; (b) succeeding in the courses they take; (c) being able to sequence multiple courses in a way the add up to a larger curriculum or skill set, and (d) achieving something that is valued or recognized in the job market. The goal of this initiative is to provide evaluation tools, learning paths and student support services that will drive higher enrollment and completion rates and develop demonstrable professional skills in target populations. This will be achieved by enhancing the existing CourseTalk platform through improved search functionality and implementation of vocational course sequences. Further, the partnership will cultivate communities or networks that connect potentially isolated but like-minded students who will benefit from the peer effects on student learning. The response of the job market to online courses and vocational tracks is to be determined, but the implementing partner will collect data on the receptivity of the market to such non-traditional qualifications.

The alliance's implementing partner will utilize a Needs Assessment conducted under Objective 1 to advise CourseTalk in developing and refining the site's search functionality for target users. For example, the needs assessment may find that students want to search for courses based on the level of bandwidth or internet connection speed needed to successful participate in a course; or that students would like to search for courses that have been reviewed by others in their particular country or region. Based on the needs assessment and a packaging of such advice, CourseTalk would lead the implementation of site changes through in-kind contributions to the alliance. Likewise, the needs assessment might reveal areas for improvement by online education platforms in the types of courses demanded by the market and/or the way it bundles courses (similar to the "X series" courses offered by edX or "Specializations" offered by Coursera) might be improved. On-line learning platforms that may become a part of the alliance, would then lead changes to their offerings based on this data.

As part of meeting this objective, the implementing partner might forge or build on relationships with professional accreditation bodies (U.S. or target country based), such as the Accreditation Board for Engineering and Technology (ABET) or the American Council on Education. These partnerships could lead to a number of outcomes, such as the accreditation body "blessing" certain MOOCs or MOOC sequences as aligned with the standards of that accrediting organization. The benefits of this approach include signaling to both students and employers the professional value of the aligned courses. Students would then be able to filter the CourseTalk catalog by accreditation alignment to more effectively search the platform.

Objective 3: Increase key target population MOOC enrollment and completion rates through advanced marketing of MOOCs and the formation of communities of users.

Initial research shows low levels of awareness and usage/completion of MOOCs among developing world populations, particularly key demographics, including young people, women, those lacking education credentials, and the un- or under-employed. This program will advance the knowledge and usage/completion of MOOCs by key populations in target countries. A well-structured marketing campaign will drive awareness among target populations of the professional development opportunities available through MOOCs and online education. This initiative will promote the search and discovery functionality of CourseTalk as the means to easily navigate the ever changing universe of online education options. CourseTalk and its partners plan to contribute some in-kind marketing resources to this objective, though the applicant should budget for limited marketing as well.

Beyond enrolling in the appropriate course, the major challenge facing MOOC completion is overcoming the isolating aspect of the online experience. As part of this initiative, the alliance will foster cohorts of online learners that will improve the connection between students globally and facilitate the sharing of new ideas, research, and project work. There is great demand for these communities, as a recent Coursera poll found that 77% of their students are interested in forming study groups to enhance their MOOC learning. In executing this concept, the implementing partner will use baseline and needs assessment data to inform CourseTalk's site improvements, including possibly:

- Discussion Forums: Build online forums on the CourseTalk platform focused on individual classes, professional development and country/region specific learning. Students will be able to engage on a variety of subjects and build a greater connection to learning cohorts.

- Badging & Gamification: CourseTalk has the ability to issue users various points, badges, and missions (e.g. complete a professional development learning track) and community interaction (e.g. mentoring a fellow student). With this CourseTalk can reward positive community building behaviors with these badges that confer expertise and social status onto the student.

- Educational Portfolio: Many of the STEM and fine -arts oriented courses have practical exercises and projects that students may upload to their CourseTalk student profile to showcase their skill set and expertise. Another benefit of the portfolio is to have a repository of course completion certificates across platforms. Through these profiles, the computer programmer in South Africa will be able to display their work and collaborate with a programmer in Indonesia to the mutual benefit of both parties.

The alliance believes that the advancement of the tools listed above will benefit target audiences through increased connection with the global student community and access to resources that will improve completion rates. The implementing partner will be well positioned to advise the alliance on how best to target these site improvements.

Geographic Scope:

Applicants must propose and defend the inclusion of up to three target countries. These countries will ideally be countries that (a) have USAID presence and programs; and (b) have lower levels of traditional MOOC access impediments, such as low-levels of English language, poor internet connectivity, and/or rigid labor markets and academic qualification regimes. See Annex A for data on connectivity and English levels in USAID partner countries.

Monitoring, Evaluation, and Learning Agenda:

Learning: An overarching goal of this initiative is to build the nascent knowledge base on MOOC usage in developing countries and in MOOCs for workforce development. As such, alliance partners – including the implementing partner gained through this solicitation – must be open to sharing key learning and data as a public good, and should identify ways they can make data available to the broader community.

Monitoring & Evaluation: The project's monitoring and evaluation component will be led by the implementing partner. Illustratively, the current alliance partners see it as including three main phases. The initial phase would be the completion of a baseline usage and needs assessment. This study will set a baseline for MOOC access, usage, and completion levels in target countries, key demographics of the target user population and user motivation, interests, and goals. It will also assess the specific needs of the target population with respect to workforce development and higher educational attainment, outlining common key gaps in how target users can or do use MOOCs to achieve those needs. The data collection will be carried out through the website user analytics capabilities provided by the resource partners, select in-person or online surveys (carried about by the implementing partner), and secondary research, as needed and available.

Once the initial phase is completed, the second phase would consist of data collection for monitoring the project's core program activities. This component will be managed by the implementing partner, through input and collaboration with CourseTalk and other partners. A main focus of this phase will be collecting data on core project outputs, including potentially:

- Users: number of users, user retention, course completion rates;
- Usage: motivation, repeat user rate, participation in user communities; and
- Outcomes: change in education attainment; change in employment/income

This data will help guide the project's continuous improvement process and will form the inputs for the final stage of measurement, the final evaluation.

In the final phase, the implementing partner would complete an evaluation for the project, incorporating: (1) baseline study; (2) key project output/outcome data at the endline; and (3) select qualitative user surveys and/or interviews. The goal of the evaluation will focus on assessing the project's impact on key performance indicators.

IV.   Evaluation Criteria

Applications will be evaluated based on the criteria set forth in the GDA APS (Section VI: Concept Paper Evaluation Criteria), subject to the exception noted above that applicants are not required to leverage and mobilize private sector resources on at least a 1:1 basis since USAID has already identified the core resource partners whose contributions will meet that requirement. However, applicants must describe – and will be evaluated on -- the approach they will employ to engage and ensure significant and ongoing engagement of and collaboration with the private sector in the development and implementation of the program. Applicants must also describe how they expect the private sector engagement and collaboration to increase the reach, efficiency, effectiveness and sustainable outcomes and results of the proposed program activities.

USAID recognizes that the knowledge, skills, and abilities needed for a successful alliance may not reside within any one organization. USAID supports organization consortia or alliances (academia, NGO, corporate, financial, foundation, or otherwise) that submit a joint response to this Addendum.

In the context of the Advancing of MOOCs for Development Initiative, USAID and its partners will also consider the following complementary or additional factors in determining whether to pursue a proposed alliance:

Innovation: USAID will prioritize partnership ideas that clearly demonstrate innovation in approach to the objectives laid out above.

Impact: USAID will prioritize alliances that will result in a deeper and/or wider impact of the proposed program.

Engaging Other Partners: USAID will prioritize partnerships that significantly leverage USAID and other resource partner involvement to catalyze involvement and contributions from other partner organizations.

Monitoring, Evaluation, and Learning: USAID prioritizes working with partners that focus on gathering robust data as part of their program design and implementation to inform ongoing monitoring, evaluation, and learning. Preferences will be given to partnership proposals that commit to sharing lessons learned, propose needed metrics, and promote data gathering with the wider development, academic, MOOC communities.

Proposed alliances should be consistent with USAID legal and policy restriction including those set forth in USAID Automated Directives System (ADS) and in the Foreign Assistance Act of 1961.

V.   Application Instructions and Review Process

In collaboration with the existing alliance resource partners, USAID's Office of Education in the Bureau of Economic Growth, Education, and Environment (USAID/E3/ED) will be responsible for proposal review and award management. Applications are required to submit short concept

papers (not to exceed 5 pages) to USAID/E3/ED through Eric Johnson (ericjohnson@usaid.gov). After review by E3/ED and other alliances partners, applicants will receive instructions from E3/ED on whether to proceed with a full application. Concept papers must be submitted by June 30, 2014 in order to be considered.

Applicants wishing to discuss the initiative with CourseTalk, or to seek further information on potential new partners of CourseTalk may contact Matt Webster at CourseTalk (matt@coursetalk.com). If interest becomes too high volume, USAID and CourseTalk will consider holding an open forum for questions, though no such forum is currently planned. Information on such a forum, should it occur, would be posted on grants.gov through a modification to this addendum.

For information regarding guidelines and procedures to submit a concept paper, please refer to the GDA APS which can be found at the following website: http://www.usaid.gov/work-usaid/get-grant-or-contract/opportunities-funding/global-development-alliance-annual-program. Additional information on alliances can be found at http://www.usaid.gov/work-usaid/get-grant-or-contract/opportunities-funding/global-development-alliance-annual-program-0.

Before submitting a Concept Paper, prospective applicants may contact Eric Johnson at ericjohnson@usaid.gov. The USAID Point of Contact can discuss the extent to which a proposed idea is appropriate and aligns with USAID's goals.

In addition, prospective applicants must connect the prospective applicant's private sector partners, if any, to Eric Johnson at ericjohnson@usaid.gov as well. Under the GDA APS, the USAID Point of Contact can have robust and extensive discussions with prospective private sector partners with regard to potential alliance ideas and activities, so long as that partner is not seeking to receive and manage award funding from USAID.[2] Such discussions help foster the co-creation that is core to the Global Development Alliance approach.

USAID reserves the right to fund any or none of the applications submitted.

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[2] Note: If the private sector partner is seeking to receive and manage USAID funding, the discussions will need to be more limited. Questions regarding the nature and scope of partner discussions prior to the submission of a concept paper, as well as any questions regarding the terms of the Global Development Alliance Annual Program Statement, can be directed to gda@usaid.gov or Ken Lee at kenlee@usaid.gov.