21-06-05B RFP College and Career Readiness Materials and Services

2.1.5 College Readiness Software

Proposal for Scope of Work

Submitted by

Student Success Agency

Company Overview

BUSINESS NAME: Student Success Academy LLC

BUSINESS DBA: Student Success Agency

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PHONE: 214 934 8343

WEBSITE: studentsuccess.co

PRIMARY CONTACT

PROPOSAL CONTACT: Michael Benko (Chief Operating Officer and Co-founder)

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PHONE: 214 934 8343

PROPOSER EMAIL: michael@studentsuccess.co

Student Success Agency (SSA) is pleased to present this proposal for college-and-career support services. We have a proven record of using a secure online platform to link students with trained near-peer mentors via texting, phone and/or email. Students receive individualized support to consider post-secondary options, establish goals, develop plans, and to create and track milestone markers on their way to achieving their goals.

COMPANY HISTORY

Our mission at Student Success Agency (SSA) is to maximize the potential and increase the chances of success for secondary school students from underserved communities. We are a national organization dedicated to providing students access to the opportunities and resources they need to succeed beyond high school.

We do this by linking students in grades 8-12 with mentors who are in college or recently graduated from college. We call these mentors "Agents" because they work like agents for writers or athletes, helping students work towards their own vision of success.

Agents and students interact using our secure online platform to explore interests, identify goals, break down the steps involved, set milestones, and check in on progress.

We have been using our secure platform to provide comprehensive, personalized mentoring and tutoring services to students since 2012. In that time, our work has been highlighted in the following places:

- Release of a [Best-Selling Book about planning for college and career success](#) (2012)
- [TEDx appearance](#) for mentoring innovation (2012)
- [Recognition at the White House](#) for innovation in education (2014)
- Cited by [Forbes "30 Under 30"](#) recipients for innovation in education (2017)
- Recognized by [Forbes as a top company](#) to work for (2019)
- Host of American School Counselors Association Counselor of the Year Awards (2020, 2021)
- [Inc. 5000 honoree](#) (2022)

Over just the past three years, our organization has partnered with more than 500 schools around the nation to give students unfettered access to digital support services, regardless of location. During this time, our proprietary software recorded and time-stamped 6,077,042 digital support interactions between students and Agents (trained mentors) using our platform.

We propose to work with Houston ISD to provide the same personalized, high-quality college readiness and tutoring services to students in grades 8 through 12. We offer a tried-and-true program implementation plan that gets students excited and motivated. Once they sign up and provide parental permission, we match students up with an Agent from a similar background and/or with similar academic or professional interests. Students and Agents communicate via our secure platform (most often by text). Agents are available on-demand to discuss

postsecondary planning, college applications, financial aid, enrollment processes, academics, as well as personal issues if students raise them.

WHAT'S SPECIAL ABOUT SSA

Rather than expecting students to come to us, we meet students wherever they are at–and we know that students are always on their phones or using technology. Agents communicate with students via text, phone, mobile app and/or email via their electronic devices. This communication occurs when it works for students, any day of the week–no waiting for an appointment. Our proprietary platforms allow students to safely connect with agents and get immediate support when they need it most.

WHAT SERVICES LOOK LIKE

Students have unlimited access to support from mentors and specialists via text, phone or email.

Prior to program kickoff, SSA collects student rosters to store in our secure database. SSA partners with Clever to ensure student records stay up to date with accuracy. Once a student opts-in to the platform via text, our team matches that student with our roster, then pairs that student with the appropriate Agent, based on the student's interests and background information provided during onboarding. Our team also takes ethnic and cultural backgrounds into account when pairing students with Agents to ensure students feel understood.

Dosage. Once students are connected with SSA, they have no limit on the amount of time or interactions with the platform. SSA's Agents are required to reach out to all students a minimum of once per week. Agents seek to first build rapport with students to gain trust and show they care. Agents work with students to establish goals, set milestones towards those goals, and connect them with resources and opportunities relevant to each student's goals.

If students wish to connect with an SSA Specialist for academic tutoring, financial aid coaching, or mental health, they may do so by requesting any of the services through the SSA platform. Once students request for a specialist, their dedicated Agent ensures that the first available SSA Specialist reaches out to provide personalized support. There is no limit to the number of times students may connect with the SSA Specialists. In prior years, we have seen that the students who leverage the platform interact with their Agent more than 100 times per year. We also found that 90 percent of students who leverage our specialists offerings return for a second session.

Duration. Students interact with the agency on the go via text message and/or mobile app more than 90 percent of the time. If a student decides to set up a phone call with an Agent or SSA Specialist, they may do so and there is no limit on the amount of time they may talk.

Students may interact with their Agent as much as they would like from the hours of 7 am to 10 pm in the students' time zone. SSA will not initiate any communication after 10 pm, but will answer students after 10 pm in the event of a mental health situation.

Format of Communication. All communication between students and Agents is conducted via mobile phone or email. Historical data shows that 95 percent of communication occurs via text, 4.5 percent of communication occurs via phone, and 0.5 percent of communication occurs via email.

SSA's proprietary software masks the real phone numbers of Agents and students, ensuring safe and secure communication. All sign-up activities are FERPA compliant and all consent forms are available upon request.

Agents have the knowledge and experience of providing academic, college and career, and social emotional services to students of diverse and multicultural backgrounds.

Agents and students work on a goal-setting framework to ensure students have a long-term postsecondary education and short-term academic goals. All Agents go through a two-part training from our Head of Impact on how to best support students socially and emotionally while navigating goals.

All students who are connected with an Agent gain access to a nationwide list of certified tutors, college career coaches, and mental health professionals in multiple languages. In the event that a student needs more niche support, they will have the opportunity to connect with an SSA Specialist.

SSA Agents come from diverse and multicultural backgrounds. Table 1 provides more information on the demographics of SSA Agents.

Table 1. Demographics of SSA Agents

Race / Ethnicity	Percentage
Asian / Pacific Islander	17.3%
Black / African American	24.8%
Latinx / Hispanic	15.8%
White / Caucasian	36.8%
Education	
First-generation college student	35.3%
Current undergraduate college student	36.9%
Hold a bachelor's degree	57.1%
Currently in graduate school	33.1%
Studying a STEM-related field	42.1%
Received a scholarship to attend college	77.4%
Hold a leadership position on campus	76.0%
Speak a second language	32.3%

HOW SSA WORKS WITH COUNSELORS AND SCHOOLS

Below is SSA's process developed over the past decade for ensuring school counselors and other support staff are equipped to collaborate with SSA Agents:

1.) School Buy-in Meetings - Prior to program kickoff, SSA meets with school counselors, support staff, and administrators to understand the district's priorities and get educators excited about collaborating with each other on student development.
2.) SSA Student Kickoffs - SSA coordinates a motivational experience for students to ensure excitement and engagement with the platform.
3.) SSA Support Staff Available - School counselors and support staff will have access to SSA's library of education videos along with the ability to talk with an SSA staff member for any type of support.

All training and tools provided to school staff is designed to help them maximize their time, not add more to their plate.

SSA's proprietary platform for school counselors and support staff is called the Winbox. SSA's Winbox allows school counselors to do the following:

1. Stay Aligned - The SSA Winbox integrates school counselors, SSA Agents, and other support staff in one platform. School counselors are informed of relevant student wins, challenges, and updates from Agents and other support staff.
2. Collaborate - Once school counselors and local support staff see updates from students/Agents, they may suggest relevant opportunities and resources pertaining to the local school/community. For example, if an Agent lists that a student wants to become a nurse, the school counselor may suggest that the student apply for a nursing scholarship the local hospital is offering to future nursing students.
3. Keep Records - All insights and updates recorded about students are logged and maintained in one platform. For school counselors who oversee mental health, records of all student safety cases are also logged with information on what happened and how the situation was handled.

LIAISON ASSIGNED TO THE DISTRICT

Houston ISD will be assigned Dr. LeAnna Wilson as their district liaison to ensure alignment between Agents, SSA staff, and district goals. Dr. Wilson has 16 years of experience as a public school teacher and 9 years in various positions at Pearson working with their partner schools, leadership teams, executive directors and cross-collaborative service providers to provide administrative coaching, large scale project planning, and customized support including developing revolutionary models for virtual Professional Learning Communities. Dr. Wilson's work published and presented her work twice at Harvard University during her established career in education.

RECENT EXPANSION OF SSA SERVICES

Our mission is to empower every person to harness their agency and fulfill their potential to discover new horizons for themselves and civilization. In pursuit of this mission, we are always looking to strengthen the

services we provide to schools and students. Our most recent development is the addition of comprehensive tutoring services for students.

Students may request tutoring services across over 130 different subjects, from algebra to music, physics to literature. Our subject matter specialists can work with them one time or weekly depending on the student's needs and preferences.

To access tutoring, students only have to let their Agent know, and the Agent reaches out to find an appropriate tutor. The tutor and student then schedule a time to work together that fits the student's schedule. These services are at no cost to students or their families and are included in the package offered to the district (that is, at no additional cost to the district).

Our Reputation and Experience

PREVIOUS EXPERIENCE WITH HISD

To date we have not had the pleasure of working with HISD.

IDENTIFIED REFERENCES

As requested, we have identified three references and sent them the surveys to provide feedback.

1. Clare Cerda (cdcerda@doe.nv.gov) - Nevada Department of Education
2. Laura Howard (lhoward3@montevallo.edu) - Jefferson County GEAR UP Program
3. Aaron Mitchell (Aaron.Mitchell@hed.nm.gov) - New Mexico Higher Education Department

HOW WE APPROACH CUSTOMER SATISFACTION

At SSA, we are committed to ensuring our customer's enthusiastic satisfaction with our services. Some of the ways we do this include

- We assign **a single individual as an account manager** who serves as the liaison between the district and SSA staff. This person works with the onboarding team to maximize the student opt-in rate, with the services team to select Agents who fit the district's demographic profile, and with the specialist team to design initiatives that match district priorities (such as boosting FAFSA completion or holding college match workshops).
- The account manager meets regularly with the district representative to ensure that Agents and specialists are addressing district needs.
- We have designed our platform to display **dashboards that match the needs and focus of those using them**. For example, a district-level dashboard aggregates data across participating schools in the district, while a principal can look at school-level data and teachers or counselors can check the progress of their individual students.

On a customer satisfaction survey conducted with 79 of our partners in fall 2021, schools were most likely to express satisfaction with the ability of students to access Agents online and anytime, as well as the way Agents initiate check-ins with students. To the degree they identified something we could change to improve our services to them, it usually had to do with efforts to boost or sustain student engagement with their Agents. On a scale of 1-10 (10 being the highest), when asked how likely they were to recommend SSA to their colleagues, our partners gave us, on average, a score of 8.3. Our growth has been almost entirely by word of mouth and a few RFPs–we have never had a sales or marketing team. Furthermore, over the past 10 years, we have retained 99 percent of our partners.

Below we have provided a list of our recent clients, the services provided, and the dates we have served them.

Organization	Contact Name and Title	Email and Phone	Services and Dates
Los Angeles Unified School District	Janicia Centeno Castillo, Director	jcente2@lausd.net 213.241.0150	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
State of Georgia	Dawn Cooper, Director	dawn.cooper@usg.edu 404-962-3123	1:1 digital postsecondary career advising, tutoring, and education 2018-Present
Oklahoma City Public Schools	Alex Souza, Instructional Leadership	absouza@okcps.org 405 587-0504	1:1 digital postsecondary career advising, tutoring, and education 2021-Present
DeKalb County School District	Shannon Crosslin, Student Support Services	shannon_crosslin@dekalbschoolsga.org 678-676-1890	1:1 digital postsecondary career advising, tutoring, and education 2021-Present
State of New Mexico	Corine Frankland, Director	Corine.Frankland@hed.nm.gov	2017-Present
Institute for Public School Initiatives (Multiple Districts in South Texas Region)	Noe Benavidez, Program Manager	nbenavidez@ipsi.utexas.edu 361.726.1223	1:1 digital postsecondary career advising, tutoring, and education 2018-Present
Jefferson County	Chrystal Abernathy, Director	ctolber3@montevallo.edu (205) 382-1389	1:1 digital postsecondary career advising, tutoring, and education 2018-Present

Seminole State GEAR UP Program	Julie Hix, Director	j.hix@sscok.edu 405-382-9681	1:1 digital postsecondary career advising, tutoring, and education 2019-Present
State of Arizona Department of Education	Andrea Gonzalez, Project Manager	andrea.gonzalez@nau.edu	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
State of Nevada Department of Education	Javier Smith, Program Director	javier.smith@doe.nv.gov 775-687-9148	1:1 digital postsecondary career advising, tutoring, and education 2018-Present
Philadelphia School District	April Alcaraz, Director	aalcaraz@philasd.org 215-400-5982	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
State of Montana Department of Education	Travis Anderson, Director	tanderson@montana.edu (406) 449-9139	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
Iredell-Statesville Schools	Rebecca Wilbur, Director	rebecca_wilbur@iss.k12.nc.us 704-500-7868	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
Tarrant County To and Through Program	Charles Campbell, DIrector	ccampbell@t3partnership.org	1:1 digital postsecondary career advising, tutoring, and education 2020-Present
Kentucky Department of Education	Kim Welch, Director	kim.welch@ky.gov 859-338-8142	1:1 digital postsecondary career advising, tutoring, and education 2020-Present

Waterbury Public Schools	Nyree Toucet, Director of College and Career Readiness	ntoucet@waterbury.k12.ct.us	1:1 digital postsecondary career advising, tutoring, and education 2022-Present
Birmingham City Schools	Tan Goldsmith, Director	tgoldsmith@bhm.k12.al.us 205.266.9956	1:1 digital postsecondary career advising, tutoring, and education 2018-2022 (grant ended)
Appalachian State GEAR UP Program (6 schools in North Carolina)	Corinne Smith, Director	smithmc3@appstate.edu 828-262-6041	1:1 digital postsecondary career advising, tutoring, and education 2018-2022 (grant ended)
Lancaster Independent School District	Cassandra Barker, Assistant Superintendent	CassandraBarker@lancaster isd.org	1:1 digital postsecondary career advising, tutoring, and education 2021-Present

EVIDENCE OF EFFECTIVENESS OF OUR SERVICES

We do not have any academic publications about the efficacy of our work with students. We do, however, have a set of third-party evaluations that look at the impact of working with SSA Agents on student enrollment and persistence in post-secondary education as well as absenteeism. These are posted for public viewing on our website:

http://studentsuccess.co/results/

In addition, we have been featured in Forbes 30 Under 30, TEDx, Inc. 5000 and Forbes Top Education Companies to Work For

https://www.forbes.com/profile/student-success-agency/?sh=437ed4ec2d77

https://www.inc.com/profile/student-success-academy

https://youtu.be/YWyKdKY2HPU

In addition, many educators and students have provided meaningful testimonials, which are also available on our website:

http://studentsuccess.co/stories/

FILING FOR REORGANIZATION, PROTECTION FROM CREDITORS, OR DISSOLUTION UNDER BANKRUPTCY STATUTES

SSA has never filed for any of these.

Extent to which the goods or services meet the District's needs

LENGTH OF TIME PROVIDING SERVICES

Yes. We began serving students in 2012, starting with 800 students in the state of Texas.

Since 2020, our organization has partnered with more than 500 schools in 22 states to give students unfettered access to digital support services, regardless of location. During this time, our proprietary software recorded and time-stamped well over six million digital support interactions between students and Agents using our platform.

WORK WITH LARGE URBAN DISTRICTS AND LESSONS LEARNED

We currently work with Los Angeles Unified School District, DeKalb County Public Schools, Clark County School District (Las Vegas), Philadelphia School District, and Miami Dade Public Schools. Results in our partner school districts include a 15.7% increase in college matriculation, a 13% decline in absenteeism, and 8.4% higher GPA among those students who sign up for an Agent.

SSA was recently awarded an RFP for College and Career Readiness Services in Chicago Public Schools.

In our large urban districts, SSA has learned over time to design and refine various levels of data dashboard to inform teaching and counseling staff in schools, project directors, and district administrators how use of the platform is progressing within the district overall as well as within individual schools or classes. The data dashboards now allow building-level educators to take action with individual students or classes, while giving district admins reporting tools needed to see a zoomed out picture of success.

Due to lessons learned in our larger urban partnerships, SSA has also learned to bring on staff that look at student level outcomes in the partnership. SSA has also implemented a flagging system to allow educators to see when students might be at risk for not engaging with the platform.

MODIFICATIONS FOR STUDENTS WITH SPECIALIZED EXPERIENCES OR NEEDS

SSA is intentionally designed so that Agents can meet students wherever they are at. Although there we provide Agents with checklists and templates for post-secondary plans, the way they are completed and then implemented will always depend on the needs, interests and goals of students.

Whenever possible, we connect students with beginning English proficiency to Agents who speak their native language. Among our bilingual Agents, Spanish is the predominant language other than English, and we are fully equipped to meet the needs of Spanish-speaking students.

If students are newcomers from other language backgrounds, we check to see if we already have any Agents who are native speakers that we can match them with. If not, we engage in some targeted recruitment and have the students work with Agents with ELL backgrounds until we can match them up with someone speaking their native language.

As noted earlier, whenever possible, we will match students with Agents who have similar life experiences or interests, which helps to deepen the connection and offer students a model of someone who has coped successfully with similar challenges. For example, if we learn that a student is in a special education or Gifted and Talented program, we can offer to reassign them to an Agent who has also been in that position and has dealt with the challenges and benefits this may offer.Some of our Agents have also experienced a range of difficult situational circumstances, such as foster care, temporary living situations, or mental illness and can talk about this with students. We also have specialists who focus on student safety and mental health, led by our Head of Impact, Rubi Herrera Franco, MSW and our Safety Department Supervisor, Rachel Mills-Brantley, LCSW, MSW.

DATA DASHBOARD

Our platform has a dashboard that can display aggregated data at the district, school, or class level, but it can also display data on a single student so that a teacher or counselor can view a student's progress toward the milestones they have set with their Agent.
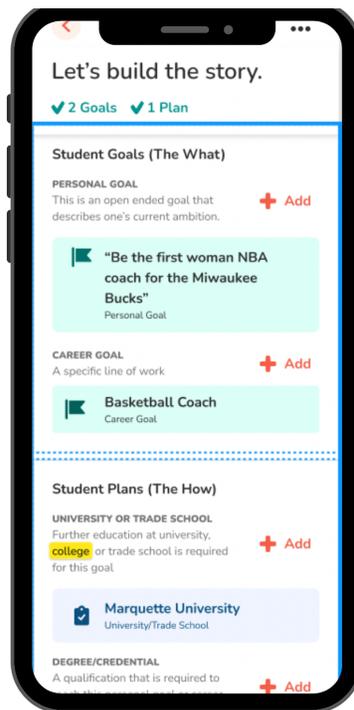
LANGUAGES AVAILABLE TO STUDENTS

The platform on which students and Agents interact is in English, but a third of our Agents speak a language other than English. This is most commonly Spanish, but we have also been able to match individual students with Agenta who are fluent in 22 other languages.

DATA AND REPORTING TO THE DISTRICT

SSA's secure web-based portal has various levels of reporting functionality that varies depending on the role of an educator in the district. The number of user accounts is not capped. SSA's dashboard allows programs to view live data on student engagement. SSA provides a monthly report on the progress of the program including college readiness tracking such as FAFSA completions and postsecondary plans created by students.

In addition, because data are updated in real time, educators may at any time pull their own reports. While the dashboard that educators view is not customizable, reports are, and district administrators, principals, counselors and teachers may choose what they want to include in reports. Furthermore, data may be exported in csv or xls format and then merged with other district data, if desired.

TWO-WAY COMMUNICATION

As described above, the SSA platform is set up to allow students to communicate any time, from any place, with their SSA Agent. Students can text, email, or talk by phone with their agents, though we have observed in the past that 95 percent of communication takes place by text.

HOW STUDENTS WORK ON THEIR COLLEGE APPLICATIONS

All students who opt-in to SSA gain access to our mobile app. Within the mobile app, students and Agents collaborate virtually to identify long-term goals (e.g. "I want to go to University of Houston") as well as milestones to check off in the process (e.g. complete Common Application, write essays, etc). Students have unfettered access to their mobile app and counselors have the ability to view students' progress from their dashboard as well. In addition to creating goals and milestones in the app, Agents and counselors can suggest opportunities for students that are relevant to their journey, based on their background and specific goals. Students are notified of opportunities suggested to them and access SSA's Agents for support on applying for scholarships, writing essays, and much more.

INTEGRATION WITH THE COMMON APPLICATION AND WITH APPLY TEXAS

Our platform does not integrate with the Common Application or Apply Texas.

SUPPORT FOR VOCATIONAL EQUIPMENT

The SSA platform focuses on post-secondary planning and preparation, not on vocation equipment.

Long-term cost to the District to acquire goods and/or services

ANTICIPATED ANNUAL PRICE INCREASES

SSA has various tiers of pricing that depend on the district enrollment size and target population of students being served. The price of those tiers will not change over the next five years.

Each tier comes with a bundle of academic tutoring services included in the price. The only price increase that Houston ISD could incur over the next five years would be to purchase an additional bundle of tutoring hours, if the district were to decide to purchase more tutoring than included in the initial package.

PAST ANNUAL PRICE INCREASES

We have not changed our price structure in the past five years.

EXPECTED PRICE DECREASES DUE TO COMPETITION

We intend to remain competitive with industry pricing. That said, we currently do not believe that we have any competitors who offer packages comparable to what is included in the SSA platform. Some companies offer some of what we do, such as near-peer mentoring or text-based reminders to submit college applications, but no one offers the personalized support and relationships, post-secondary planning, communication with counselors, dashboard with multiple viewing options, as well as mental health and tutoring specialists—all available to students on their own schedule, after school and on weekends, every day of the year.