

Research Terms & Research Flow Schematic

Introduction

This document defines important terms related to the Research and Learning portion of the Scaling CBPL project, specifically terms for the LEAs using Co-Marketing/Selling Co-Branded Bundled Offerings (hereafter referred to as “co-bundled offerings”). It also presents a schematic of the relationships and timing between “pilot sites” and “research sites” and presents an example scenario of pilot sites and research sites for a publisher with multiple co-bundled offering partnerships.

Research Terms

Pilot Site

LEAs with schools using the co-bundled offering. These LEAs use the bundled offerings in the *first year of the partnership's bundled offering implementation* in a Gates focus state. These LEAs can, but don't have to, participate in the learning agenda as a research site.

Research Site

LEAs participating in the research data activities for the learning agenda in Gates focus states. These LEAs may enter the research in the 2025-26 school year or 2026-27 school year of the project (if they first experience a co-bundled offering that year). LEAs participating in the research can be those participating as pilot sites or can be additional customers from focus states (see below).

Additional Customers

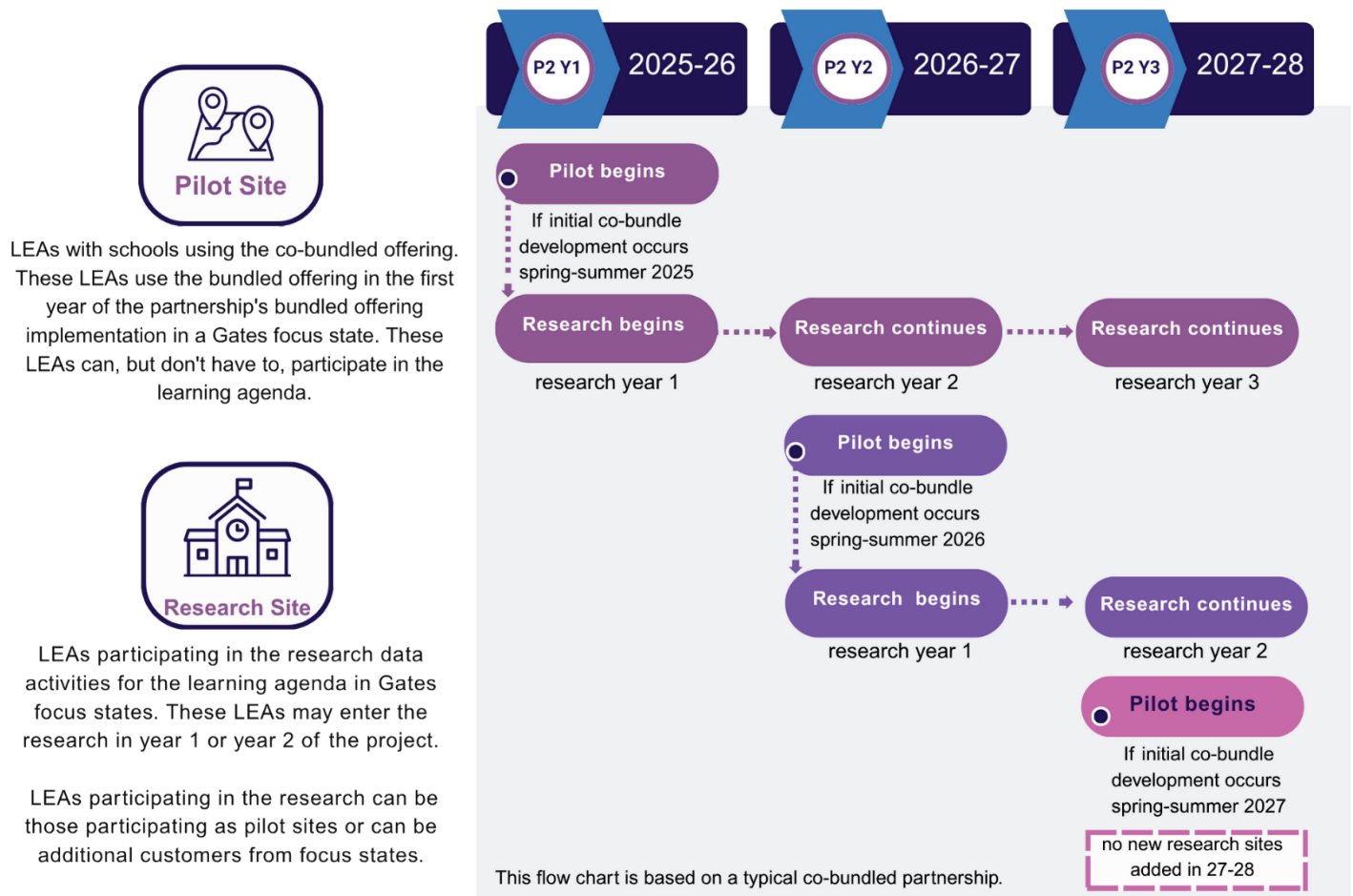
Partnerships will be actively marketing/selling bundled offerings to LEAs in focus/non-focus states once the partnership has piloted the co-bundled offerings. These additional LEA customers can participate or not participate as a research site. Additional customers can only participate as a research site if they are in a Gates focus state.

Case Study

The Research and Learning Agenda defines a case study at the LEA level.

Graphic. Definitions with pilots and research sites outlined ([Canva Link](#))

Pilot & Research Site Timing



Pilot Site and Research Site Flow Schematic

The schematic shown below represents both the pilot and research work streams within a co-bundled partnership over the Scaling CBPL project.

In addition to the schematic, here are a few key points of clarification about pilot and research sites.

1. Partners within co-marketing/co-selling partnerships will test the delivery of co-bundled offerings in two or three recruited LEA pilot sites within the Foundation's focus states (CA, TX, NY, FL) serving at least 50 percent Black, Latino, and low-income students.
2. Not all LEA pilot sites have to be a LEA research site.
3. A minimum of two LEA pilot sites per publisher (across all co-bundled partnerships) must participate as a research site in 2025-26.
4. A total of eight schools can participate in the data activities of the learning agenda from all LEA research sites for a given publisher. Within a single LEA research site, a maximum of six schools can participate in the data activities of the research plan for the learning agenda (i.e., leaving two schools to represent the other LEA).

Publisher Scenario

This publisher scenario includes both the pilot and learning agenda work streams across the grant and the following conditions:

- one publisher with three co-bundled partnerships beginning implementation in 2025-26
- fourth partnership developed during 2025-26 that launches in 2026-27

Pilot Site and Research Site Flow Schematic

Category	Y1 2025-26	Y2 2026-27	Y3 2027-28
		Research is solidified end of year 2	No new research site added
Pilot Sites and Additional Customers	Partnership 1: LEA 1 LEA 2 Partnership 2: LEA 3 LEA 4 Partnership 3: LEA 5 LEA 6	Partnership 4: LEA 7 (new pilot) Additional customer: LEA 8 (focus state new pilot) LEA 9 (non-focus state) LEA 10 (focus state new pilot)	Additional customer: LEA 11 (focus state new pilot) LEA 12 (focus state) LEA 13 (non-focus state)
Research Sites	LEA 1 LEA 4	LEA 1 LEA 4 LEA 8 LEA 10	LEA 1 LEA 4 LEA 8 LEA 10
Funding Caps	Pilot sites: Two LEAs per partnership with up to eight schools across the two LEAs per bundled partnership (no more than six schools from a single LEA) Professional learning provider - 25K per school within an LEA pilot site Research sites: Publisher provides 20K per LEA for incentives to participate in research.		