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**Facilitator Guide – Procurement**

**What is in this Guide?**

This guide provides facilitators with the information they need to conduct a workshop around the essential components of state and/or district digital learning plans. It is our assumption that the facilitator will have at least a basic knowledge about learning in the digital age. Ideally, the facilitator should understand the basic components of a digital learning plan.

This guide provides facilitators with step by step activities, with suggested times for each activity, as well as narrative content and resources to support the topic. This guide is accompanied by a presentation slide deck for use during the workshop. It also includes a link to the logistics spreadsheet to help facilitators plan the workshop. Logistics include recommendations for audio visual, catering, registration and outreach.

This facilitator guide can be used in its current format or it is easily customizable to meet your needs. The guide is organized as follows:

* Purpose of the workshop
* Objectives for participants
* Key sections with suggested times
* Resources

**Purpose of the Workshop**

The goal of this session is to provide participants (typically school and district leaders with the opportunity to gain knowledge and resources to develop and enhance procurement and RFP management to support digital learning.

**Objectives**

* Learn more about procurement and RFP management
* Identify procurement challenges and success stories
* Collaborate with colleagues and develop solutions for challenges
* Discuss how changes in state/local policies can improvement the procurement process
* Develop and maintain relationships with other district and state leaders

**Session Overview (60 minutes)**

* Welcome and Introductions (5-10 minutes)
* Background (5-10 minutes)
* Procurement and RFP (10 minutes)
* Draw the Solution Activity (20-25 minutes)
* Policies (5-10 minutes)
* Reflection (5-10 minutes)

\*\*Please note – the timing of activities requires a rapid paced session. Each facilitator will need to consider their audience (as related both to background knowledge and size) as well as future opportunities for professional learning opportunities around the topic and then choose the activities and time commitment for each.

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**Welcome and Introductions (5-10 minutes)**

***Facilitator Note:*** *Introduce yourself, review the agenda and logistics for the session. Introduce the welcome activity. This activity will get participants to think about their procurement challenges and successes. You can also choose an activity from the Activity Toolbox.*

**Twitter Like Sharing**

After introductions, in an effort to share thoughts in a concise way, participants will post via an online collaboration tool (Google Doc or other format) thoughts about specific topics in 140 characters or less.

* Describe your biggest procurement challenge this month—in a 140 characters or less
* Describe a recent procurement success story—in a 140 characters or less

Survey the audience to see if they have Twitter accounts. Encourage the participants to exchange twitter handles to foster ongoing collaboration. Shares a HASHTAG for the discussion and directs participants to post their statements.

**Background (5-10 minutes)**

***Facilitator Note:*** *Share some general information about procurement in the digital age, including the challenges in navigating the process. The facilitator will also share a featured video.*

**Overview**

Widespread access to digital instructional materials is often dependent on successful navigation of the purchasing process. State procurement is often like the peeling of an onion—there are multiple layers to go through. In education, the buying and selling of merchandise and services, whether it is furniture, technology equipment, paper, broadband connectivity or instructional materials, typically requires following some level of state or local procurement laws.

Some states have a procurement office specific to the department of education, whereas, other states may use statewide central purchasing as a standard. At the district level, some districts utilize cooperative purchasing through regional consortia and other districts may provide flexibility at the school level to make decisions regarding the acquisition of products and services. This is true for all purchases including instructional materials. Some states and districts might have policies for obtaining office furniture, but not for the acquisition of instructional resources. Other states may have policies for textbook adoption, but not for acquiring digital tools and resources or OER.

States and districts can work to make the procurement process more transparent, and develop specific procedures to aid educators and the private sector in navigating the process. All stakeholders (public and private) should commit to developing relationships with a variety of decision-makers, recognizing that there are multiple interested parties with differing needs.

**Quick Facts**

* 27 states have guidelines for the sale and purchasing of instructional materials
* 8 states have policies and/or guidelines specifically addressing the procurement of digital instructional materials.
	+ [SETDA DMAPS portal](http://dmaps.setda.org/)

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**Procurement and RFP Management** **Details (10 minutes)**

***Facilitator Note:****Based on the audience - use the notes below to share details regarding procurement and RFP management best practices and considerations. This will provide the audience with additional background knowledge and resources.*

[Ed Tech Rapid Cycle Evaluation (RCE](https://tech.ed.gov/rce/)) helps educators make evidence based decisions on acquiring digital tools/applications. The Coach’s five-step process includes intuitive tools that serve as embedded professional development for educators that might not have a traditional research background or research capacity. This tool provides faster methods for product evaluation and shares results. For more information on RCE, please review the Best Practices module.

The [Improving Ed-Tech Purchasing](http://digitalpromise.org/2014/11/13/improving-ed-tech-purchasing/) report provides the following recommendations to improve the procurement process:

* Better guidelines for conducting needs assessments and including end users in the process
* Faster methods of evaluating products and better ways of sharing results
* Simplified Request for Proposal (RFP) processes to ensure a level playing field and high-quality results
* Pilot approaches that increase rigor and drive purchasing decisions without over-burdening teachers
* Incentives for providers to get results and show evidence, such as performance-based contracting and prizes
* Websites with trusted information about educational technology tools and district procurement policies and better ways to match providers and products with educators
* More research about funding strategies for acquiring educational technology products

In the 2016 report, [Broadband Imperative II: Equitable Access for Learning](http://www.setda.org/wp-content/uploads/2016/09/SETDA-Broadband-ImperativeII-Full-Document-Sept-8-2016.pdf), SETDA recommends that states and districts leverage policies, networks, and purchasing options, including utilizing innovative purchasing options for buying power.

The [New Jersey Broadband Component of the Digital Readiness for Learning and Assessment Project (DRLAP)](http://www.mresc.k12.nj.us/dynimg/_QaAAA_/docid/0x096206D67ED04A84/54/NJDRLAP-Broadband%2BReport%2B17JUL15v1.pdf) created a regional purchasing consortium for telecommunications services to help schools collaborate in order to bring down the cost of high-speed broadband services; offer basic internet service (up to 100 Mbps) and high speed (over 100 Mbps); and help establish a statewide WAN through regional consortia for internet services as well as for other services. The initial consortia contracts resulted in $89 million in savings for participating schools while increasing bandwidth by 150%.

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**Draw the Solution Activity (20-25 minutes)**

***Facilitator Note:*** *Use this activity to focus on challenges in the Procurement / RFP Management process. Facilitator asks each group to address one of the challenges identified during the welcome activity and draw the solution. How they draw it is up to them. Stick figures are fine, details are okay too. Metaphors are great. If a lumpy box is a factory to you, then it’s a factory for us too. Besides, rawness is helpful because it allows other people to project their imaginations on to your work. This activity is best done in small groups. Each group will need chart paper and markers. If time, have each group share the solution with the whole group.*

**Policies and Initiatives (5-10 minutes)**

***Facilitator Note:*** *This discussion will depend on your audience. Discuss how state and local leaders can build capacity for procurement and RFP management by coordinating efforts and engaging in strategic planning.*

**Discussion Questions**

* Are there local policies/practices that can be updated to support procurement or RFP management?
* Which stakeholders need to be involved in the conversations?
* How can you in your role at the state/district improve the procurement process?

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**Reflection and Wrap Up (5 minutes)**

***Facilitator Note:*** *Take a few moments to reflect on the session, share details about additional events related to the remainder of the day and engage the audience to take action when they return to their schools/districts. Use this Out-the-Door activity or choose another one from the Activity Toolbox.*

**Out-the-Door Activity**

After writing down the learning outcome, ask participants to take a card, circle one of the following options, and return the card to you before they leave:

* Stop (I'm totally confused.)
* Go (I'm ready to move on.)
* Proceed with caution (I could use some clarification on . . .)

Based on the reflection activity, identify the next steps for your state, district or school.

**Wrap-Up**

***Facilitator Note:*** *The facilitator wraps up the day and shares resources with participants. Sample language: “This is only the first step of many steps in supporting teachers and students for learning in the digital age. I encourage you to follow up on our reflection activity during the next few weeks and continue to collaborate with your peers.*

**Resources**

The US Department of Education does not endorse any resources; instead they are provided to assist the facilitator in preparing for the workshop. The facilitator can also share these resources with participants to support on-going professional learning and school/district planning after the workshop. For example, some districts have used the NETP for on-going book studies throughout the school year to support the development and refinement of technology initiatives.

**US Department of Education Resources**

[Building Technology Infrastructure for Learning](https://tech.ed.gov/futureready/infrastructure/)

[Ed Tech Rapid Cycle Evaluation](https://tech.ed.gov/rce/)

[Every Student Succeeds Act (ESSA)](https://www.ed.gov/essa)

[National Education Technology Plan (NETP)](https://tech.ed.gov/files/2017/01/NETP17.pdf)

**Facilitator Guide Resources**

[Broadband Component of Digital Readiness for Learning and Assessment Project (DRLAP)](http://njdigitallearning.org/nj_digital_learning_portal_library/broadband-consortia-project/)

[Digital Instructional Materials Acquisition Policies for States (DMAPS)](http://dmaps.setda.org/)

[Navigating the Shift](http://www.setda.org/wp-content/uploads/2015/10/SETDA_Navigating-the-Digital-Shift_full_10.19.15.pdf)

[The Technology for Education Consortium](http://techedconsortium.org/)