



**NORTH CAROLINA**  
State Board of Education  
Department of Public Instruction

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# Report to the North Carolina General Assembly

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Cooperative Purchasing Agreements  
*SL 2015-241 (HB97), Section 8.14(d)*

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Date Due: October 15, 2021  
DPI Chronological Schedule, 2021-2022

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## COOPERATIVE PURCHASING AGREEMENTS

**SL 2015-241 (HB 97) SECTION 8.14:** By October 15, 2015, and annually thereafter, DPI and the Friday Institute shall report on the establishment of the cooperative purchasing agreements, savings resulting from the establishment of the agreements, and any issues impacting the establishment of the agreements. The reports shall be made to the Joint Legislative Oversight Committee on Information Technology, the Joint Legislative Education Oversight Committee, and the Fiscal Research Division.

## BACKGROUND

Cooperative purchasing agreements allow Public School Units to leverage economies of scale by purchasing technology equipment and instructional materials at lower rates than an individual PSU (especially smaller PSUs) would be able to secure on their own.

For many years, PSUs have leveraged commodity contracts through the Department of Administration, as well as IT Term Contracts from the Department of Information Technology. These contracts, especially contract 915A for cellular telephone service, became especially useful during the COVID-19 pandemic in helping PSUs secure mobile hotspots, tablets, and other devices quickly and affordably.

Over the past few years, DPI has provided additional cooperative purchasing agreements to PSUs based on recommendations contained in the *North Carolina Digital Learning Plan*. These agreements primarily exist in three forms:

- Procurements that are made by DPI on behalf of PSUs. For example, the DPI purchases a set of encyclopedia resources (known collectively as NCWiseOWL) and makes them available to all PSUs free of charge. This represents the most direct savings to individual PSUs as these costs are paid centrally.
- Cooperative contract pricing that is made available to all PSUs. For example, DPI holds a contract with Instructure Learning for the Canvas Learning Management System. Any PSU may purchase Canvas licenses from this contract at the state-negotiated rate.
- Hybrid approaches where some materials are provided to PSUs and PSUs have cooperative pricing for additional purchases. For example, as a part of the Read-to-Achieve Program, DPI purchases Amplify Learning's mCLASS for all students in Kindergarten through third grade. However, PSUs may purchase licenses for students in grades 4 through 6 at the state negotiated rates.

Additionally, some products are included in the *Home Base* suite of tools. For these products, DPI charges \$1 per ADM to recover costs, and allows access to several tools for this cost. 114 out of 115 LEAs have opted-in to *Home Base*, which provides access to the Schoolnet Instructional Improvement System and the NC Educator Evaluation System's Professional Development modules.

There is currently no mechanism in place to track the utilization of any statewide contract without individually auditing each specific purchase order between every PSU and the contracted vendor. In addition, the savings generated using these procurements is difficult to quantify for several reasons:

- Vendor pricing is not always transparent – it is often difficult to know what the difference in cost would be for a PSU were they to procure the same product on their own.
- PSUs may be able to negotiate lower costs for alternative products on their own but may choose instead to use the service “endorsed” by DPI.
- PSUs may have opted to not subscribe to a service or to subscribe to a lower tier of service were the convenience contract not available.

The primary cost savings from adopting a convenience contract solution results from streamlined implementation and configuration services: by leveraging state resources to configure the integration, these costs are often one-time costs that can be absorbed by DPI or distributed evenly between the PSUs. The result is that the deployment is often less expensive for both the state and individual PSUs, is often much simpler, and leverages integrations with state systems that PSUs could not achieve on their own. Anecdotally, other sources of savings may include:

- Legal overhead involved in the RFP and contract negotiation process duplicated between PSUs.
- Administrative and cybersecurity challenges that are shifted from each PSU to DPI.
- Consistency of implementation and training between PSUs and the reduced training burden when a staff member transitions between PSUs.
- Centralized or community-driven vetting of digital resources.
- The ability to share resources and supplemental materials between PSUs.

## **SUPPORTING EFFORTS**

Since the last convenience contract, the following efforts have been undertaken to support collaborative procurement in North Carolina:

### **RECOMMENDATIONS FOR COLLABORATIVE PROCUREMENT**

Submitted by the Friday Institute for Educational Innovation, August 1, 2019. This report provides recommendations collected from interviews with over 200 educators and district leaders detailing the greatest needs from collaborative procurement efforts. A copy of this memo is included in Appendix A.

### **DIGITAL CONTENT RFI**

To support districts in procuring digital content during the COVID-19 pandemic and to support effective utilization of the initial COVID-19 recovery funds, the Friday Institute issued a formal Request for Information (RFI) to digital content vendors to solicit pricing information along with alignment to security, interoperability, and accessibility standards. Vendors were also asked to submit a list of districts that were using specific products so that districts could work together to solicit recommendations or to develop collaborative contracts. A total of 76 products were included in responses to this RFI, and this information was turned over to PSU technology directors. A copy of the RFI is included in Appendix B.

## **CONTRACTS**

The following agreements were developed, executed, or utilized in the 2020-2021 academic year and represent agreements where DPI provides services to all PSUs or where PSUs may leverage convenience pricing. Note that a “convenience contract” establishes pricing for the PSUs but DPI does not pay for services on behalf of the PSU unless otherwise indicated:

### **IDENTITY AND ACCESS MANAGEMENT**

Provides for a single statewide login system that provisions accounts and access for students and staff automatically and facilitates integration with both DPI-level and PSU-level applications.

- Vendor: Identity Automation, LP
- Contract Type: DPI purchased on behalf of all PSUs
- Contract Start Date: October 1, 2018
- Contract End Date: September 30, 2021
- Contract Number: RQ21464696
- Cost: \$1,700,000 (2020/2021 Academic Year)

#### **CYBERSECURITY TRAINING**

Pursuant to SL2020-04 COVID Recovery Act legislation, NCDPI purchased a license for KnowBe4 Cybersecurity Training software for all PSUs. These 185,000 licensees were issued to all PSUs at no charge to the PSU.

- Vendor: KnowBe4
- Contract Type: DPI purchased licenses on behalf of all PSUs; \$547,600.00
- Contract Start Date: September 23, 2020
- Contract End Date: June 30, 2022
- Contract Number: Purchased under DIT master contract number ITS-41-2018-35JB.
- Cost: \$547,600 (Contract Term)

#### **READ-TO-ACHIEVE ASSESSMENT SOFTWARE**

The new Read-To-Achieve RFP selected a single statewide vendor for K-3 reading assessments to ensure consistency across PSUs. The selected product was mCLASS, from Amplify Education.

- Vendor: Amplify Education
- Contract Type: Hybrid. DPI purchased licenses for all students in grades K-3. Convenience contract pricing was included to allow PSUs to purchase licenses for additional grades. The contract included training for K-3 teachers and set pricing for others.
- Contract Start Date: May 28, 2021
- Contract End Date: June 30, 2024
- Contract Number: 40-PR11968232
- Cost (DPI Only): \$2,897,500 (2021-2022 Academic Year)

#### **APPLICANT TRACKING SYSTEM**

The Applicant Tracking System is available to PSUs on an opt-in basis. For PSUs that opt-in, DPI pays for the service centrally. PSUs may elect instead to procure and pay for a system on their own. The contract was awarded to TeacherMatch, Inc. in April 2015. Through multiple acquisitions, PowerSchool now owns the original product. This product is being retired and PSUs are currently being upgraded to the PowerSchool Applicant Tracking System.

- Vendor: PowerSchool
- Contract Type: DPI purchased licenses on behalf of all PSUs that opt-in

- Contract Renewal Date: July 1, 2021
- Contract End Date: June 30, 2024
- Contract Number: NC10196522, Amendment 18
- Cost: \$1,205,561.99 (2021-2022 Academic Year)

#### **ANONYMOUS TIP LINE**

Provides access to an Anonymous Tip Line, Safety App, and notification services for PSUs.

- Vendor: Sandy Hook Promise Foundation
- Contract Type: DPI purchased on behalf of all PSUs that opt-in
- Contract Renewal Date: May 23, 2019
- Contract End Date: May 22, 2022
- Contract Number: NC10518609
- Cost: \$603,728 (2021-2022 Academic Year)

#### **COMPETENCY-BASED ASSESSMENT PLATFORM FOR COMMUNITY COLLEGE READINESS**

Purchased a competency-based assessment program to support placement in courses in the NC Community College System as a part of the Career and College Ready Graduates Program

- Vendor: The NROC Project
- Contract Type: DPI purchased on behalf of all high schools
- Contract Renewal Date: July 1, 2020
- Contract End Date: August 30, 2021
- Contract Number: 40-RQ22447363
- Cost: \$469,000 (2020-2021 Academic Year)

#### **INTERNET SERVICE**

Through the School Connectivity Initiative, DPI maintains a contract for Internet connectivity for each PSU through Department of Information Technology.

- Vendor: NC DIT/MCNC
- Contract Type: DPI purchased on behalf of all PSUs that opt-in
- Contract Start Date: July 1, 2017
- Contract End Date: June 30, 2022
- Contract Number: MOU EP-PR12138222
- Cost: \$20,000,000 (Includes managed firewall and content filtering services below)

#### **MANAGED FIREWALL SERVICE**

Through the School Connectivity Initiative, DPI maintains a contract for PSUs to opt-in to a centrally managed and patched firewall through the Department of Information Technology. DIT is responsible for the installation and configuration of these firewalls within the PSU

- Vendor: NC Department of Information Technology
- Contract Type: DPI purchased on behalf of all PSUs that opt-in
- Contract Start Date: July 1, 2017
- Contract End Date: June 30, 2022
- Contract Number: MOU EP-PR12138222

### **MANAGED CONTENT FILTERING**

Through the School Connectivity Initiative, DPI maintains a contract for PSUs to opt-in to a centrally managed content filtering solution. This contract is awarded to MCNC who runs the ZScaler product.

- Vendor: MCNC
- Contract Type: DPI purchased on behalf of all PSUs that opt-in
- Contract Start Date: July 1, 2017
- Contract End Date: June 30, 2022
- Contract Number: MOU EP-PR12138222

### **CLIENT NETWORK ENGINEERING**

Through the School Connectivity Initiative, DPI maintains a contract for technical assistance for network setup and configuration, available to all PSUs, through MCNC

- Vendor: MCNC
- Contract Type: DPI purchased on behalf of all PSUs that opt-in
- Contract Renewal Date: July 1, 2019
- Contract End Date: June 30, 2024
- Contract Number: 40-CMSA
- Cost: \$1,800,000 year

### **WI-FI INFRASTRUCTURE (E-RATE CATEGORY 2)**

Establishes contracts with vendors to provide high-density wi-fi infrastructure on a 5 year contract, with five optional one-year extensions. This contract was awarded to 32 vendors.

- Vendors
  - Cisco
  - Aruba/HP
  - Extreme
  - Ruckus
  - SonicWall
  - Juniper
  - Double Radius
  - EC America / Immix
  - Cambium
  - D-LINK
  - Arista
  - Tripp Lite
  - A3 Communications
  - Synnex
  - Vertiv
  - CNIC
  - Applied Network Consulting
  - Benchmark
  - CDW-G

- Converged
- CustOS
- Data Network Solutions
- TiberCreek
- DISYS
- Encore
- ENA
- NWN
- Pharr Tech
- RMSource
- SecurEdge
- SHI
- Contract Start Date: July 1, 2020
- Contract End Date: June 30, 2025
- Contract Number: 40-RQ22294323
- Cost: \$9,600,000

#### **NCWISE OWL**

NCWise OWL is a suite of encyclopedia and reference materials provided by the Division of Digital Teaching and Learning to all PSUs at no charge.

- Contract Type: DPI purchased licenses on behalf of all PSUs
- Vendors
  - EBSCO Information Services
    - Contract Renewal Date: July 1, 2021
    - Contract End Date: June 30, 2022
    - Contract Number: 200018-004
    - Cost: \$323,617 (2021-2022 Academic Year)
  - Encyclopedia Britannica, Inc.
    - Contract Renewal Date: July 1, 2021
    - Contract End Date: June 30, 2022
    - Contract Number: NC10299755
    - Cost: \$240,000 (2021-2022 Academic Year)

#### **OPEN EDUCATIONAL RESOURCES REPOSITORY**

This service is a repository of Open Educational Resources, allowing teachers to find standards-aligned resources on the Internet, rate the quality of OER materials, upload their own materials, and create PSU and statewide hubs to share resources.

- Vendor: Institute for the Study of Knowledge Management in Education (ISKME)
- Contract Type: DPI purchased licenses on behalf of all PSUs
- Contract Start Date: July 20, 2018
- Contract End Date: July 19, 2022
- Contract Number: 40-IT00109-17-2
- Cost: \$325,500 (2021-2022 Academic Year)



## **PSU HR/FINANCIAL ENTERPRISE RESOURCE PLANNING (ERP) SYSTEMS**

Through the School Business Systems Modernization initiative, a software as a service RFP was issued and establishes vendors to provide LEAs more than one ERP offering based on key attributes such as the number of ADMs (Average Daily Membership), their desired processes, and cost. This RFP results in 5 years, plus 1 3-year optional renewal and 1 2-year optional renewal (a maximum 10-year contract) for each awarded vendor.

- Vendors:
  - Tyler Technologies, Inc.
  - Cherry Road Technologies, Inc.
- Contract Type: Convenience Contract
- Contract Start Date: April 18, 2019
- Contract End Date: June 30, 2024
- Contract Number: 40-IT00118-18

## **K-8 DIGITAL LITERACY CURRICULUM**

Makes available curriculum materials to support: 1) Students to learn essential digital literacy skills (including computer fundamentals, computational thinking, keyboarding, digital citizenship and online safety, Web browsing, email and online communication, visual mapping and productivity applications; 2) Teachers to assess digital literacy growth and integrate digital literacy into core and supplemental subjects using research-based frameworks; and 3) English learners as well as students with special needs the resources they need to excel.

- Vendor: Learning.com, Inc.
- Contract Type: DPI provides subscriptions for Tier 1 districts that opt-in. Convenience pricing for other PSUs.
- Contract Start Date: March 18, 2019
- Contract End Date: March 17, 2022
- Contract Number: RQ21322385

## **MATH CURRICULUM**

Makes available the Imagine Math curriculum materials to support students, teachers, and parents with math in grades 3-8, NC Math 1, and NC Math 2.

- Vendor: Imagine Learning, Inc.
- Contract Type: Convenience Contract
- Contract Start Date: July 1, 2019
- Contract End Date: June 30, 2022
- Contract Number: RQ21157495

## **LEARNING MANAGEMENT SYSTEM**

Makes available the Canvas Learning Management System for all PSUs on an opt-in basis. While this is a convenience contract, funding was made available through COVID-19 provisions to fund this purchase.

- Vendor: Instructure, Inc.
- Contract Type: Convenience Contract
- Contract Start Date: March 30, 2015

- Contract End Date: June 30, 2022
- Contract Number: RQ21139941

#### **MICROSOFT PRODUCTS**

Microsoft Enrollment Education Solution Reseller IFB for the procurement of Microsoft Education Academic Volume Licensing Software (MVLS) for the North Carolina Department of Public Instruction and all related entities defined in the IFB.

- Vendor: Softchoice Corporation
- Contract Type: Convenience Contract
- Contract Start Date: April 24, 2019
- Contract End Date: June 30, 2022
- Contract Number: RQ21209249

#### **NC EDUCATOR EVALUATION SYSTEM (NCEES)**

The NCEES system is required for use by all PSUs, however any PSU who opt-in to Home Base have access to the professional development tracking features within the NCEES platform.

- Vendor: PowerSchool, LLC.
- Contract Type: Included for all PSUs that opt-in to Home Base
- Contract Start Date: September 15, 2015
- Contract End Date: June 30, 2022
- Contract Number: NC10196522

#### **INSTRUCTIONAL IMPROVEMENT SYSTEM**

Provides the Schoolnet platform for formative assessments, including state-developed items and third-party test item banks.

- Vendor: Pearson, Inc.
- Contract Type: Included for all PSUs that opt-in to Home Base
- Contract Number: NC10475244
- Contract Start Date: July 1, 2013
- Contract End Date: June 30, 2022
- Cost: \$2,589,000 (2021-2022 Academic Year)

## APPENDIX A: COOPERATIVE PURCHASING RECOMMENDATIONS

**To:** Vanessa Wrenn, Director of Digital Teaching and Learning, NCDPI  
**From:** Mark Samberg, Assistant Director of Technology Operations and Development, Friday Institute  
Shaun Kellogg, Senior Research Scholar, Friday Institute  
**Date:** August 1, 2019

# Cooperative Purchasing Recommendations

The Friday Institute is pleased to submit the Cooperative Purchasing Recommendations Report, which summarizes our recommendations for the establishment of the development of a collaborative purchasing and collaborative vetting process to support districts in identifying, selecting, and procuring digital content. The recommendations are based on an assessment of district and charter school needs for digital content procurement undertaken during the 2018-2019 school year with input from educators at different levels from across North Carolina. The recommendations are grouped into three main categories: collaborative vetting, collaborative procurement, and supporting robust digital content ecosystems.

###

The mission of the William & Ida Friday Institute for Educational Innovation at NC State's College of Education is to advance education through innovation in teaching, learning, and leadership. Bringing together educational professionals, researchers, policy-makers, and other community members, the Friday Institute is a center for fostering collaborations to improve education. We conduct research, develop educational resources, provide professional development programs for educators, advocate to improve teaching and learning, and help inform policy-making.

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# Cooperative Purchasing Recommendations

Over the course of the past year, the Friday Institute team has engaged with over 200 educators and school/district leaders from across the state to help chart a path forward towards a cooperative purchasing model for North Carolina. The recommendations described in detail below are based on these interviews and a review of existing models from across the country. These recommendations employ the following "guideposts" to prioritize structure a path forward:

- **Districts indicate the need for funding flexibility** to be able to purchase both content and professional learning services that support the implementation of the content. Implementation of a new content or curriculum is much more likely to fail if it is not accompanied with an aligned professional learning effort.
- **Districts ultimately want to decide the content that they use** but desire state support in vetting content and ensuring alignment to standards. Districts do not have the capacity to do this on their own and need support from the state in the form of expert reviews and tools.
- **Districts want feedback from other districts** about content packages before they make a decision.
- Digital content **funding is primarily directed at supplemental materials**. Districts report that despite a wish to invest in more primary materials, they have not been doing so. They also report that teachers have been turning to the Internet, including Pinterest and Teachers Pay Teachers, to locate content.
- **Teachers appreciate and insist upon the flexibility** that comes with being able to find, select, and use the content that they feel works best for their students. However, teachers also indicate the need for readily-available, high quality instructional materials.
- District curriculum leaders report that **much of the content that teachers are using is often below grade-level standards**.
- **Many districts do not have a plan to select content** without avoiding duplication, nor do many districts have a plan to evaluate content for effectiveness before renewal.
- **Many schools and districts are overwhelmed by what they currently have**, and are looking to re-evaluate the content they are using to ensure that they are only picking effective content.

Therefore, it is our recommendation that collaborative purchasing be addressed as three components: collaborative vetting, collaborative purchasing, and continuation of the OER initiatives/supporting districts in building a comprehensive content ecosystem.

## Collaborative Vetting

While districts reported high interest in the cost-savings that could emerge from collaborative purchasing, most of the conversations that we have had with districts focused on the need to identify and select high-quality content for purchase or adoption. Additionally, while there is a question on the DLMI about software tools in use, the state lacks actionable data about what content schools are using (and by extension, what tools would be potential targets for a convenience contract). Based on feedback from the districts, we recommend that collaborative vetting be approached from three fronts: expert reviews for content, dissemination of reviews from schools and districts, and development of tools to support local vetting.

## Expert Reviews

We recommend that the Department develop or contract with an existing vetting service to review digital content on behalf of schools and districts. Durham-based EdReports, for example, is a non-profit service used by several states — however their current process aligns to Common Core and not to state standards. The catalog is also fairly limited at this point.

At a minimum, this reviewing service should assess the following characteristics:

- Alignment to North Carolina-specific standards
- Grade-level appropriateness
- Use of effective instructional practices
- Technical design and effective use of technology tools
- Reporting capabilities
- Technical interoperability including SIS integration
- Assessment
- Support for personalized pathways
- Accessibility and support for students with special needs and learning differences (including alignment to the Universal Design for Learning framework)

The service provider should evaluate digital content and make these reviews available to all LEAs and Charter Schools in the state.

The service provider should also provide training modules for LEAs and Charters on how to read the reviews and use the reviews to support the purchase of effective content. Additionally, the service provider should make their instruments freely available statewide and provide training to evaluate content packages not currently in the database. It is recommended that districts/charters be able to share locally-completed reviews across the state to support the development of a robust catalog.

## Nebraska Instructional Materials Collaborative

Nebraska school districts have local control over curriculum and instructional materials decisions. Nebraska's Department of Education runs the [Nebraska Instructional Materials Collaborative \(NIMC\)](#); its website lists K-12 instructional materials for math, science, and ELA that have been reviewed by a third-party, EdReports, to support districts efficiently finding high-quality, aligned materials. The NIMC website provides a snapshot summary of the EdReports review and links to the comprehensive review on the EdReports website. As EdReports reviews materials for alignment to Common Core State Standards, the NIMC recommends that districts review selected materials for alignment to state standards and provides minimal guidance to this end. The NIMC does not recommend particular instructional materials or vendors.

## District Reviews

Throughout the data collection process, districts expressed an interest in being able to discover which tools other districts were using as their opinions on their effectiveness (there were multiple references to an "Amazon-style reviews page"). We recommend that the Department develop or contract with a service to collect these data from LEAs and charter schools. Raleigh-based LearnPlatform, for example, is a company that provides this service, and is used by several states and NC districts. At a minimum, this service should include the following:

- A place for districts to specify the content packages they are currently using
- Quality assessment and satisfaction data from teachers, students, parents, principals, and curriculum leaders
- A searchable database of products and a list of which districts are using them
- A snapshot of ratings for each product

Ideally, the system would also be able to store pricing terms and contracts in a searchable way to facilitate group purchasing and contract piggybacking.

## Wake County Public School System

Wake County Schools uses the LearnPlatform to help schools identify what they can and cannot purchase. A Chrome extension installed on each student device tracks usage of instructional content tools and reports analytics data back to the LearnPlatform. Teachers can also use the platform's review rubric to rate the digital tools that they use in their classrooms. From these data sources, principals can quickly know which tools are being used and which are not to help. They also know which tools teachers perceive to be valuable and which they do not. By aggregating these reviews across the district, schools looking to purchase new products can review data from other schools. WCPSS central services also uses these data and expert reviews to classify which products the district will buy, which products schools may buy with discretionary budgets, and which tools may not be purchased. This classification is also accessible when accessing a content tool through the LearnPlatform tool.

## Providing a Suite of Tools for District Use

Beyond tools for evaluating alignment to curriculum and reviewing data from across the state, districts need tools to help identify local content needs and then evaluate products and content against those needs. Therefore, it is recommended that the State select or develop a suite of tools to support evaluation of digital content against local contexts. At a minimum this would include tools for districts to:

- Continue to refine and encourage the use of the [NC Digital Learning Progress Rubric](#), and the [Quality Review Tools for Digital Learning Resources](#)
- Assess digital content needs based on district data
- Review digital content for cultural responsiveness and appropriateness within the local community
- Review and respond to current literature and community concerns about screen time and use of digital resources
- Evaluate the effectiveness of digital content in supporting priority outcomes within a district and use this information to drive decisions about maintenance and renewal

In addition to developing and curating a suite of tools to identify and select high-quality digital content, we recommend that ongoing professional development is provided to schools in districts in order to develop a robust digital content ecosystem. This may also be integrated into other professional learning experiences such as the Superintendents Academy and the NC Digital Leaders Coaching Network

## Collaborative Purchasing

While districts are interested in pursuing collaborative purchasing for digital content, there is insufficient data about which tools should be included in a potential collaborative purchase. Collaborative vetting will provide the state better insight into which products districts are using, which are high-quality, and which may be potential targets for collaborative purchasing. Districts expressed very little interest in the state procuring content on behalf of districts. Therefore, we recommend that collaborative purchasing consist of developing tools to support purchasing best-practices, forming organic purchasing networks, and soliciting convenience contracts for content purchases.

## Tools to Support Purchasing

Districts indicated a need for support in the procurement and contracting process, specifically for ensuring that all contracts contain language to:

- Align with state law and best practice for data security
- Ensure interoperability with Home Base, including Power School, IAM, and Canvas

- Provide the data needed to conduct a robust evaluation
- Include basic guarantees for uptime and accessibility

The State can support districts and charters by creating sample RFPs and contracts along with boilerplate language that is accessible to all districts and charters. Additionally, the State could facilitate the sharing of contracts and RFPs between LEAs for various software packages (eventually transitioning to collaborative RFPs). Using a high-quality contract or RFP that has already been approved by a district legal team and a vendor could lighten the administrative load for other districts.

## Purchasing Networks

As digital content is vetted through a collaborative vetting process, groups of districts using similar products should emerge organically or through a structured system. Districts can leverage the state vetting systems to identify other districts using software products they wish to purchase. From there, districts can piggyback on existing contracts or collaboratively negotiate terms as a group. The state can support these efforts through ongoing PD and regional coaching efforts and by making data and tools available through the other structures discussed in this memo.

State procurement laws allow for two types of collaborative purchasing. A contract that was awarded by an LEA after a bid process can be used by another LEA if the vendor "is willing to furnish the items at the same or more favorable prices, terms, and conditions as those provided under the contract with the other unit or agency." Given the number of digital content tools in use around the state, sharing contracting terms in this way could potentially save districts time and resources as they would not have to negotiate with different vendors. Larger districts also tend to get better per-pupil pricing than smaller districts. If smaller districts could use contracts held by larger districts and making content easier for districts to vet and purchase will help some vendors increase their market share. Vendors are incentivized to participate as the availability of favorable purchasing terms may impact district purchasing decisions.

State procurement law also allows for bid waivers if a purchase is "made through a competitive bidding group purchasing program, which is a formally organized program that offers competitively obtained purchasing services at discount prices to two or more public agencies." A RESA, district collaborative, or professional organization, for example, could organize a bid on behalf of several districts. Any LEA could then purchase off of the contract.

## Organization for Educational Technology and Curriculum

The Organization for Educational Technology and Curriculum (OETC) is an example of a purchasing collaborative not based in a state or regional educational entity. The organization, a non-profit based in Oregon, operates an online store where members can purchase educational technology services, licenses, devices, software, hardware, and other goods at negotiated competitive rates. Paid membership is open to any accredited educational institution, including private institutions, from Pre-K through Higher Education, as well as school districts, state educational agencies, and libraries. OETC issues nationwide RFPs on behalf of members and reviews submitted proposals using a rubric. Contracts are awarded to the vendor with the lowest qualifying bid. Currently, one charter school in North Carolina is a member.

## City of Jacksonville and NCLGISA

The North Carolina Local Government Information Systems Association and the City of Jacksonville have partnered in order to create a convenience contract for Cisco networking equipment and services. Jacksonville is the lead purchasing agent for the contract and NCLGISA is the organization that is the purchasing group. Any organization in North Carolina can purchase using the terms and conditions in this contract if they choose to do so. Under state law, use of the contract is voluntary and subject to approval of the local boards of education.



## Statewide Convenience Contracts

As with local consortia, statewide convenience contracts allow districts to purchase by leverage a centralized bidding and contracting process, reducing the expense of legal reviews for contracted services. It is also advantageous for smaller districts and charter schools as they are able to get pricing that is typically reserved for larger LEAs.

During the research phase of this project, we were unable to identify any data sources that would suggest targets for convenience contracts, nor were we able to identify sufficient review criteria. However, the vetting systems proposed in this document will allow the state to collect the data needed to identify high-value targets for convenience contracting. Once sufficient data has been collected on the quality of various digital content tools as well as the tools commonly used throughout the state, we recommend that the Department establish convenience contracts with vendors of high quality, high-interest instructional materials. We recommend that this process begin with an open RFP that any vendor of instructional materials may respond to. The RFP should require the following, based on a review of the textbook contracting process as well as the Friday Institute's earlier publication, [Selecting Digital Education Content: A Guide for Schools and Districts](#):

- A high-quality score in each of the two vetting systems
- "Most Favored Nation" pricing for all LEAs
- Professional development and implementation support
- PowerSchool, LMS, and NCEdCloud IAM integration
- Requirements for comprehensive data reporting and analytics to support robust evaluation
- A robust, secure, and managed technical architecture

Any vendor who meets the requirements of the RFP and agrees to a convenience contract should be added to support districts, effectively forming a purchasing catalog for districts to use. This process is similar to the existing [Statewide Term Contracts](#).

## Supporting Robust Content Ecosystems

The schools interviewed for this project indicated that the content teachers used was a mixture of free and open content, purchased content, and teacher-created materials. There is much work to be done in supporting districts in moving from one-off or small collections of instructional materials to a high-quality, coherent curriculum. Districts also need ongoing professional learning to determine how to develop a robust content ecosystem that best implements paid content, Open Educational Resources, and teacher-created content.

## Continue to Leverage GoOpen NC

The GoOpen NC OER initiative is one tool to support the assembly of robust curricula. The platform allows for OER content to be found, remixed, and reviewed in the platform. Teachers can also easily export content to Google Classroom and Canvas. We recommend that the Department continue to support GoOpen NC, to ensure usage throughout the divisions within the Department, and to support efforts to load content into the system. This includes:

- Continuing to import OER libraries into the platform
- Ensuring all digital content created within NCDPI is added and distributed through GoOpen NC
- Supporting migration of content from districts with large repositories of materials into GoOpen NC
- Enabling North Carolina partners such as UNC-TV, museums, and the North Carolina School of Science and Math to load content into GoOpen NC
- Creating incentives and ensuring a smooth process for teachers to store content in GoOpen NC
- Support district professional learning efforts on the GoOpen NC platform, specifically with respect to evaluating, remixing, sharing, and assembling collections of content
- Continuously review content within the GoOpen NC platform to ensure high-quality alignment to standards

## Support Networks to Assemble Curricula

Each summer, districts and charter schools across the state work to vet and assemble content into coherent curricula and pacing guides. Districts indicated that this work was a significant strain on financial and human resources within the district. There was strong support for a state role in this process, potentially serve to connect districts and foster collaborations across the state. In addition to convenings, GoOpen NC allows for the assembly of collections which could support and streamline this work.

### Engage New York

EngageNY is a tool created by the New York State Department of Education in order to support implementation of the Common Core in New York. The state procured the lesson plans and the development of instructional support materials which were made available for free to all teachers in the state of New York. Districts in the state have access to the content and can suggest changes to the content, but ultimately it is a resource that is procured or developed centrally and then made available widely.

### TIP Consortium

The Innovation Project (TIP) is a collaborative of over two-dozen school districts in North Carolina. In response to teacher shortages and a demand for more online classes, the TIP consortium started a virtual content development collaborative (Virtual Academy). The goal of the Virtual Academy was to curate content for all standards for a course such that a teacher could quickly and easily assemble a complete, robust online course useful in a variety of contexts (remediation, virtual schools, maternity leave, etc.). Participating teachers engaged in a two-day workshop to unpack standards for their course, and then curate interactive materials, lessons, videos, assessments, and other learning objects for each standard. The completed courses are made available through Canvas Commons for teachers to import into their courses and use. Because of the modular nature of the courses, teachers can use a single standard or an entire course based on their specific needs. To date, the VA has created courses for Math I/II/II, Biology, and English I/II.

APPENDIX B: DIGITAL CONTENT REQUEST FOR INFORMATION, 2020

September 3, 2020

**Due Date for Responses, 5:00 pm, Monday, October 5, 2020**

**TO:** Digital Content Providers

**FROM:** Jessica Dalton, C.P.M., CPPB

**SUBJECT:** **REQUEST FOR INFORMATION (RFI) #63-JGD10342**

North Carolina K12 Digital Content Contracts

NC State University's William and Ida Friday Institute for Educational Innovation requests information from vendors providing digital content to the North Carolina K12 population.

Please note that this is **not a request or offer to contract and that no award or contract will result from responses received**. However, results may be utilized to develop specifications for a future solicitation.

**Submission Instructions: Complete instructions are attached.**

**Vendors are asked to complete a survey in response to this RFI no later than Monday October 5, 2020. The survey may be accessed at the following:**

**<https://go.ncsu.edu/2020-digital-content>**

**Important Notes:**

- Each item of the Requested Information will only be visible to NC State after the Closing Date/Time.
- This RFI will be advertised at [www.ips.state.nc.us](http://www.ips.state.nc.us)

Request for Information  
(RFI)  
#63-JGD10342  
North Carolina  
K12 Digital Content

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# I. Introduction

This Request for Information (RFI) is being released by the William and Ida Friday Institute for Educational Innovation at NC State University. The goal is to gather information about existing digital content contracts with Public School Units (PSUs) in the state of North Carolina. To meet that goal, the following objectives have been defined:

1. Release this RFI.
2. Gather vendor responses.
3. Provide a report to PSUs.
4. Publish a guide for digital content purchases, including:
  - a. Evaluating the effectiveness of digital content;
  - b. Evaluating the return on investment (ROI).
5. Collect data on PSU digital content selections from survey results.

# II. Background

The William and Ida Friday Institute for Educational Innovation at North Carolina State University conducts research, develops educational resources, provides professional development programs for educators, advocates to improve teaching and learning, and helps inform policy-making.

The Friday Institute for Educational Innovation will provide each PSU with a report compiled from vendor responses to this RFI. The report will allow PSUs to make informed purchasing decisions per their local needs and guidelines. This RFI may also be leveraged to inform possible future collaborative procurement efforts, including local or regional purchasing consortia.

# III. Qualifications

NC Friday Institute for Educational Innovation is seeking vendors that have existing contracts [2020-2021 school year] for digital content with any Public School Unit in the state of North Carolina.

This **does** include any digital content that is *used for instruction*.

It **does not** include platforms and services that provide digital content delivery *only* [e.g. a Learning Management System (LMS) or Learning Object Repository (LOR)].

# IV. Information Requested

The following information is being requested from vendors about each product.

## A. Vendor Name

Official company name.

## B. Product

Official product name.

## C. Website

Web address where product is described.

## D. Product Details

### 1. Grade Level(s) Served

Specific grade levels for products listed.

### 2. Evaluation and Research Data

Please share a link to any evaluation or research data on product and educational outcomes.

### 3. Pedagogical Approach

Check all items below that are included in the product:

- Integrated Learning System
- Tutorial
- Educational Game
- Simulation
- Drill and Practice

## E. Pricing

Please share the pricing as included in the existing contract and describe what product components and services are included in the price.



## F. Standards and Compliance

### 1. Educational Standards

Is the content aligned with NC standards? [The North Carolina Standard Course of Study](#) (NCSCOS) defines the appropriate content standards for each grade or proficiency level and each high school course to provide a uniform set of learning standards for every public school in North Carolina. Use the following to describe the alignment:

- Greater than 75% professionally evaluated and aligned
- Computer/Artificial Intelligence aligned
- Computer/Artificial Intelligence aligned with human validation
- Unaligned

### 2. Authentication

Does the product utilize [SAML 2.0](#), [Clever](#), [ClassLink](#), or something else for authentication?

### 3. Rostering

Does the product support [IMS Global OneRoster](#) v1.2 for class roster data?

### 4. Analytics

Does the product support [IMS Global Caliper Analytics](#) v1.1?

### 5. Integrations

NC DPI has a statewide convenience contract for [Instructure's Canvas](#) LMS.

- Does the product integrate with Canvas?
- If yes, and the product includes assessments, does it include LTI Basic Outcomes Service for grade passback?

### 6. Security

Does the product comply with the NC data security and privacy standards as documented in the [NC Statewide Information Security Manual](#)?

### 7. Privacy

Please provide a link to your student data use and privacy agreement.

### 8. Accessibility

Please provide a link to your [Voluntary Product Accessibility Template](#) (VPAT).

## D. NC PSUs using Product

Please only select PSUs that have a current contract. Do not include expired contracts or PSUs that are evaluating.

## E. Contract Term

Please share the start and end date for the current contract.

## F. Comments/Clarifications

Use this space to share any information that would provide clarity to information provided above.

## G. Contact Information

We would like to know who is completing the survey on behalf of the vendor and how to contact them for any clarifications:

1. Full name of person completing survey
2. Position/title of person completing survey
3. Email address of person completing survey
4. Phone number of person completing survey
5. Sales contact name
6. Sales contact email address
7. Sales contact phone number

## V. Response Timeline

- Posting of RFI 09/03/2020
- Survey Open 09/04/2020
- Survey Closes 10/05/2020

## VI. Response Template

In lieu of a written response, the Friday Institute is requesting vendors complete an online survey. The survey includes the questions as presented in the Information Requested section of this RFI. The survey is designed to gather the requested information in a method that respects the vendors time and effort. Please fill out the survey **once for each product**. Thank you.

<https://go.ncsu.edu/2020-digital-content>

## VII. Questions

Please direct all inquiries about this RFI to Jessica Dalton at [jgdalton@ncsu.edu](mailto:jgdalton@ncsu.edu).

- Acronyms
- AI - Artificial Intelligence
- ARTS - Action Real-Time Strategy
- NC - North Carolina
- DPI - Department of Public Instruction
- LMS - Learning Management System
- LOR - Learning Object Repository
- NCSCOS - North Carolina Standard Course of Study
- NCSU - North Carolina State University
- PSU - Public School Unit
- RFI - Request for Information
- ROI - Return on Investment
- SAML - Security Assertion Markup Language
- VPAT - Voluntary Product Accessibility Template