CURRICULUM SUPPORT GUIDE

WORKBOOK

Key Action I.5: Procure and Distribute Materials

I.5: PROCURE AND DISTRIBUTE MATERIALS

WHAT IS THE GOAL?

The goal of this key action is to procure all necessary materials and get them into teachers' hands before training.

WHY IS THIS KEY ACTION IMPORTANT?

There is nothing more frustrating than being asked to try something new, but not being given the resources you need for it to be successful. And nothing will undermine confidence in the support a system leader promises than getting materials later than promised. On the flip side, there is nothing more fun than getting the materials, opening them, and leafing through them for the first time. Once the decision on the curriculum has been made, the first question teachers will ask is "When do I get my materials?" System leaders have a lot of options for how they can obtain different materials today. This is good because it can free up funds, but it can also complicate decision-making. Getting this step right — a step that is historically a pain for all involved — is a refreshing change and deeply investing for all involved. Hopefully you have worked this into your timeline already. If not, don't worry. Get your information together, make decisions, and communicate realistic expectations for delivery that you can meet or beat.

EXPLANATION OF LANGUAGE

We use the word **procure** to describe the process of obtaining materials. We use the word **distribute** to include all actions needed to get materials into teacher and student hands. The term **open source** here refers to materials that are in the public domain and therefore may need to be printed but will not need to be purchased. We use the word **distributor** to refer to anyone — a developer or printer or third party — that produces and shares materials.

I.5.A: UNDERSTAND YOUR PROCUREMENT OPTIONS

GUIDING QUESTIONS

i.   Who needs to be engaged in our procurement planning?

ii. What is our procurement process?

iii. For our selected curriculum, what are all the possible resources we might need?

iv. What are the priority resources?

v.   What are the options for how we could print or procure each resource?

vi. What is the unit cost for each option?

vii. What enablers (i.e. technology) will we need?

viii. What's the total number of materials needed?

NOTES

This step may involve a different set of people than the Selection Team. Procurement Responsibilities outlines all tasks in the procurement process and provides a template to organize everyone's responsibilities.

Every system will have a different context for these decisions due to state policy and local requirements. Bidding processes, board approvals, contracting options, and grant funding requirements should be thought through upfront.

In the past, textbooks were consistently purchased directly from the developer. Today, systems have more options, particularly for the open source materials. Be sure to explore all options, as they can save significant costs. Procurement Options gives an overview of the current distributors for commonly used materials.

The Materials Procurement Organization Template can help you organize the list of all possible materials.

In certain cases (more often for ELA materials), you will need to decide which units you are going to teach in order to make the procurement decisions. If that is the case, skip to **Key Action II.2: Determine the plan for assessment and grading** and return to this step as soon as you can determine the units.

Remember to account for special education teachers, ELL teachers, homebound teachers and students, and any alternative school or alternative program teachers and students.

Including extras in your initial order saves future coordination due to misreported student numbers, new students coming to the school, or migration between schools.

I.5.B: PLACE AND TRACK YOUR ORDERS

GUIDING QUESTIONS

i.   What are we are going to purchase now?

ii. Which materials do we want to procure as soon as possible? When do we think that will be?

iii. What will be the recurring costs? (Which materials are reusable, and which will be reordered each year?)

iv. How will we track all purchases through delivery?

v.   When will we need to follow up with vendors?

NOTES

Go back to the Procurement Options resource and make final decisions about purchasing.

Depending on the structure of the materials, it may be helpful to order the first unit quickly so that materials arrive sooner, and stagger the purchase of additional units.

Tracking Materials Orders is a tracking template for all materials with a sample calendar to track when to follow up with vendors.

I.5.C: COMMUNICATE A REALISTIC TIMELINE

GUIDING QUESTIONS

i.   **What will each stakeholder group want to know about the materials timeline?**

ii. **What are the key messages we want to share about the materials arrival?**

iii. **How do we plan to proactively communicate this information? Who will deliver the communication? When?**

iv. **What questions do we expect we will get? How will we answer them?**

NOTES

Ensure that you can underpromise and overdeliver on the timeline.

Go back to your Selection Plan to review your stakeholder lists.

For each stakeholder group, identify the key information that you want to communicate.

Email Communicating Materials Ordering and Distribution is a sample email that you can adapt.

Role playing (which can be awkward but equally useful) can help make sure all parties are on the same page as questions come up.

I.5.D: FORM THE REVIEW COMMITTEE AND DISTRIBUTE MATERIALS

GUIDING QUESTIONS

i. Where will we store the materials before distribution can occur?

ii. How will we inventory materials once they arrive?

iii. How will we inventory and track materials once they are distributed to schools?

iv. What information does each teacher need to record? How will they record it?

Procurement Responsibilities

This resource outlines the different procurement responsibilities and provides a template that you can use for assigning those responsibilities. It also gives a sample procurement timeline.

It's helpful to designate one person at the central office who will be the point person for procurement. Early implementers set a goal of having teachers have materials in hand at the end of the school year so that they could use the summer to learn about the materials. Most systems have found it helpful to place the order at least three months prior to the date the materials are first needed. The chart below outlines tasks and gives space to name who will complete the task and by when. At the bottom of the resource, you can see a sample timeline.

Task (with notes)	Who	Deadline
Select point person		
Meet to review responsibilities and establish division of responsibilities and timelines for all involved		
Set date for delivery to schools		
Generate procurement numbers (both for students and teachers) ▪ Add 10% of the total to allow for changes in student body numbers ▪ Include ELL and SpEd teachers		
Generate materials list for all needed materials		
Contact vendor and determine options for pricing (i.e. unit costs, bundles, shipping, etc.) and shipping details (locations and timelines) ▪ It can be more cost effective to ship to one location		
Solicit bids for printing of resources (if necessary)		
Review bids and select printing provider (if necessary)		
Contact provider and initiate contract (if necessary)		
Establish timeline for printing, delivery, and distribution (if necessary)		
Determine if materials are being purchased all at once or over time		
▪ If materials are purchased over time, set all timelines		
Set dates for district approval and board approval (if necessary) of purchase		
Establish procedure for tracking the materials		
Generate the purchase order(s)		
Identify site(s) for delivery		
Set expectations with the vendor on payment, shipping, and backorders		
Place the order		
Create and send shipment information, expectations, and training details to each school contact person		
Send email to teachers regarding timeline and expectations (see resource in Key Action I.5.C)		
Follow up with vendor to check on order process and shipping details		
Create master inventory list for each site and share with respective contacts		
Check in with vendor to verify shipping date(s)		
Verify inventory space locations have been prepared		
Reconcile any requests for additional equipment and/or staffing for each site		
Verify shipments have been received at each site		
Complete process of reconciling each shipment manifest with the materials received		

Sample High-Level Timeline

Month	Key Tasks
January	▪ Meet to determine point person, responsibilities, and timeline ▪ Collect purchase volume info (permanent, consumable, supplemental) ▪ Contact vendor/distributor

	▪ Negotiate purchase ▪ Identify shipping location(s) ▪ Generate board item
February	▪ Generate purchase order ▪ Complete order ▪ Create distribution plan ▪ Determine tracking procedure (central and school) ▪ Communicate tracking and distribution procedure ▪ Purchase tracking materials (if necessary)
March	▪ Follow up with distributor ▪ Communicate distribution schedule to teachers/coaches/admin
April	▪ Accept delivery ▪ Prepare for distribution ▪ Check inventory ▪ Settle discrepancies ▪ Re-communicate distribution plan
May	▪ Distribute materials to teachers and leaders
August	▪ Distribute materials to students ▪ Reconcile inventory

Procurement Options

This resource outlines options for procuring and printing resources. It also shares questions-thatyoucanaskdevelopersanddistributorstohelpyoumakeaninformed choice.

Although many open source solutions are available for "free," it doesn't necessarily mean that they can be implemented without some form of financial investment. With this in mind, it becomes important to weigh the options and consider several factors such as printing and shipping costs, bundle and package incentives offered by the vendors, and which materials should be considered must have, nice to have, or unnecessary. Finally, keep in mind that almost everything is negotiable. You are making a considerable financial investment and should feel free to explore every option to get the best value for the money.

Many developers allow you to purchase directly from them. Where resources are freely available, you can also contract with a printer. The chart below shares where you can find commonly used materials.

ELA Options	Great Minds - Wit and Wisdom-Learnzillion/Louisiana Guide-booksExpeditionary LearningUn-boundEd OpenUp Resources
Math Options	Great Minds - Eureka MathIllustrative Math CPM UnboundEdOpe-nUp Resources Curriculum Associates
Mass printing op-tions	Office De-pot FedEx Staples UPS

Questions to consider for developers/distributors:

- What materials are available at nocost?
- How can the materials beaccessed?
- What physical materials areavailable?
- Which materials arerequired?

- Which materials areoptional?
- Which materials areconsumable?
- What procurement options areavailable?
- If printing is an option, what is the expected printvolume?
- What bundles are available forpurchase?
- Do you offer multiple yeardiscounts?
- What are the shippingcosts?
- Are you able to ship to multiple locations? If so, are there additional coststo ship to multi-plelocations?
- Are any materials we're considering subject tobackorders?
- Will materials be able to be delivered by[DATE]?
- If custom printing will occur, will we be able to review a sample copyupfront?
- What payment options areavailable?

Questions to consider for mass printing services:

- What are your printingcosts?
- What file formats do you accept forprinting?
- Do you offer colorprinting?
- Are binding services available? If so, what are thecosts?
- Are you able to ship to multiple locations? If so, are there additional costs to ship to multi-plelocations?
- Will the printed materials be available for delivery by[DATE]?
- Would we be able to view a sample copy of the print request beforemoving forward with the fullorder?

Materials Procurement Organization Template

This resource provides a template for organizing all materials.

Guidance:
- List each resource individually (versus grouping by grades).
- Determine if the resource is consumable, which will help with re-ordering materials in the future.
- Consider vendor conditions or packages. For example, some vendors might provide one teacher edition for every 30 students.

The first 5 rows are samples. Delete as needed.

Resource	Consumable (Y/N)	Total Ordered	Back Order	Tracking Info
Grade 6: Student Workbook	*Y*	*987*	*100*	*ISBN or Item #*
Grade 6: Teacher Edition (1 per 30 students at no cost)	*N*	*33*	*0*	
Grade 6: Teacher Edition (additional copies)	*N*	*8*	*0*	
Grade 6: Consumable manipulative kit (per 180 students)	*Y*	*6*	*0*	
Grade 6: Non-consumable manipulative kit (per classroom)	*N*	*41*	*15*	

Tracking Materials

This resource provides a tracking template for all materials, along with a sample calendar for key action items.

School: InstructUp MS					**Delivery Date:** May 1, 2019			
Resource	Total Ordered	Total Received	Total Needed	Bar Code Range	Total Distributed	May 2019 Remaining Inventory	August 2019 Remaining Inventory	January 2020 Remaining Inventory
Grade 6: Student Workbook	114	114	0	193976 - 194089	109	5		
Grade 6: Teacher Edition (one per 30 students at no cost)	3	3	0	194090 - 194092	3	0		
Grade 6: Teacher Edition (additional copies)	2	1	1	194093 - 194095	1	0		
Grade 6: Consumable manipulative kit (per 180 students)	1	1	0	194096	1	0		
Grade 6: Non-consumable manipulative kit (per classroom)	5	3	2	194097 - 194101	2	1		

Vendor Contact Info:	**Purchasing Contact Info:**

	Date	**Follow-Up Steps**
Vendor Follow-Up Timeline	March 2019	1. Check that payment has been received 2. Collect and record order number
	April 2019	1. Check in on process of order 2. Confirm if any items are on backorder or will be delayed 3. Confirm shipping locations 4. If custom printing is being completed, request a sample copy for review
	May 2019	1. Verify arrival of materials 2. Report and reconcile any discrepancies in received inventory 3. Begin discussions/plans for reorder of consumable materials
	August 2019	1. After initial distribution of materials to students, contact vendor to discuss additional needs or upcoming orders based on remaining inventory

Selection Plan

This template is a place to record projects and tasks that your team will take on during selection. Modify this to a format that works for your team. At the bottom of the template, there is a list of sample projects and tasks to help you get started.

Decision-Making (set in Key Action I.1.B, Plan Your Process):

Key Decision	Who is responsible for making it?	Who will consult?

Key Stakeholders and Communications (set in Key Action I.1.E, Plan Your Process,):

Stakeholder Group	Communication Channels	Communications Needed

Schedule of Events (set in Key Action I.1.C, Map the Schedule of Events):

Key Event (include ideal selection date)	Date

Vision (set in Key Action I.2.B, Establish the Vision):

Core Beliefs (set in Key Action I.2.B, Establish the Vision):

Work Plan: Below are descriptions of some of the terms across the top row.
- Project: describes the bucket of work; many organize projects by key action (i.e. coaching)
- Task: describes an action step in the project (i.e. determine who will lead upfront materials training)

Project	Task	Owner	Deadline

Sample projects and tasks:

Project: Form the Review Committee
- Create role and responsibility doc for Review Committee
- Determine what roles need to be represented on the Review Committee
- Finalize criteria for Review Committee members
- Email committee to determine meeting availability
- Communicate who is serving on the committee to the system and share their role

Project: Leading the Review
- Train all Review Committee members on the rubric and selection process
- Review materials
- Determine plan for pilot
- Make final selection decision

Email Communicating Materials Ordering and Distribution

This resource contains sample emails communicating distribution information for the school-based point person and teachers.

For school-based resource point person:

Hello X-

We are excited to able to provide these materials to the teachers and students. During procurement and distribution, we want to make sure we take care of the appropriate measures to ensure the accuracy of each shipment and clarify the process of tracking and distribution. The following table outlines the steps and timeline we will follow in order to remain consistent across each site throughout the district.

March 14, 2019	Training for tracking and bar code process (optional)
March 30, 2019	Deadline for additional barcode/scanning equipment orders
April 15, 2019	Identification of delivery site
May 1, 2019	Delivery of materials
May 5, 2019	Deadline for reporting order discrepancies
May 10, 2019	Deadline for inventory input
May 15, 2019	Distribute materials to teachers

In order to make sure you're fully prepared to receive, check, and distribute the materials, please do the following this week:

- Check your scanning equipment to make sure you'll have enough bar codes for the materials you'll be receiving
- Determine where you can store the materials upon receipt
- Request additional inventory staff if necessary during input and distribution periods

If you haven't yet received training on the inventory process or would like a refresher, there will be a webinar on March 14th from 8:00 AM – 9:00 AM. Should you need additional bar codes or scanning equipment, you may contact <name> at <email> or <phone number> by March 30. She will be able to get you the materials you need before the shipment arrives.

The materials and resources being delivered to your school can be found in the attached inventory detail sheet. In addition to the number of units being delivered, we've also provided an approximation of the square footage needed to house the materials before distribution. Should the approximate size be larger than what your facilities can accommodate, please contact <name> at <email> or <phone number>, and he will be able to work out a suitable solution for you.

Once you've had time to process the information provided so far, please feel free to reach out if you have any questions or require any additional information. Should any of the details or dates change, we will let you know as soon as possible. Thank you so much for your commitment to this process, and I'll follow up with you in a couple of weeks to check in on how your preparations are coming along. Thanks!

For Teachers - Communicating upcoming delivery (to be sent approximately one month before delivery)

Hello Teachers,

As you know, we have been going through the process of procuring new materials for you and your students for the upcoming school year. We're pleased to announce that the materials are scheduled to be delivered to your school on [DATE], and you will be able to review the materials before the end of the current school year. We're doing this not only because we want to ensure you have everything you'll need ahead of time, but we want to allow you to have ample time over the summer to familiarize yourself with all of the materials and get an early start on planning exciting new lessons for your students. Each teacher will be receiving [INSERT DETAILS HERE, SUCH AS TEACHER EDITIONS, STUDENT COPIES, MANIPULATIVES, READERS, ETC.], and we will notify you of their arrival at your school. If you have any questions, please contact [INSERT DETAILS HERE, i.e., your instructional coach, your grade level team leader, etc.], and he/she will be happy to assist you. Thank you for all that you do for your students, and we look forward to embarking on this journey together with you!

For Teachers - Upon Delivery:

Hello Teachers,

We're excited to share that new [INSERT NAME OF CURRICULUM] materials have arrived at your schools. We're grateful for the many educators who have helped order, check, unpack, and deliver materials to classrooms. The final step is for teachers to review the materials that have been delivered to classrooms and make sure that you have everything you need. A classroom inventory list is [INSERT DETAILS, i.e., attached to this email, in your teacher mailbox, taped to the top of the delivery box, etc.].

We ask that teachers review their materials prior to the start of teacher training. As you explore the new curriculum, please take notes on the inventory list. If any materials are missing, please contact [INSERT DETAILS, i.e., your instructional coach, your grade level team leader, etc.] as soon as possible so that we can track them down. We want to ensure that every teacher and student have what they need!

We also encourage you to browse the materials and write down any questions you have. You can bring these questions to our teacher training on [INSERT DATES].

Thank you for your help!

About Us

The Curriculum Support Guide was written and designed by Instruction Partners, an education non-profit that works shoulder to shoulder with educators to support great teaching and accelerate student learning. Our work with schools and systems is grounded in the instructional core, and we provide coaching, action planning, and professional development. In the last three years, we have observed hundreds of classrooms and been fortunate to partner with many schools and school systems. We specialize in supporting smaller school systems, who may lack capacity but are able to make big changes quickly.

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Thank You

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