EASI: Working with External Providers

Overview

The purpose of this document is to provide guidance for districts and schools interested in partnering with an external provider to advance their school improvement efforts. CDE runs a Request for Information (RFI) process every year to maintain an Advisory List of Providers; providers on this list have met CDE's criteria for quality services and have provided evidence of impact or a demonstrated track record of success. This document outlines a recommended process for identifying, vetting, and establishing a strong partnership with external providers.

Why work with an External Provider?

External providers can be key partners in building lasting capacity and sustaining improvement in districts. External providers offer many services and supports that can greatly accelerate a district or school's improvement efforts, including the following:

- Content and systems expertise
- Support in diagnosing, prioritizing, scoping, and sequencing improvement efforts
- On-site coaching to support implementation and accelerate impact
- Progress monitoring and evaluation support
- Exemplar tools and strategies to help establish excellence in implementation
- Connections to models of successful turnaround in other settings (statewide and nationally)
- Facilitating networking and connections with other schools and districts

Getting to Know Approved Providers

Districts and schools are encouraged to get to know approved providers to see if they can support the intended work and serve as capacity builders. There are several ways to learn more about our approved providers: our **CDE Advisory List of Providers website** gives provider lists which include their proposals as well as examples of work with other districts and schools. We also encourage you to reach out to providers directly to learn more about their services and initiate discussions on your site's needs.

- Review authentic work products from the provider's work with other districts and narrative descriptions of the provider's services.
- Explore the list of field-validated expertise areas to find providers who specialize in particular improvement contexts or concerns.
- Browse the provider lists:
    - CDE Advisory List of Providers
    - School Turnaround Leadership Development (STLD) providers

Selecting an External Provider

1. **Begin by clearly defining what is needed from the external provider** (i.e. the services and level of support needed).
2. **Create a selection team and review local policies.**
    - Work with a small team to review providers.
    - Understand which, if any, district policies may influence the process.
    - *If necessary according to district procurement policies or if engaging in a longer partnership, use an RFP (Request for Proposals) process.*
3. **Vet potential providers.** Conducting a thorough process for vetting providers is a key part of selecting a provider that will fit your needs. While CDE has assisted by curating a list of approved providers in the CDE Advisory List of Providers, the local context and "fit" of a partnership is important. We encourage teams to have conversations with providers, ask questions, and determine if the provider can fulfill the needs of the school or district and serve as an effective partner.
    - Consider conducting initial conversations with potential providers. Providers are willing and able to meet with interested sites – *reach out!* Their contact information is included in their "Form A" link on the Advisory List of Providers.
        - Is there a rapport with the provider? Can they fulfill the needs of the school or district?
    - Ask for references.
        - Providers on the CDE Advisory List of Providers have all had references checked, but it may be helpful to reach out to a prior client to ensure alignment for the local context.
4. **Reach an agreement on what services or support are needed.**
    - Request a draft Scope of Work or quote.

Required Documentation: Draft Scope of Work

Any purchased service, including partnership agreements with an external provider, that is supported with EASI funding must have supporting documentation that enables reviewers to determine if the budget expense is aligned to the respective EASI service and if the service is an allowable and reasonable and necessary cost.

Scopes of Work must include:

- Cost breakdowns for services (detailed line items, costs per person/school as appropriate, costs by deliverable or service element, etc.)
- Details related to the schools or program served
- Timeline for services with clear deliverables or outcomes by fiscal year (July 1 – June 30)

For additional guidance on Scopes of Work, see the EASI Provider Scope of Work Guide, available on the EASI Resources and Technical Assistance page.