

Provider Selection Guidance Tool

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Prepared for the Bill & Melinda Gates Foundation by
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Purpose

The Provider Selection Guidance Tool helps a school district team evaluate the fit of potential technical assistance providers, program developers, or intermediary organizations (referred to hereafter as providers) with district implementation goals and needs. This tool can also be used by state and regional education agencies.

LEARNING QUESTION 1 OF 3:



INSTRUCTIONS

When to Use

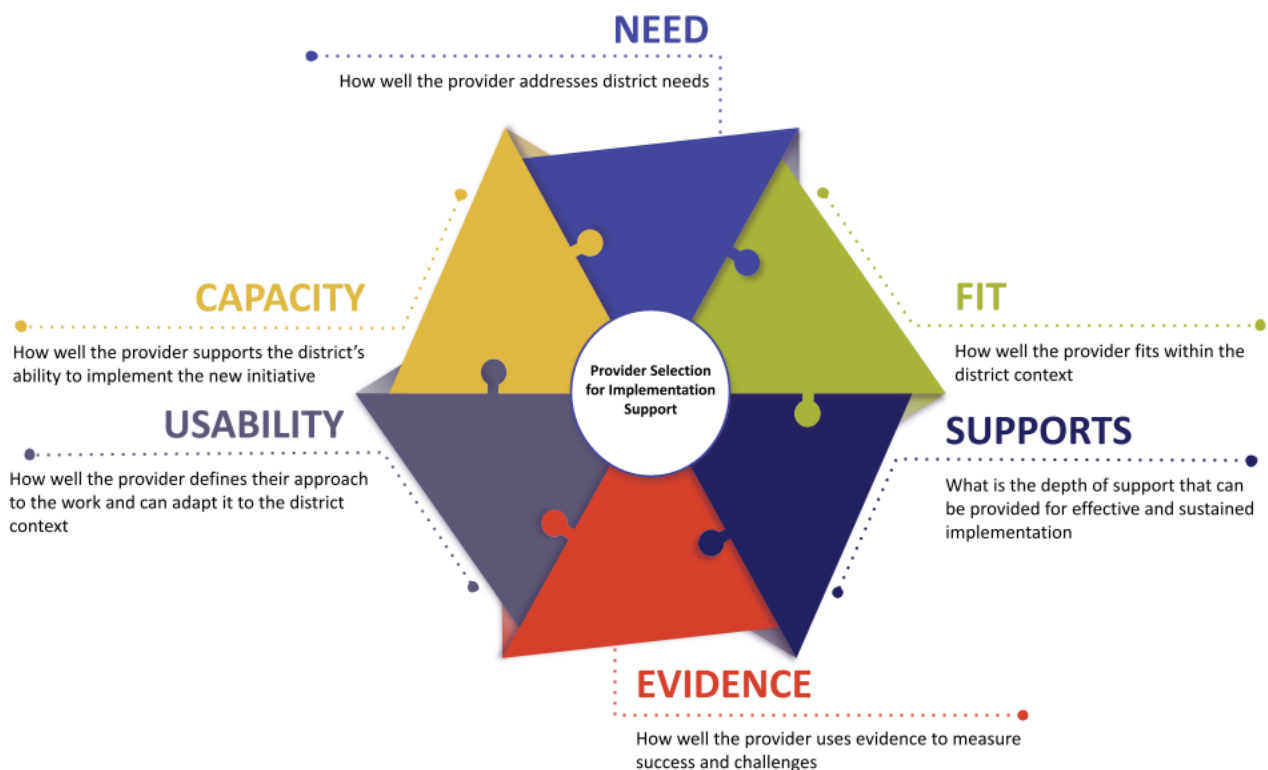
The Provider Selection Guidance Tool can be used at any stage in a program's implementation to determine the support needed for a program or practice. **It is recommended for use after a program or practice has been identified, and the district assesses their needs for partnership support in implementation.** Districts may also revisit the tool for ongoing assessment and to strengthen partnerships.

How to Use

Using the guiding questions, districts can systematically assess the provider based on the following factors:

- **Need:** How well the provider addresses district needs
- **Fit:** How well the provider fits within the district context
- **Capacity:** How well the provider supports the district's ability to implement the new initiative
- **Evidence:** How well the provider uses evidence to measure success and challenges
- **Usability:** How well the provider defines their approach to the work and can adapt it to the district context
- **Supports:** What is the depth of support that can be provided for effective and sustained implementation

To help districts tailor this process to their needs and context, additional questions for each factor have been provided in the appendix (e.g. add questions or swap existing questions from appendix).



BEFORE, DURING, & AFTER

The checklist below outlines actions to consider before, during, and after using the tool.

Before

- [Form/use a cross-representative team](#) to lead the review and selection process
 - Ensure a variety of perspectives of those impacted are represented and engaged on the team, including community representation
 - Ensure decision-makers are on the team
- Identify needs for the provider to address through specific services
 - Identify specific content areas and/or the [practice/program needing support](#)
 - Identify specific services needed (e.g., coaching, professional learning, data support, etc.)
- Identify and secure potential funding sources for this work
- Examine what initiatives are happening in your district that connects to this work
- Review existing policies, laws and/or regulations affecting the selection of providers
 - Timelines/time constraints
 - Union guidelines (as applicable)
 - Approval process(es)
- Determine a process for identifying providers that meet selection criteria
 - Utilize the Provider Selection Guidance Tool for all potential partners
 - OR
 - Interview potential partners and create a shorter list to review

During

- Utilize the tool to evaluate the Need, Evidence, Fit, Usability, Supports, and Capacity and to determine the strengths and gaps of services for each provider
 - Consider how the provider may or may not work with additional providers, program developers, or intermediary organizations in this work
- Conduct risk analysis of selected provider to determine potential risk(s) in partnering with the provider
- Conduct follow-up interview based on lingering questions
- Conduct reference checks on providers being discussed
- Utilize information from the tool, interviews, reference check, and risk analysis to determine the top choice to move forward for approval
- Create a written summary of the selection process and findings for transparency and accurate reporting

After

- Co-create and formalize a partnership agreement
- Revisit, revise, and communicate initiative alignment with the selected provider and their services
- Build an implementation plan to include
 - Instructional vision & theory of action
 - Logic model
 - Goals and/or benchmarks
 - Implementation steps (Professional learning, coaching, data collection - implementation, capacity, scale up, outcome, perception)
 - District Implementation Team roles and responsibilities
 - Provider roles and responsibilities
 - Selection process for initial implementers
 - Scale-up strategies and decision making
 - Bidirectional communication

GUIDING QUESTIONS

For each factor, guiding questions are presented to ask each potential provider.

NEED

How well the provider addresses district needs

As a provider/purveyor/intermediary organization:

1. How do you provide direct services to select, train, and coach staff and to measure implementation quality?
2. How do you support developing the district's internal capacity to select, train, and coach staff as well as to measure implementation quality?
3. What is your approach to supporting educational equity? What has been the measurable impact of this approach?
4. Have you worked with districts of similar size, identified needs, or served a similar population demographic?

Additional Questions and Notes:

Ratings

Based on the provider's responses to this factor, rate your level of confidence in selecting this provider:

2 - Select with confidence

1 - Select, but follow-up is needed

0 - Do not select or select with little confidence



As a provider/purveyor/intermediary organization:

1. How does your vision align with the district's philosophies, values, and beliefs?

2. What steps do you take to learn and understand a local district context?

3. What is your approach to addressing alignment, i.e., intersections between your scope of work and existing district initiatives/priorities (e.g., coaching systems, fidelity/integrity measures)?

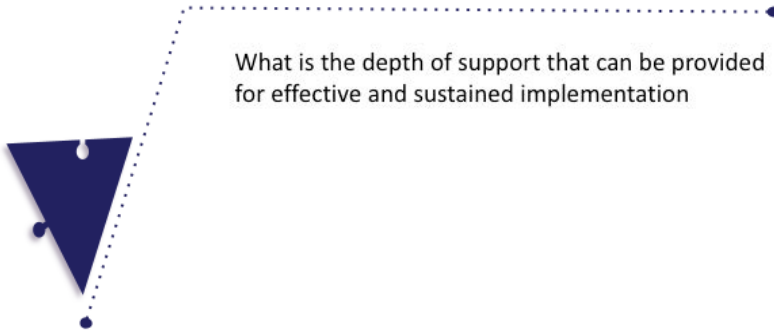
Additional Questions and Notes:

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SUPPORTS



As a provider/purveyor/intermediary organization:

1. Please describe specific services you provide related to professional development? (e.g., training, coaching, practitioner selection guidance, measuring progress, etc.)
2. What is a typical level/range of scheduled contact offered to districts?
3. How do you differentiate supports at (a) the building/campus/site level and (b) the district level?
4. Please describe any implementation support services that incorporate sustaining district level implementation?

Additional Questions and Notes:

Ratings

Based on the provider's responses to this factor, rate your level of confidence in selecting this provider:

2 - Select with confidence

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EVIDENCE

How well the provider uses evidence to measure success and challenges

As a provider/purveyor/intermediary organization:

1. What have been the outcomes of your prior work in this area? What are some success stories? What have been prior challenges? How have you addressed those challenges?
2. What do you expect in terms of a realistic timeline for changes in student outcomes? How do you work to manage expectations about immediate results versus a realistic timeline for changes in student outcomes?
3. How do you ensure equitable collection, use, and interpretation of data?

Additional Questions and Notes:

Ratings

Based on the provider's responses to this factor, rate your level of confidence in selecting this provider:

2 - Select with confidence

1 - Select, but follow-up is needed

0 - Do not select or select with little confidence

USABILITY

How well the provider defines their approach to the work and can adapt it to the district context



As a provider/purveyor/intermediary organization:

1. What are examples of situations when you have adjusted plans or adapted support to meet contextual needs in a particular district?
2. Can you share an example(s) of other districts that have successfully partnered with you, resulting in measured improvement?
3. What core features do you consider foundational as part of your technical assistance?
4. How do you partner with external partners and community members?

Additional Questions and Notes:

Ratings

Based on the provider's responses to this factor, rate your level of confidence in selecting this provider:

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CAPACITY

How well the provider supports the district's ability to implement the new initiative

As a provider/purveyor/intermediary organization:

1. What staffing requirements are necessary to best leverage your support?
2. How do you respond to turnover or staffing changes within the school and district levels related to your scope of work?
3. What is the average annual cost to work with you as a provider? What is covered, and what is the district expected to cover?
4. What protocols are in place to facilitate effective bi-directional communication across teams?
5. How do you interface with varying teams in the district to support this work?

Additional Questions and Notes:

Ratings

Based on the provider's responses to this factor, rate your level of confidence in selecting this provider:

2 - Select with confidence

1 - Select, but follow-up is needed

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SCORING & ACTION PLANNING

Identify the provider(s) to be assessed. For each provider, write the numerical rating that best describes each indicator. No one factor is weighted more so than the others. Use the information gathered to inform the selection of a provider.

Date of Discussion:

Identified Program/Practice:

Discussion Facilitators:

Focus Population:

Discussion Participants:

Subpopulation(s):

Provider 1:



Provider 2:



Provider 3:



APPENDIX: ADDITIONAL QUESTIONS TO EXPLORE FOR EACH FACTOR

For each of the six identified factors, there are many additional considerations for selecting a provider. This appendix provides further questions that may help a district team to supplement their exploration of each potential provider.

NEED

- a. How do you gather input from critical perspectives (e.g., students, families, school and district staff) to understand the needs or priorities of the district?
- b. What steps do you take to address the needs of diverse learners?
- c. Are there materials available in other languages (e.g., for Spanish speakers)?
- d. What materials are available for students at diverse learning levels (e.g., students in special education)?
- e. What steps do you take to maintain focus on the target student population?

FIT

- a. How do you help communicate the vision or the “big picture” to staff?
- b. How do you work with the districts and schools to establish concrete short-term and long-term goals?
- c. What role might you play in supporting other initiatives or managing competing initiatives?
- d. Describe the process used to map/align district strengths and opportunities related to implementation.

SUPPORTS

- a. What types of training do you offer?
- b. How frequently do you offer training?
- c. What professional development schedules might be available (e.g., week day only, weekend, summer)?
- d. How are adult learning practices incorporated in the trainings?
- e. Can you share an example of an annual calendar or stage-based implementation guide?
- f. How often do you typically like to schedule meetings?
- g. What is your typical cadence for providing feedback?
- h. In what ways do you make yourselves available to the district? (e.g., Zoom, phone, e-mail, text, asynchronous work materials such as Google Drive, other resources like Schoology)?
- i. Is support readily available?
- j. How active are you on-site? How frequently do you conduct in-person school visits?
- k. What types of resources are available (e.g., slide decks, books, lesson plans, learning on curriculum, learning on equitable instructions, connection to other content experts, etc.)?
- l. Are materials culturally relevant/sensitive, and do they address race equity/implicit bias?
- m. How is staff agency/voice considered when developing support?
- n. What supports are provided for data analysis and interpretation?

SUPPORTS (con't)

- o. Do you participate in activities such as unit reviews, modeling of lessons, instructional rounds, in-person coaching, and role-playing?
- p. What is your role in coaching?
 - General coaching of behaviors vs. content coaching
 - Provider staff directly coach individual teachers vs. developing internal district or school coaches
 - Use of fidelity measures to inform and improve ongoing coaching
 - Developing core competencies in coaching
 - Selection criteria of coaches
- q. How do you support or align with other external teams or partners?

EVIDENCE

- a. What data and information do you regularly use, and for what purpose (e.g., what is being done by educators in classrooms and leaders in the system, how well it is being done, how much is being done, what is the result of those efforts, and what could be improved)?
- b. What types of data do you typically use (implementation data, curriculum data, etc.)?
- c. What type of data is used along the way in an informative way?
- d. What type of data is used to measure outcomes or measure success?
- e. How do you manage data and information? (e.g., collecting, sharing, analyzing, interpreting, and using for improvement?)
- f. Who do you typically collect data from? (district staff, leaders/principals, coaches, teachers, students, families)
- g. What methods do you use to collect data? (surveys, exit tickets/informal data collection, walkthroughs/observations, student work, interviews, focus groups)
- h. How do you use data to inform future practice (e.g., building out professional learning opportunities, and addressing challenges)? How do you use data in an actionable way?

USABILITY

- a. How do you gather input from critical perspectives (students, families, school and district staff) to best design or adapt experiences to fit the district context?
- b. How do you learn from and adapt to feedback from school and district staff to make future changes?
- c. How do you learn from data to change the district context?
- d. How do you work to define terms clearly, such as sustainability, implementation data, and fidelity?
- e. Would you share contact information for other districts that have successfully partnered with you?

CAPACITY

- a. How do you interface with district leadership teams who can lead the necessary changes
 - Can you support leaders in leading training and/or promoting the initiative at the district and school levels?
 - How do you support setting up a structure of accountability at the district level to move the work forward?
 - Do you provide guidance on functions that must be represented on an implementation team?
- b. How do you navigate having cohorts of staff at different points in a process, for example, teachers in their third year versus their first year of implementing a new curriculum?
- c. What processes do you use to identify existing structures and resources within the district and leverage them?
- d. How is bidirectional communication evaluated or improved over time?
- e. Are you working with other districts in our region or state? How can that be leveraged to increase our capacity?

ADDITIONAL CONSIDERATIONS

- a. What steps do you take to build relationships with teachers?
- b. What steps do you take to engage students, families, and communities?
- c. Can you facilitate networking with other groups that are working on similar initiatives?
- d. How do you help facilitate planning, so that district staff know what is coming down the pipeline?
- e. What is your typical process for thought-partnering with the district?

[CLICK HERE FOR AN EDITABLE
TEMPLATE OF THE PROVIDER
SELECTION GUIDANCE TOOL](#)

The Provider Selection Guidance Tool is an adaption of the [Hexagon Tool](#).

Metz, A. & Louison, L. (2018). The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013).