PO Box 2688
Chapel Hill, NC 27515-2688

Matthew Rascoff
VP, Learning Technology & Innovation
Phone: 919-843-5705
Email: mzrascoff@northcarolina.edu

From: Matthew Rascoff, VP, Office of Learning Technology & Innovation

[signature]

To: UNC General Counsels, CIOs, CFOs, CAOs, FADC
Date: February 18, 2016
Re: UNC Learning Technology Commons launch

The Learning Technology & Innovation team at General Administration, in partnership with colleagues in Finance and IT, announces the UNC Learning Technology Commons, a system-wide effort to increase the efficiency of educational technology procurement and to improve the quality of instructional tools we make available to faculty and students. The project launches in the UNC community next Thursday, February 25. We are writing to share background on this project, to provide context, and to ask that you encourage applications (at **unc.learntrials.com**) from educational technology providers you work with (or would like to work with).

The goal of the Learning Technology Commons is to empower UNC faculty with the best digital instructional tools available – in the classroom or online. The Commons is a system-wide effort that will curate a shared, annotated catalog of instructional technology products that are made available to UNC institutions at agreed-upon prices, under a standard set of Terms and Conditions. (These products are provided in addition to any that are currently in use, and do not replace any existing relationships constituent institutions have with vendors. We are asking existing vendors to apply to the Commons to make it easier to scale their efforts across UNC.) By accessing the **Commons** at **unc.learntrials.com** faculty members will be able to share reviews of instructional technology tools they use and learn about new tools that colleagues across the system are using to achieve common teaching and learning goals.

No money will change hands immediately with vendors selected to participate. Instead, we are asking vendors to spell out how much their products cost at different volumes and commit to ensuring they will protect student privacy and comply with relevant law and regulations. Vendors seeking to participate in the Commons must also agree to a standard set of terms and conditions that will govern their dealings with our institutions and ensure compliance with our legal and business requirements. In consultation with colleagues from ECU, NC State, UNC Asheville, and UNC-Chapel Hill, we have adapted the UNC-Chapel Hill Terms and Conditions for Procurement of Software as the terms for the Learning Technology Commons. (Constituent institutions are free to do business with vendors outside the context of the Commons, but will not be guaranteed the negotiated pricing that vendors are offering to our participants.) This model builds on the IT Department's work negotiating system-wide contracts with enterprise software vendors. Our approach will limit risk resulting from click-through terms and conditions that are often reflexively accepted by faculty, especially when they use free apps that do not go through the formal procurement process.

Faculty and staff will access the Commons to identify tools to help with their instructional challenges and expedite purchasing for their classroom, department, or school. We believe this will shorten the discovery and purchasing cycle for many instructional

technology applications. Colleagues across our system will also be able to ask questions of one another, share the tools they are using and their experiences with them, and learn from the insights of their peers. We hope the Learning Technology Commons will enable more evidence-based decisions for instructional technology, make it easier for faculty and staff to procure the instructional technology tools they need, and provide a more streamlined process for vendors.

The Commons does not replace campus procurement processes. All existing governance and evaluation bodies to select academic technologies will remain in place and no campus process is intended to be abrogated with this project. Instead, the Commons is a mechanism that faculty and staff (in procurement, faculty development, instructional technology, and other units) can use to more efficiently discover, contract for, and evaluate products from vendors who participate.

We believe the Commons will yield four distinct benefits to constituent institutions:
1. Eliminating the need to review and negotiate T&Cs with the vendors in the Commons;
2. Lowering costs through vendor price transparency;
3. Offering a knowledge-sharing community of buyers and users across the system;
4. Enabling more evidence-based decisions about education technology purchases on the basis of outcomes data shared in the Commons.

We have designed an inclusive process to build the Commons in partnership with faculty, purchasing officers, Legal, IT, and educational technology providers and are pleased to share this work with you and your colleagues. An invitation for faculty and staff to access the Commons using single sign-on campus credentials will be distributed on February 25.

Please encourage vendors you would like to apply to the Commons to visit the application site at unc.learntrials.com.

Feel free to contact me with any questions.

TIMELINE

Jan 27: UNC Learning Technology Commons Launch – applications opened to vendors
Jan 27-March 18: Rolling review of applications by a joint faculty-administrative committee
Feb 25: UNC Learning Technology Commons opens to UNC faculty and staff
March 18: 2016 Vendor application cycle closes

<u>FAQ: UNC</u>

What are the benefits of the UNC Learning Technology Commons for UNC constituent institutions?
We see four main benefits for UNC constituent institutions:
1. Procurement time savings (by asking vendors to sign on to common terms in advance)
2. Vendor cost savings (through transparent pricing)
3. Knowledge sharing among institutions and colleagues (through the online platform that powers the Commons at <u>unc.learntrials.com</u>), and
4. More evidence-based decision-making about educational technologies (through the information about the efficacy of various products that colleagues will share in the Commons)

Does this obviate campus-based selection processes?
In building the Commons we are *not* deciding which tools faculty should use for particular instructional situations. Our goal is to give faculty and staff decision makers *more information* about which tools might be best for them (through shared reviews and outcomes data on the Commons website); to make the procurement process *more efficient* (through pre-agreed system-wide standard terms and conditions); and to lower costs for both campuses and vendors (through transparent published vendor pricing and faster purchasing processes). Faculty and staff should still work through campus-based evaluation processes when they select tools for their classrooms, departments, or schools.

Is there a specific dollar amount above which the Commons terms and conditions do not apply?
No. We borrowed the UNC-Chapel Hill software terms and conditions, which apply to purchases large and small. We believe the "sweet spot" for technology solutions in the Commons is under $25,000 per year. At this level, most campuses have the ability to procure technology without an RFP. Sole source purchases of tools included in the Commons will yield the greatest efficiencies and time savings. But in some cases it will be appropriate for campuses to issue an RFP for instructional technology, and we believe having the Commons terms in place will still offer benefits with RFP-based procurements.

I work for NCSSM. Will any of these tools be relevant?
The UNC system includes two high schools, the <u>North Carolina School of Science and Mathematics</u> and the <u>UNC School of the Arts High School</u>. Both are active users of K-12 ed tech. We are thus inviting K-12 ed tech vendors to participate in the Commons. In addition, the UNC system graduates thousands of K-12 teachers each year, and provides

professional development for many more. Student teachers are often introduced to K-12 education technology tools through their training.

How long is the pricing commitment vendors will make?
The pricing commitment for new purchases is one year. There will be an opportunity, not less than annually, to update pricing for new purchases. For purchases made during this pricing commitment, the terms and conditions cap annual adjustments for renewals, if applicable.

FAQ: Vendors

What are the benefits for providers?
The Learning Technology Commons was designed with input from faculty, ed tech providers, lawyers and purchasing directors to streamline and modernize access and purchasing of ed tech. Providers can expect:
1. Increased visibility among the 20,000 faculty (all of whom will be invited to the Commons) serving 225,000 students on 17 campuses and online;
2. Published inclusion in the UNC Learning Technology Commons, making it clear to ed tech buyers across the UNC system that your company has accepted our standard Terms and Conditions, which will...
3. Streamline the purchasing process and reduce the lead time to close a deal with faculty and staff on our campuses by up to 75%;
4. Valuable learning from faculty users who share what's working for their needs and offer feedback on products.

The UNC Learning Technology Commons is built on the Learn Trials platform – a research-based, online ed tech management system designed by, with and for educators and their service providers. Learn Trials is used by thousands of educators and their institutions to discover and manage over 4,000 products. providers may to take advantage of other benefits through the Learn Trials platform by claiming their profile during the application process.

Who is eligible to apply to the UNC Learning Technology Commons?
Any software, app, game or educational technology provider is eligible to apply and seek approval to join the UNC Learning Technology Commons. Given current purchasing requirements, we expect product companies who have offerings that can be purchased, in part or in whole, for less than $25,000 per year will benefit most from expedited approvals. Local campus purchasing requirements remain in effect.

Is there a fee for vendor applicants?
No. The application is free and designed to lower costs for all parties.

Our product is free. Should I still apply?
Yes. Free products that are approved will also be visible in the Learning Technology Commons, and are subject to the same terms & conditions.

Is there any flexibility in these terms? Can a provider negotiate individual terms?

The Commons terms and conditions were designed with providers, purchasing directors and legal counsels to be inclusive, safe, and consistent across all our campuses. The terms reflect relevant North Carolina and Federal law that would be required by any contract for these types of purchases at UNC. Providers may ask questions during the process, but for fairness we are unable to change the standard Terms and Conditions for any provider.

Our product has different pricing depending on size or scope. Does the application allow us to show discount options or bulk pricing?
Yes. Providers are asked to provide UNC, through the Learning Technology Commons, with the most competitive pricing possible, as we know price is a major factor in purchases by faculty and departments. Providers should take into consideration the benefits of inclusion in the Commons that include lower costs through a streamlined purchasing process (elimination of repeated legal costs in negotiating terms with each campus), and greater market access and visibility by 20,000 faculty members across 17 campuses.

Is the pricing provided to UNC made publicly available?
No. Pricing information is shared only within the password-protected Commons. It will not be broadly advertised, nor will it be shared among providers. (The University must, however, comply with applicable laws related to public records requests.)

What are the implications of a vendor's not being selected?
Providers who are not included in the Commons – either by not completing the application or by not meeting the standards set by the University – may still do business with UNC constituent institutions on a bilateral basis. We anticipate this will be an annual competition. Those who are not selected may re-apply in 2017.

If a provider is already in use by some UNC faculty, should they apply?
Yes. Joining the Learning Technology Commons will help you reach a wider community of faculty users across the UNC system. It will allow your current users in the UNC system to share their experience with your products with their colleagues across the system. This will support collaboration among faculty and allow you to benefit from the existing usage and relationships you have built in North Carolina.

Can I save my application and come back to it?
Yes.

Can a provider ask questions about the application or terms & conditions?
Yes. There is a mechanism for questions within the application. We will keep a vendor FAQ updated on a biweekly basis at unc.learntrials.com/faqs until the Commons applications close on March 18. The platform includes online technical support via chat. Provide conference calls are scheduled for February 25, 11:30-12:30 Eastern and March 1, 11-12 Noon Eastern. This may be accessed via Zoom by clicking here. Calls will be recorded and the recordings will be posted to the Commons website.