

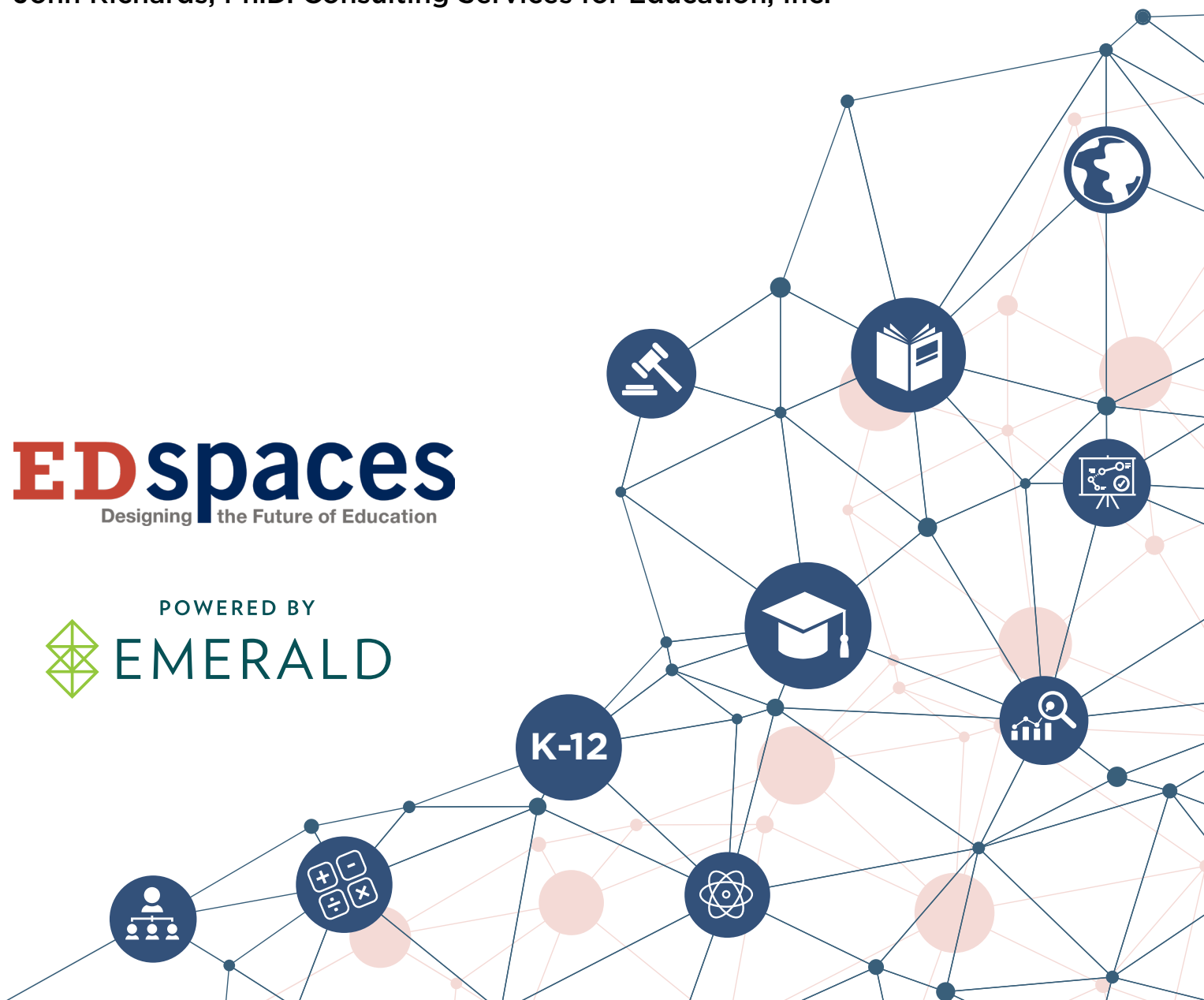
# The Future of K-12 Procurement: 4 Key Trends

An EDspaces Research Paper 2024

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Suggested Citation: Stebbins, L. & Richards, J. (2024). *The Future of K-12 Procurement: 4 Key Trends. An EDspaces Research Paper*. New York, NY: EDspaces/EmeraldX.

# About EDspaces

EDspaces is where leaders and innovators unite to drive impactful changes in schools, ensuring they are equipped with the best resources to create thriving educational environments. Through professional development and knowledge sharing, immersive tours, and hands-on experience with products, this experience expands your horizon by exploring new possibilities for school and campus learning environments.

## About the Authors

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**Leslie Stebbins, M.Ed., MLIS**, is the Director of [Research4Ed](#). She has more than twenty-five years of experience in education with a background in information science, instructional design, media literacy, and teaching. She has worked with Brandeis University as an instructional designer and research librarian and has served as a consultant to Tufts University, Facing History and Ourselves, the University of California Santa Barbara, Harvard University, and the U.S. Department of Education on issues relating to learning and technology. She is the author of numerous articles and five books including her most recent: *Building Back Truth in an Age of Misinformation* published by Rowman & Littlefield with support from the Alfred P. Sloan Foundation.

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# Forward from EDspaces/EmeraldX

EDspaces is pleased to launch this new report on important innovations in school procurement. The role of school procurement professionals is rapidly evolving and we at EDspaces are especially excited to dig deeper into the key issues that will be impacting school procurement professionals in the coming decade.

As innovators striving to support student learning through research-based learning space designs that facilitate student growth, we are excited to be helping school leaders better understand how strategic purchasing choices can impact K-12 education. School spaces are changing rapidly to reflect and support new pedagogies including collaborative learning, increased support for neurodiverse students, outdoor spaces that promote physical and psychological health, and holistic teaching approaches that prioritize student emotional well-being.

**Join us** in pursuing innovative ways to reimagine our physical learning spaces to ignite greater creativity and collaboration for our teachers and students. We are dedicated to partnering with school leaders to assist in shaping the future of education by using the science of learning to help students thrive.

This report – *The Future of K-12 Procurement: 4 Key Trends* – summarizes the experiences and insights of award-winning procurement professionals who are leading the way in enhancing and building the field of strategic procurement. We are thankful to the authors at Research4Ed and Consulting Services for Education for delving into this project and obtaining answers for the industry. And, we especially appreciate the time our school leaders took from their busy days to participate in this report. Without their participation this report would not have been possible.

**Joe Tucker, CEM, CMP**

Show Director, EDspaces

**Kevin Bienkowski**

Marketing Manager, EDspaces

# Executive Summary

Extensive phone interviews were conducted with 18 school leaders whose primary roles involved procurement. Many of the interviewees serve in leadership positions in procurement organizations and/or had recently won awards or received recognition for their outstanding work.

The following is a summary of the key trends we found during our research.

## Trend 1: Tech Tools for Procurement are “Not Quite there Yet”

- Public procurement systems for the K-12 market are currently undergoing a shakeup with recent mergers and acquisitions and dozens of players automating different components of procurement.
- The need for e-procurement tools varies greatly by school district size. More than 50% of the interviewees from small districts reported making due with basic spreadsheet software; interviewees from medium and large districts indicated they used a wide variety of tools and that the pandemic had accelerated this use.
- 89% of our interviewees expressed the desire to use more data to inform procurement decisions, but stated that they typically did not have the appropriate tools or the time to track and use data
- In the coming decade there will be opportunities for pursuing greater efficiencies by using artificial intelligence (AI) in procurement.

## Trend 2: It's Not Just About the Price

- 100% of procurement professionals from small districts indicated that buying local could be weighted more heavily than cost; 50% of all interviewees indicated that buying local could be weighted more heavily than cost.
- 100% of large school district leaders indicated that checking references, reputation, or past experience with a vendor were important factors that could sometimes be weighted more heavily than price in making decisions; 83% of all interviewees indicated that this was true.
- 61% of interviewees indicated that the best value and/or quality of a product or service could be weighted more heavily than price.

### **Trend 3: Networking is Critical for Success**

- 72% of our interviewees referenced the important role that networking plays in being a successful procurement professional.
- 78% of our interviewees stated that membership in the state ASBO provides important ways to stay up to date on state regulations, engage in professional development, and network with colleagues at conferences and meetings.
- Other professional organizations that interviewees mentioned as important were ASBO International (67%), Regional and State School Administrators and Purchasing Associations (28%), and NIGP (28%).
- Informal local networks were especially valuable in sharing information, vendor references, bid templates, and information about new regulations. Interviewees reported monthly emails and meetups, Zoom meetings, and informal listservs that they regularly participated in. 22% of our interviewees also mentioned the importance of finding a good mentor.

### **Trend 4: Tactical Recruitment to the Profession is Critical**

- Leaders in the procurement profession reported on the need to develop a stronger pipeline to the field. Procurement has shifted from simple transactions to highly complex and strategic operations. Attracting new entrants to the field will be essential in the next five years, but many people do not understand the nature of, or growing complexity of, the work.
- 100% of interviewees reported finding procurement work meaningful and fulfilling. Communicating to prospective candidates the rewarding aspects of the work can attract people who might otherwise choose private sector positions.
- 94% of our interviewees reported that they “fell into” the profession from other fields. The majority of our interviewees reported coming from careers in private sector finance (38% of interviewees) or teaching (28% of interviewees). Tactical recruitment should target potential candidates from these two areas.
- 22% of our interviewees expressed concern about the large number of procurement professionals that were near retirement or who had retired.

- Communicating to prospective candidates that a certification from a state ASBO is sufficient and that a Masters' degree is not essential could attract more candidates to the field. Only 6% of interviewees stated that a Masters' degree was needed to succeed in the job; 78% stated that a certification from a state ASBO was indispensable.
- 

School procurement work has evolved, out of necessity, from transactional to strategic. Procurement professionals must now work in larger districts; juggle increasingly complex local, state, and federal regulations; cope with reduced budgets due to declining student enrollments; navigate the rapid acceleration to online learning and e-procurement systems; monitor large infusions of federal COVID relief funding; and quickly get up to speed on complex educational technology related purchasing that entails tracking issues such as cybersecurity and student data privacy.

Procurement professionals are also paying attention to new research that is strongly connecting purchasing decisions to supporting new pedagogies and facilitating student learning and well-being. Conferences, such as [EDspaces](#), reflect the growing awareness that purchasing decisions such as classroom furniture designed to support collaborative learning, carpeting and wall tile that can minimize distracting noise, and the use of AI to promote school safety are just a few of the ways that strategic procurement decisions are tied directly to student success.

Our findings help document the increasingly complex and challenging role of the K-12 school procurement space. An overarching theme from the research is that procurement professionals are embracing change and finding ways to work more effectively in an environment that continues to present significant challenges. Better understanding of the field by external stakeholders can help provide improved support for those working in procurement and attract strong applicants to the profession.

# The Future of K-12 Procurement: 4 Key Trends

## Methodology

In April of 2024, we conducted extensive phone interviews with 18 school leaders whose primary roles involved procurement. We used a structured survey instrument to frame our interviews and to provide a deeper dive into understanding current trends and innovations in the K-12 school procurement space. (See Appendix A for Survey Instrument.)

Interviewees were selected from small, medium, and large school districts from across the US. Their job titles included: Chief Financial Officer, Assistant Superintendent of Finance and Operations, Assistant Superintendent of Business Services, Director of Supply Chain Management, and similar titles.

Many of our interviewees serve in leadership positions in procurement organizations and/or had recently won awards or received recognition for their outstanding work. (See Appendix B for a list of interviewees.) Two business managers from small districts in Nebraska and Pennsylvania received the Association of School Business Officials (ASBO) International's 2023 Pinnacle Award that recognizes innovative school business professionals for their resourcefulness and creativity. Another interviewee, from a medium-sized school district in Arizona, received two national awards from ASBO-I and the Government Finance Officers of the US and Canada for exemplary financial reporting and accountability. And yet another interviewee from a large school district in Salt Lake County Utah won the 2023 Achievement of Excellence in Procurement Award from the National Procurement Institute.

# Background

In the past decade, school procurement has transitioned, out of necessity, from transactional to strategic. Purchasing school supplies was once viewed as simply transactional: The school business manager would buy paper and pencils, monitor the budget, and have the supplies delivered. But school procurement professionals now must operate more strategically and quickly adapt to rapidly evolving circumstances. For example, procurement professionals now need to:

- Navigate increasingly complex local, state, and federal compliance requirements
- Negotiate multi-million-dollar bids
- Conduct negotiations with multiple stakeholders
- Monitor cybersecurity threats
- Ensure edtech purchase decisions integrate with existing systems
- More effectively tie purchasing decisions to student learning and well-being

Procurement involves not just a purchase, but analysis, cost management, and strong interpersonal skills.

There are many drivers for the shift from transactional to strategic procurement including an increase in school district size, budget pressures from declining student enrollment, an increasingly complex regulatory environment, and, perhaps most significantly, more complex educational technology related purchasing that entails monitoring issues such as cybersecurity and student data privacy.

More recently, the pandemic caused a rapid acceleration to online learning and e-procurement; large infusions of federal Elementary and Secondary School Emergency Relief funds (ESSER) that needed to be requested, tracked, and reported on; and significant supply chain issues. Inflation, although slowing, is still placing challenges on procurement professionals to get more creative with their purchasing decisions.

Also in the past decade, there has been rising expectations that purchasing decisions need to be more closely aligned with student learning outcomes. Conferences such as EDspaces, which started in 1996, reflect the increase in research that strongly links the design of school buildings, classrooms, and outdoor spaces to current pedagogies. Classroom furniture designed for collaborative learning, carpeting and wall tile to minimize distracting noise, and the use of AI to promote school safety are just a few of the ways that strategic procurement decisions are tied directly to student success.

During our interviews we also noted a change in the language used to describe how procurement professionals view the collaborative nature of their work. Across the board, our interviewees referred to students, teachers, school staff, parents, and school board members as their “customers” or “internal customers” who they serve. Procurement decisions are no longer viewed as solitary in-house decisions made by the school central office. We repeatedly heard about decisions being made by seeking input from various stakeholders. For example, janitorial staff were providing input on cleaning equipment, and community members were giving feedback on materials to use for replacing turf fields.

A few of the more significant contextual factors are discussed below.

**District Size Matters**

The number of school districts in the US has decreased, while the average size of districts has increased. In 1979/80 there were 15,944 school districts in the U.S.; in 2021/22 there were 13,318 districts, a decrease of 16.4%.<sup>2</sup>

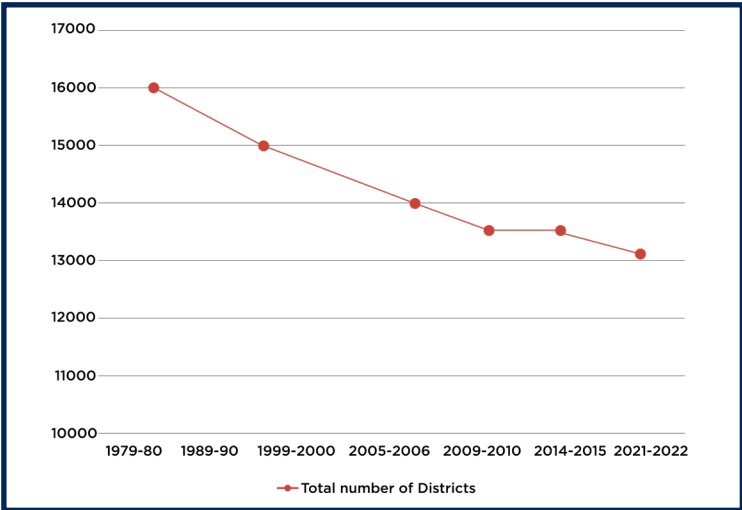


Figure 1: The total number of school districts decreased by 16.4%.

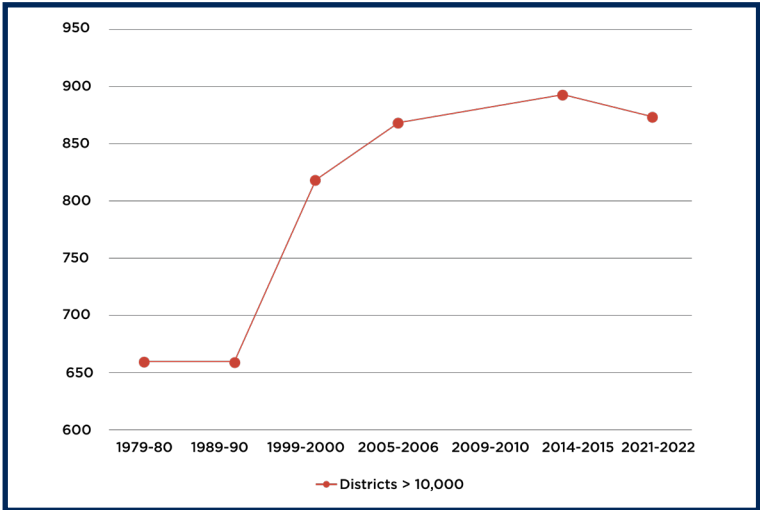


Figure 2: The number of districts with more than 10,000 students increased by 33%.

District size varies greatly between states and within states. One of the smallest school districts in the US, in rural Wyoming, has 10 students; the largest district, in New York City, has over 915,000 students. Some states, particularly more rural states, have strategically kept districts small. The average district enrollment in Montana is 354 students and in North Dakota the average is 587 students. Other states, particularly those that have more densely packed urban and suburban areas, have much larger districts. The average district size in Florida is 46,237 students and in the District of Columbia it is 44,942 students.<sup>4</sup>

*Most importantly*, while 93.4% of US public school districts have fewer than 10,000 students, large districts containing more than 10,000 students – though they make up only 7% of all districts -- contain more than half of all students (54%).<sup>5</sup>

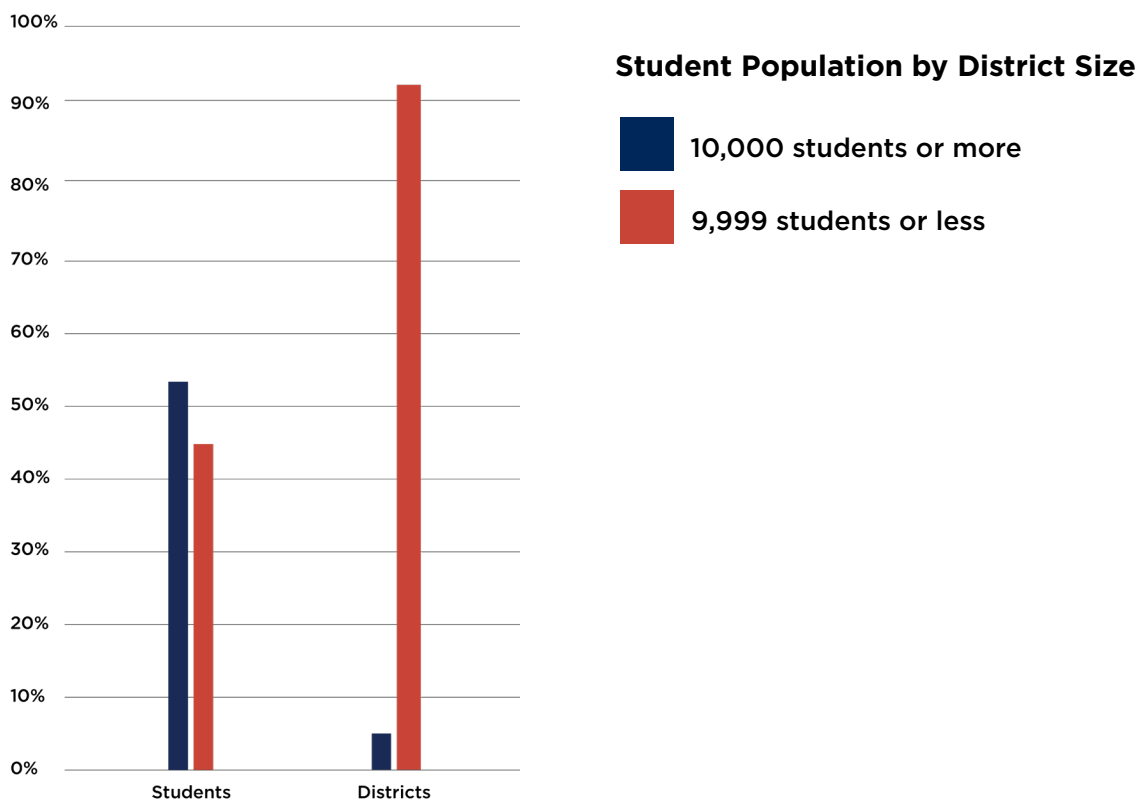


Figure 3: About 7% of districts have 54% of the student population

As a result, more procurement professionals now work in large systems with centralized departments and more staff in dedicated roles that focus on e-procurement, edtech purchasing, legal and regulatory monitoring, and other sub-specialties within the profession. However, for those procurement professionals that still work in small districts, they face increasingly complex issues such as cybersecurity and regulatory compliance while not only being the sole person carrying out procurement, but also typically having several other roles within the district.



*Small school districts, like in New Jersey, most of those districts have a business manager but you're also in charge of procurement, and you're also in charge of facilities and transportation, and you're in charge of, you know, everything! Like a one stop shop.*

-- Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ

In conducting our interviews, we had initially categorized school districts into small (Under 5,000), medium (5,000 to 10,000) and large (Over 10,000), but the majority of our respondents told us that there was a more meaningful tipping point at which procurement changed from a one-person operation to requiring a centralized office with specialized staff. This tipping point seems to occur somewhere between 8,000 and 10,000 students, and it changes many facets of the procurement process that benefit from a more centralized process. While clearly a rural school district of 8,000 in Kansas differs from the Los Angeles Unified School District of 600,000, there does seem to be more similarities than differences in how procurement activities are carried out once a school district closes in on 10,000 students. For example, membership in buying cooperatives becomes more common once a district reaches the 10,000 mark.



*Once you get up to 8,000, 9,000 students, then things have to get more centralized, there are some economies of scale. In smaller districts you are buying at a lower quantity but when you get larger, even smaller ticket items that they're buying, they're buying so much of it, that they really need a coordinated plan, because everything needs to follow a process. You need to worry about thresholds and other regulations.*

-- Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ

## **Declining Student Enrollments = Smaller Budgets**

Student enrollment is trending downward and that trend is projected to continue through 2030. From 2019 and 2020 school enrollment dropped by 3% due, in part, to COVID. And though enrollment is projected to bump up slightly post-COVID, enrollment will continue to decrease primarily due to a change in the school age population.<sup>6</sup>

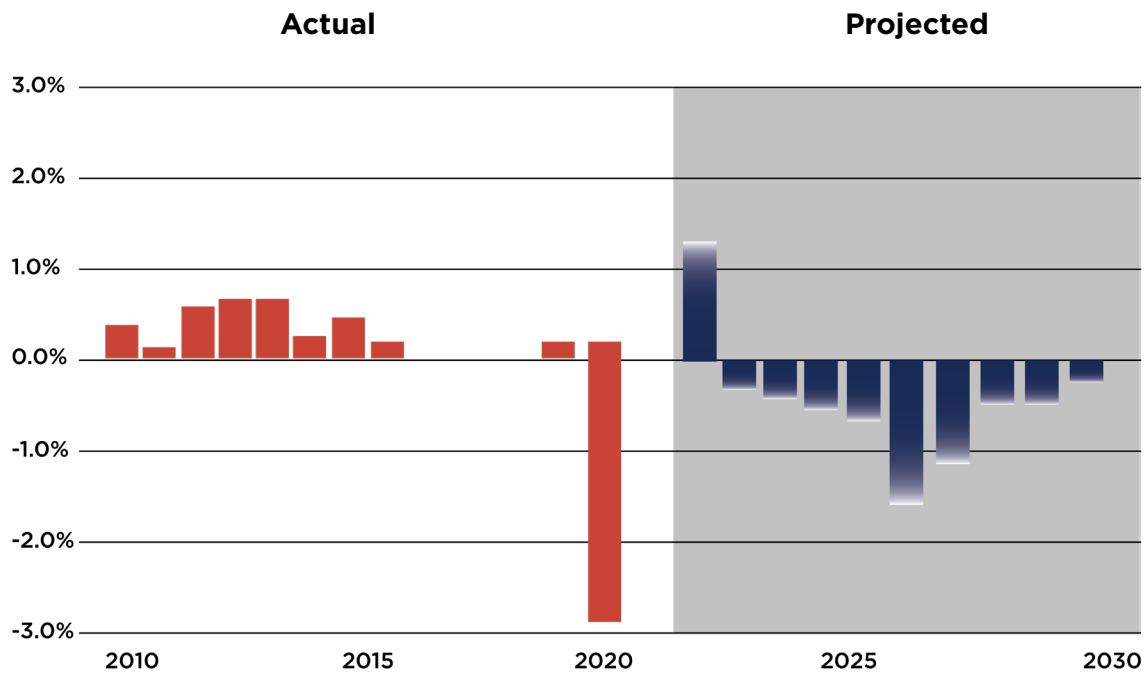


Figure 4: Annual percentage change in enrollment in public elementary and secondary schools: Fall 2010 to Fall 2030.

While Public school spending per student has increased to an average of \$14,347 in 2021,<sup>7</sup> declining school enrollments will result in decreases in school budgets. School budgets are also being impacted by the end of COVID ESSER funding, declining state budgets, and inflation. Almost 40% of district leaders predict that the loss of per-pupil funding will significantly impact their spending in the coming years. School leaders in urban districts are feeling more pinched than their rural colleagues. For procurement professionals there is a stronger push to:



optimize value



pursue grants to supplement budgets



develop stronger vendor relationships



find creative ways to make the most with more limited resources

## High Stakes and Complex Compliance Demands

While school purchasing is only about 20% of all school expenditures, procurement professionals touch almost all of a district's discretionary spending, monies that are not already allocated to set costs such as salaries. Procurement involves much more than ordering copy paper and pencils. Procurement professionals must navigate complex contracts for software, hardware, construction, and professional development.

Procurement decisions can have dire consequences. During our interviews we heard a story about a neighboring district that had faced ransomware attacks due to a poor selection of software that enabled hackers to get through firewalls and download student data. Another interviewee related a situation involving the delivery of \$2.5M worth of laptops. The procurement manager arranged with Apple to set up a highly secure off-site storage unit where the new laptops could be delivered and configured, but the truck making the delivery was stolen. Establishing who would take the loss was challenging, but to their credit Apple eventually stepped forward and replaced the computers.

In addition to the high stakes involved in procuring large amounts of equipment or services, procurement managers also have to make sure everyone involved in purchasing adheres to federal, state, and local school board regulations. When we asked "What keeps you up at night?" 89% of interviewees stated some variation on the following:



*I'm always telling people when I'm doing training that when it comes to purchasing, we're trying to keep you out of our local news stations, like "9Wants to Know" [investigative news show]. I tell them unless you can justify your decision when that TV station shows up and puts the microphone in your face, then don't do it. You are after all, spending the taxpayer's money*

-- Brenda McGee, NIGP-CPP, CPPB, Director of Supply Chain Management, Adams 12 Five Star Schools, Adams County, CO

## Pandemic-Driven Changes

The pandemic resulted in billions of federal dollars being pushed out to schools. Procurement professionals needed to apply for, monitor, and report out on these new dollars following complex federal reporting guidelines. As COVID swept through schools, learning – and procurement activities – moved quickly online. Procurement professionals needed to acquire laptops and tablets, address equity issues in connectivity, and invest in secure learning platforms and e-textbooks while coping with severe supply chain issues impacting everything from toilet paper to HVAC equipment.



*Vendors started moving online, even before COVID. There were a lot of online vendors and things that you purchase online, P-cards are great for that. Then once COVID hit, holy cow, everything moved online!*

--Bill Meekins CPPB, CPPO, NIGP-CPP, CSBO, CPCP, Purchasing Manager/Procurement Card Supervisor, Frederick County Public Schools, Frederick, MD

39% of our interviewees reported that supply chain issues continue to be a challenge, though they felt that generally things were improving, at least in some areas. Wait times for specific items continue to be excessive.



*The biggest change [in the buying cycle timeline] is the increased lead times on many items. This started during the Covid pandemic, but it appears to be here to stay... .Most items that require a formal procurement method (over \$50,000) take about a six-week period from solicitation of bids to school board approval. As of late, supply chain issues have created delays on procurement.*

--Darin Crawford, MBA, Assistant Superintendent for Support Services, Cypress-Fairbanks I.S.D. Cypress, TX

A recent NCES study found that 83% of public schools reported procurement challenges due to supply-chain disruptions during the 2022-23 school year with the most common challenges in food services, laptops and other devices, and furniture. New data suggests that supply chain issues appear to be decreasing.<sup>10</sup>

## Heavy Reliance on Coops

Cooperative buying organizations at the national and state level provide an additional layer of assistance and support to time-strapped procurement professionals. Large coops can deliver volume buying discounts to school districts. School districts relied heavily on coops for complex tech purchases during the pandemic, and continue to do so today, especially for medium and large school districts.<sup>11</sup>

83% of interviewees reported using state and federal coops; 16% indicated that due to state restrictions some national coops were off limits for them.



*We use cooperatives a lot. So that makes it easy because we don't have to go through that solicitation process ourselves because it's already been done by somebody else. This is a big-time savings. There's a couple that are fairly large that we use most often: Omnia and Sourcewell are two of the biggest ones.*

-- Brenda McGee, NIGP-CPP, CPPB, Director of Supply Chain Management, Adams 12 Five Star Schools, Adams County, CO



*We do like buying through coops because it saves us time and money.*

-- Dr. David Bein, SFO, Assistant Superintendent of Business Services/Chief School Business Official, Barrington 220 Community Unit School District, Barrington, IL

## "Green" Options are not yet Priced Competitively

Our interviewees reported that products and services that were better for the environment typically cost more than standard ones, and as a result they were not chosen. Environmental choices did come into play when there were clear short- or long-term cost savings. Three of the procurement professionals we interviewed were especially enthusiastic about the cost savings they were getting by generating their own electricity using solar panels; two mentioned that when pursuing new building or renovation projects it sometimes made financial sense to pursue green options.

28% of our interviewees mentioned their responsibilities to taxpayers and that though they would like to buy "green" products, they could not justify it if the choice came with a higher price tag.



*We are pretty diligent about how we spend the taxpayers' money. We want to make sure that we're getting the best bang for our buck and sometimes when you make choices about green facilities, it's more expensive.*

--Gregory Long, CPPO, C.P.M, CPP, CPPM, CGPP, CPDW, Director of Purchasing, Seminole County Public Schools, Sanford, FL

17% of our interviewees felt that “green” choices were starting to become more competitively priced as compared with standard choices.



*When we first started looking at a viable custodial cleaning option that stuff was a lot more expensive. We would go and take a bid and we would ask for the standard and the green solution. The first time we took that option, the green solution was so much more expensive, but now, it's much more reasonable.*

--Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ

Three of our interviewees referenced trying to buy green, but that they did not write this into RFPs or project specifications unless they were required to do so.



*The state of Maryland does have a green products requirement for custodial products, so we follow that. We do not have it written into our procedures that I'm aware of. When we build our buildings, we shoot for silver LEED. For construction, like I said, I don't think we have it in a procedure anywhere, but I think it's what we shoot for.*

--Bill Meekins CPPB, CPPO, NIGP-CPP, CSBO, CPCP, Purchasing Manager/Procurement Card Supervisor, Frederick County Public Schools, Frederick, MD  
Public Schools, Sanford, FL

# Key Trends

In analyzing the data from our interviews, four significant trends emerged.

## Trend 1: Tech Tools for Procurement are “Not Quite there Yet”



*We have VendorLink, an electronic bid site, that we have all of our bids on. We do not collect paper bids at all. We do it all electronically. We're looking into how we can make that better. We do not have an E-procurement system, if you will, but we're looking into that at the moment trying to figure out the best bang for the buck to get us up into 21st century. We're not quite there yet.*

-- Gregory Long, CPPO, C.P.M, CPP, CPPM, CGPP, CPDW, Director of Purchasing, Seminole County Public Schools, Sanford, FL

Tech tools for procurement in schools include any automated processes that provide efficiencies for tracking, requisitioning, ordering, and purchasing goods and services. They include simple services such as using Amazon or a suppliers' catalog on a website to place an order to larger procurement systems that provide either a portal to multiple suppliers where orders can be placed directly to district-wide Enterprise Resource Planning (ERP) systems.

Public procurement systems for the K-12 market are currently undergoing a shakeup with Euna Solutions (formerly GTY Technology) merging with Bonfire and DemandStar, and recently acquiring Ion Wave. There are also dozens of other players that automate different components of procurement such as OpenGov and Bidnet. In the coming decade there will be opportunities for pursuing greater efficiencies by using artificial intelligence (AI) and sophisticated platforms that can better track data to improve strategic procurement decisions.

## Tools Vary by District Size

School business managers reported to us that they use a variety of software and tech tools from simple spreadsheets to complex e-procurement systems. The need for e-procurement tools and other technologies varies greatly by school district size. More than 50% of the interviewees from small school districts reported making due with Excel or Google spreadsheet software and did not express a need for more complex systems.

Interviewees from medium and large school districts indicated they used a wide variety of tools and that the pandemic had accelerated this use.



*We started using OpenGov during the pandemic... . We can set it up and create an evaluation, we can put in the questions we want, we can do weighted or unweighted, we can assign point values, and there's the ability to put an administrative scoring in for the things that only one department used to scan or score, for something like financial stability or legal issues. ...We can add as many evaluators as we need, we can invite external collaborators. I actually have a bid right now where I have five counties who are helping us evaluate the RFP... . We can do multiple evaluations. So, if you have a round one, round two, kind of scenario, we can do that.*

--Bill Meekins CPPB, CPPO, NIGP-CPP, CSBO, CPCP, Purchasing Manager/Procurement Card Supervisor, Frederick County Public Schools, Frederick, MD

17% of interviewees reported using Peoplesoft with varying degrees of satisfaction.



*All of our purchase orders are generated through PeopleSoft, but our contracts are mostly written using templates. We have an Access [Microsoft] database that's very antiquated that we use to get our bid numbers and keep track of our contracts, but both are very antiquated and we really need to upgrade these systems.*

-- Brenda McGee, NIGP-CPP, CPPB, Director of Supply Chain Management, Adams 12 Five Star Schools, Adams County, CO

One large district that was happy with Peoplesoft also had a dedicated department of Peoplesoft programmers that work on customizing their system to meet their specific district needs. Microsoft/Microsoft Teams, OpenGov, Bidnet, JAGGAER, Lawson, Oracle (owned by Peoplesoft), IonWave and Bonfire (owned by Euna Solutions) were each mentioned at least once by medium and large district leaders in our interviews.

### Better Data Mining Tools Needed

89% of our interviewees expressed the desire to use more data to inform procurement decisions, but stated that they typically did not have the appropriate tools or the time to track and use data. Interviewees did mention tracking some basic data including enrollment, usage (for tech tools), consumption (to track supplies), and monitoring threshold amounts to adhere to regulations.



*We would like to use data to inform procurement decisions, however, we just don't have time to do a lot data mining. A lot of times we're just kind of shooting from the hip. PeopleSoft is hard to pull information from. ...We'd love to have the ability to better track spending with individual vendors because, for example, we have standing order contracts -- like some of our maintenance contracts --that we use yearly and the contracts cannot exceed \$250,000. If we were to go over that amount, we would be out of compliance. I would love to have a tool that could better track that.*

-- Brenda McGee, NIGP-CPP, CPPB, Director of Supply Chain Management, Adams 12 Five Star Schools, Adams County, CO

One interviewee had been very successful using data to track the number of copies made on photocopier machines throughout his district. By comparing different high school departments across schools he was able to point to one math department printing over 10,000 copies a week and another printing less than 4,000 copies. Through tracking and educating department heads they were able to reduce copying by 60% throughout the district, saving tens of thousands of dollars annually.

## Trend 2: It's Not Just About the Price

While several states still mandate that price must trump all other factors in purchasing decisions, our interviewees provided us with many factors that could, at times, be more heavily weighted than the price of a good or service. Buying local, quality/best value, and checking references or past experience with a vendor all heavily influenced purchasing decisions and sometimes were weighted more heavily than cost.

### Buying Local

50% of all interviewees indicated that buying local could be as important as price; 100% of procurement professionals from small districts indicated that buying local could be weighted more heavily than cost.

“

*There is still the desire from patrons to do as much local as possible. And we also get a lot of benefit from that because we get the good will of local vendors. We may pay slightly more for something but we often are, in the long-run, getting more out of it because they're donating to our programs, they're volunteering in our schools, things like that.*

-- Jason Johnson, Chief Financial Officer, Yukon Public Schools, Yukon, OK

“

*I typically go to the expert in the district. So, for example, if we want to buy a sweeper for the custodial staff, and it costs maybe \$20,000, I will rely on my building and grounds director for help. He has a network of people that he can contact to obtain three quotes so we can demonstrate to the board that we have done our due diligence, making sure that we're getting the best price. But we also want somebody local, because if that machine goes down, then we want somebody we can call right away that can come out quickly. It's really difficult to balance the purchasing protocol versus buying local.*

--Lynn Knight, CSRM, Director of Business Services, School District of Nekoosa Nekoosa, WI

## References and Reputation

100% of large school district leaders indicated that checking references, reputation, or past experience with a vendor were important factors that could sometimes be weighted more heavily than price in making a decision; 83% of all interviewees indicated that this was true.

## Quality and Life Cycle Costing

61% of interviewees indicated that the best value and/or quality of a product or service could be weighted more heavily than price.



*Sometimes just because it's the least expensive doesn't mean it's the best option. We want to look at the whole life of the product. When we have items that have more of what we call a "Life Cycle Costing" to them, we will probably put that on an RFP style solicitation. That way we can take into account factors other than price. Especially for services, because there are some intrinsic things in a service that you can't see based off of just looking at their bottom-line dollar value.*

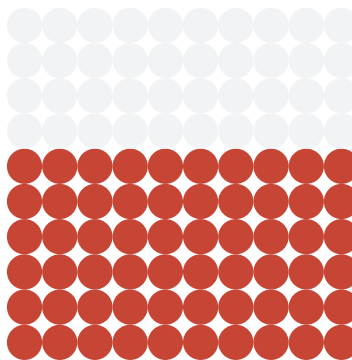
--Bill Meekins CPPB, CPPO, NIGP-CPP, CSBO, CPCP, Purchasing Manager/Procurement Card Supervisor, Frederick County Public Schools, Frederick, MD

85%



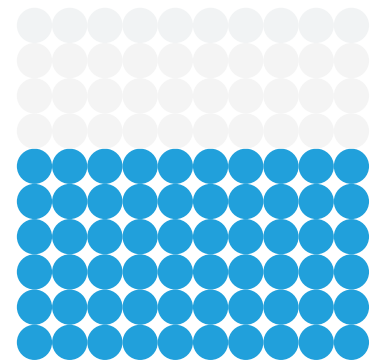
References/Reputation

60%



Quality/Value

50%



Buying Local

Figure 6: The majority of interviewees stated that references, value, and buying local were all factors that could be weighted more heavily than cost

Between 1 and 3 interviewees also mentioned availability, timing, support, responsiveness, and ability to meet student needs as additional factors that were important in making purchasing decisions that might be considered over cost.

## Trend 3: Networking is Vital for Success

72% of our interviewees referenced the important role that networking plays in being a successful procurement professional.



*One of the things that I always said was great about this profession is that we really all take care of each other. We're like one big family. We work together to improve the profession. The biggest thing that saved me over the years was to just get a network of people that you feel comfortable with because our job goes so much farther beyond what we are able to keep tabs on.*

-- Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ



*The State and International ASBOs provide really excellent professional development opportunities and are a great place for people to network. Building that network is perhaps one of the most important things that someone can do in this field. What I found, quite frankly, really refreshing and wonderful was that when I switched from the private sector people at other school districts were not competing with, and in fact, were willing to help me. And that was a lovely change from what I experienced before.*

---- Dr. David Bein, SFO, Assistant Superintendent of Business Services/Chief School Business Official, Barrington 220 Community Unit School District, Barrington, IL  
Indian Hills Regional High School, Bergen County, NJ

### Professional Organizations

78% of our interviewees stated that membership in the state ASBO provides important ways to stay up to date on state regulations, engage in professional development, and network with colleagues at conferences and meetings. The need for continuous learning will be a constant for procurement professionals as the work continues to evolve and face new challenges.

Other professional organizations that interviewees mentioned that were important were ASBO International (67%), Regional and State School Administrators and Purchasing Associations (28%), NIGP (28%), NAEP (6%) AASA School Superintendent Network (6%), and Intermediate Service Units (6%).

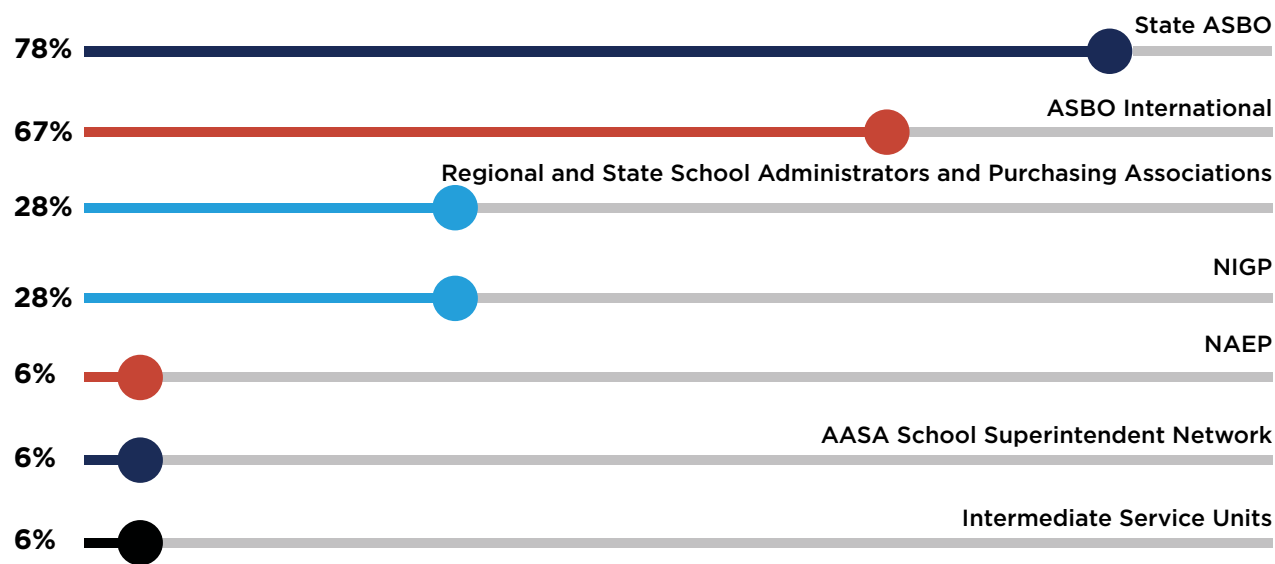


Figure 7: The majority of interviewees were members of their state ASBO and ASBO-International.

Informal Local Networks and Mentors

In addition to membership in state ASBOs, personal informal local networks were especially valuable in sharing information, vendor references, bid templates, and information about new regulations. Interviewees reported that they regularly participated in monthly emails and meetups, Zoom meetings, and informal listservs.



*You know, we're colleagues, we don't compete with each other. We don't fight with each other. Our job is to help the profession. And people are really eager to share. If you're going to put a bid out, you know, send an email out and just see if there's somebody else who's done this before. And like nine times out of ten somebody will happily just send you what they have.*

-- Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ

<sup>i</sup> Note: Many of our interviewees were recruited via state ASBOs so data on ASBO membership could be biased.

22% of our interviewees also mentioned the importance of finding a good mentor early on. They spoke of the need to have someone you trust that you run things by or that you could approach to discuss an ethical challenge. Some state ASBOs provide formal mentor arrangements for their members, other procurement professionals develop their own informal contacts. As stated earlier, our interviewees estimated that the job can take two or three years to get up to speed; state and international ASBOs and other professional organizations play a strong supporting role in ensuring success.

## **Trend 4: Tactical Recruitment to the Profession is Critical**

Leaders in the procurement profession reported on the need to develop a stronger pipeline to the field. Attracting new entrants to the field will be essential in the next five years. Procurement has shifted from simple transactions to highly complex and strategic operations. Communicating to potential entrants to the field the existence, nature, and rewarding aspects of the job is imperative.



*One of the things that I wonder about is how people find this profession, because it's one of the things that you know, you talk to people my age in this career, and you'll find that there's nobody who went to school to do this. ...I would love for people to hear about it so that we could have more talent coming in. Maybe things are changing. Maybe we're getting to a point now where people are getting interested in doing a minor in supply chain management.*

-- Jared Gardner, C.P.M., CPPO, Director, Granite School District, Salt Lake County, Utah Indian Hills Regional High School, Bergen County, NJ

We heard that helping people learn about the profession was important, but that we also need to pay attention to keeping them in the profession.



*Every month I would go to the county meeting, like Bergen County [New Jersey] with 60 districts. Every month there were new faces, like you couldn't keep track of who was in what district because it changed so frequently. ...I don't see this getting any better... and unless you want to go become a superintendent, it's the highest job you can get to and maybe that's why people leave and then the only way they can really advance is to go to a larger district.*

-- Frank Ceurvels, President, School Business Innovations/Retired Business Administrator, Ramapo Indian Hills Regional High School, Bergen County, NJ

It is unlikely that any elementary school child declares that they want to be a school procurement professional when they grow up. Only 1 of our interviewees stated that he had started his career soon after college as a school business officer. 38% of our interviewees worked in finance or similar fields in the private sector for many years before switching over to K-12 procurement, 28% were teachers, 17% started in an entry level position such as working in a warehouse, and 11% worked in a government finance role prior to entering the profession.

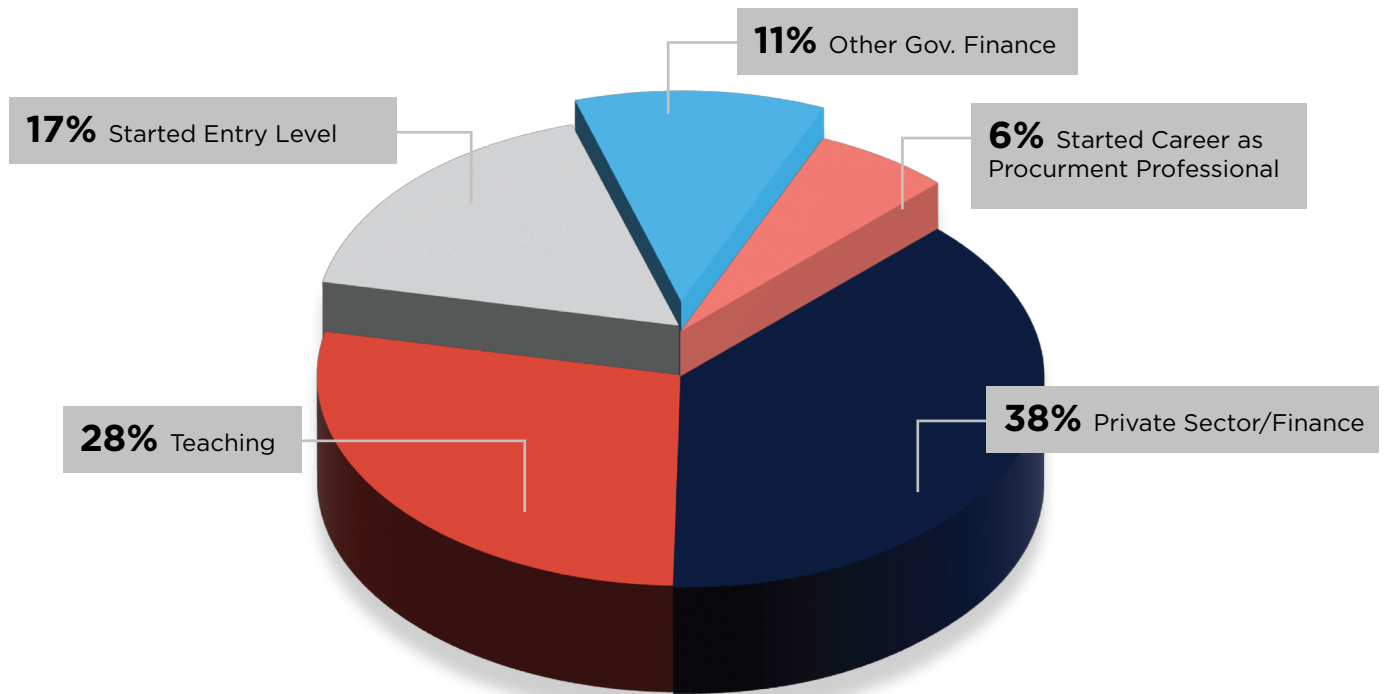


Figure 5: The majority of procurement professionals transition into the field via private sector/finance work or teaching.

Anecdotally, ASBO-I has also reported seeing an increasing number of school business leaders coming in from private sector and other government jobs in pursuit of more meaningful work, and our interviewees provided support for this assumption.<sup>12</sup>

### Meaningful Work



*Half of my career was spent in the private sector [in finance and technology], but ultimately, I decided I wanted to do something that mattered a little bit more. I really believe in the end product that we produce in public education.*

-- Dr. David Bein, SFO, Assistant Superintendent of Business Services/Chief School Business Official, Barrington 220 Community Unit School District, Barrington, IL



*Before this, I was in the personal finance space doing financial planning and then I went back to school. There's a master's program in Pennsylvania for School Business Administration that I completed and you know, it's a lot more personally rewarding doing this work than it is to chase dollars.*

-- Jesse Walck, Business Manager, Panther Valley School District, Lansford, PA

There is now greater awareness of the importance of school procurement and its impact on student learning and success. ASBO International has started partnering with K-12 schools and universities to help strengthen the pipeline for procurement positions. Communicating to prospective candidates the rewarding and meaningful nature of the work can help attract people who might otherwise choose private sector positions.

### Increasing Complexity

Procurement activities now encompass far more than ordering and delivering goods and services. Procurement professionals are expected to pursue long-term strategic plans that align with district goals, collaborate with subject matter experts and stakeholders, prioritize savings opportunities while balancing quality and life-cycle costing, speed up procure-to-pay cycles, track supplier and contract performance, and adhere to increasingly complex regulations.

With the pandemic came a rapid adoption of remote learning platforms, digital textbooks, and other digital tools. Problems with equity for students unable to access online tools also needed to be addressed. Budgetary constraints that have become more severe with inflation, and demand for new educational technology tools, have also put pressure on procurement professionals to get more creative and look not just for the best price for a resource, but to build partnerships with vendors and find ways to create long-term benefits for schools.



*We just don't have enough funds to do a lot of what it is that we need to do. So, we have to get very creative in how we do things, to the point where there's a charity about 45 minutes from here and every so often, they'll have leftover stuff and we've arranged a relationship with them where they let us know, and we say yes, absolutely! We'll be right there.*

--Jesse Walck, Business Manager, Panther Valley School District, Lansford, PA

Today there is also a greater expectation that procurement be aligned more directly with student learning goals. The design of schools and classrooms, the choice of furniture, the incorporation of outdoor learning places, and lighting and noise reducing strategies are all now factors to consider to better support students.

### The Graying of the Profession



*We have a lot of people that are nearing the end of their careers. And there is going to be a lot of knowledge loss.*

-- Jason Johnson, Chief Financial Officer, Yukon Public Schools, Yukon, OK

22% of our interviewees referenced the large number of procurement professionals that were near retirement or who had retired. A 2022 K-12 CFO Movement Study found that 33% of open CFO positions went to first time CFOs. As baby boomers retire this trend is likely to continue.

Encouraging new candidates to the profession could include communicating that Masters' level degrees are not essential and that getting certifications from a state level ASBO can be sufficient. While the job has become increasingly complex, and many of our interviewees had Masters' Degrees in business or finance, only one interviewee felt that a Masters' degree was needed to succeed in the profession. However, 78% felt that a certification from a state ASBO was essential and in some states it is mandatory. More than 50% of the interviewees estimated that, in addition to formal training and certification, it takes someone who is new to procurement an average of two to three years to get up to speed because there are so many complexities to the job.

# Conclusion

Our findings help document the increasingly complex and challenging role of the K-12 school procurement professional. Our research uncovered the need for more robust tech tools for procurement; that decisions on quality, reputation of the vendor, and buying local were often weighted more heavily than price; and that informal networking and the role of state ASBOs and ASBO International have been vital to succeeding in the field.

Procurement professionals that have been recognized as leaders in their field also reported to us the need to develop a stronger pipeline to the profession. Tactical recruitment of new entrants to the profession will be critical in the next five years. Communicating to potential entrants the existence, nature, and rewarding aspects of the job will be imperative.



# Appendix A: Survey Instrument

**Our study is focused on gaining a better understanding of the changing role of procurement professionals and gathering information on best practices. I have some topics I want to cover, but I also like to keep this a little open-ended for you to talk about things you think are most important.**

1. How did you get started in the procurement profession? What did you do before becoming a procurement professional?  

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2. What advice do you have for someone who is new to the profession? Do you recommend official training/certification for procurement staff? If so, what type and where?  

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3. What professional organizations do you belong to? What conferences do you attend?  

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4. Can you explain the approval process? How do you involve stakeholders in decision-making?  

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5. How long does the buying cycle take for you for big ticket items? Are bids under a certain amount handled differently and faster? Under how much? How fast? At what point do you need to issue an RFP?  

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6. How do you go about researching potential vendors? Where do you look? What tools do you use?  

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7. Do you make use of some kind of vendor scorecards/evaluations – how does that work/what do you use? Is it automated? Are you happy with it?  

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8. Do you make use of cooperative purchasing agencies? If so, which ones?  

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9. What tools/tech do you use to help you w/ procurement?  

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10. How do you use data to inform procurement decisions?  

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11. What is your biggest challenge as a procurement professional? (Follow-up: What keeps you up at night?)  

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12. What have I not covered that it might be important for new procurement professionals to know/understand?  

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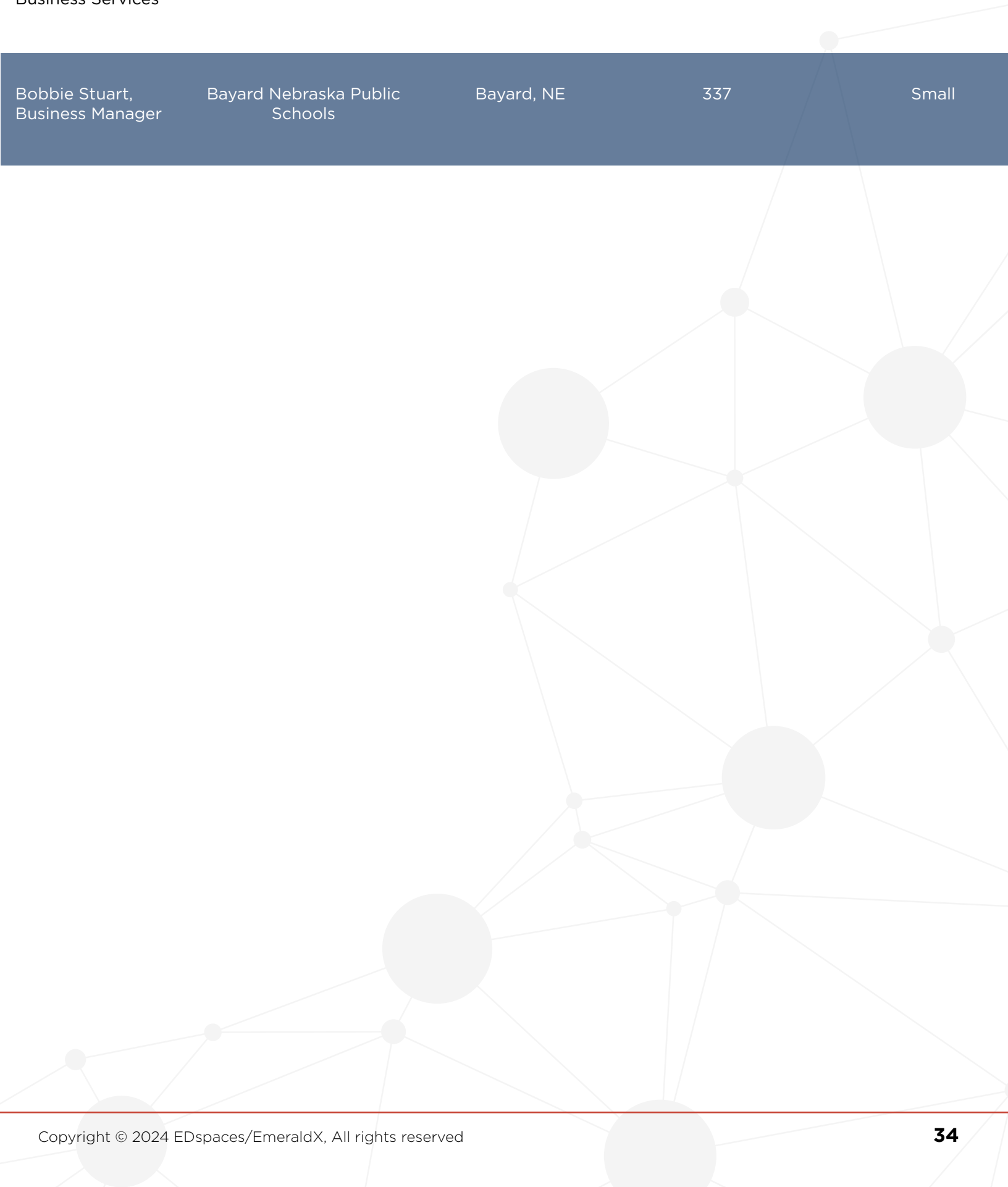
# Appendix B: List of Interviewees

Small: Under 5,000; Medium: 5,000 to 10,000; Large: Over 10,000

Name/Title	School District	Location	Number of Students	District Size
Darin Crawford, MBA, Assistant Superintendent for Support Services	Cypress-Fairbanks ISD	Cypress, TX	117,217	Large
Gregory Long, CPPO, C.P.M, CPP, CPPM, CGPP, CPDW Director of Purchasing	Seminole County Public Schools	Sanford, FL	63,000	Large
Jared Gardner, MPA, C.P.M., CPPO, Director	Granite School District	Salt Lake County, UT	62,544	Large
Bill Meekins CPPB, CPPO, NIGP-CPP, CSBO, CPCP Purchasing Manager Procurement Card Supervisor	Frederick County Public Schools	Frederick, MD	45,000	Large
Brenda McGee, NIGP-CPP, CPPB Director of Supply Chain Management	Adams 12 Five Star Schools	Adams County, CO	35,747	Large
Susan Uram, M.Ed., Educational Technology Director (Focus on EdTech Procurement)	Rockford Public Schools	Rockford, IL	27,766	Large
Derick D. Sibley, MBA, RTSBA, SFO Chief Financial Officer	Grapevine-Colleyville	76051	14,000	Medium

Tyler Moore, MBA, Chief Financial Officer	Higley Unified School District	Gilbert, AZ	13,040	Medium
David Roberts, Business Administrator	Box Elder School District	Brigham City, UT	12,572	Medium
Jason Johnson, M.Ed. Chief Financial Officer	Yukon Public Schools	Yukon, OK	9,105	Medium
David Bein, Ph.D., SFO Assistant Superintendent of Business Services/ Chief School Business Official	Barrington 220 Community Unit School District	Barrington, IL	8,173	Medium
Thomas Eldridge, MBA, Business Administrator/Board Secretary	Lawrence Township Public Schools	Lawrenceville, NJ	3,680	Small
Frank Ceurvels President, School Business Innovations/ Retired Business Administrator	Ramapo Indian Hills Regional High School	Oakland, NJ	2,906	Small
Howard G. Barber, CPA, SFO, Assistant Superintendent of Finance and Operations	Old Rochester Regional School District	Mattapoisett, MA	2,400	Small
Jesse Walck, M.A. School Business Management, Business Manager	Panther Valley School District	Lansford, PA	1,778	Small
Tim Ball, MBA, Vice President Business Administrator	SAU #88, Lebanon, NH	West Lebanon, NH	1,635	Small

Lynn Knight, CSRM Director of Business Services	School District of Nekoosa	Nekoosa WI	1,220	Small
Bobbie Stuart, Business Manager	Bayard Nebraska Public Schools	Bayard, NE	337	Small



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- <sup>6</sup> US Department of Education/NCES Table 203.10. "Enrollment in Public Elementary and Secondary Schools, by Level and Grade: Selected Years, Fall 1980 Through Fall 2031; US Department of Education/NCES. "New Project ed Data Through 2030 to be Included in Digest of Education Statistics." NCES Blog. <https://nces.ed.gov/blogs/nces/post/new-projected-data-through-2030-to-be-included-in-digest-of-education-statistics#:~:text=Specifically%2C%20Digest%20table%20203.10%20reports,to%20decrease%20another%204%20percent>
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