FREE GUIDE

The District Partnership Playbook

How small ed-tech, STEM and workforce companies land school and college partnerships

INSIDE

01 Why small vendors stall
02 How districts and colleges actually decide
03 Budgets, funding and timing
04 Your 30-day partnership plan
05 Building a target list that works
06 Outreach that gets replies
07 What to prepare before you pitch
08 Common mistakes to avoid
✓ Partnership readiness checklist

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20+ years building K-12, higher education and workforce partnerships

A companion guide to the Partnership & Pipeline Sprint

INTRODUCTION

Before you start

Most small education companies don't lose deals because their product is weak. They lose them because they talk to the wrong person, at the wrong time, about the wrong thing. This playbook fixes that.

Who this is for

- Founders of small ed-tech startups and learning platforms
- Tutoring, test-prep and academic support companies
- STEM, youth development and enrichment programs
- Career-readiness, apprenticeship and workforce training providers
- Education creators turning a course, curriculum or method into a business

How to use it

Read it once end to end, then work the **30-day plan** (Section 4) with your calendar open. The **checklist** near the end is your one-page scorecard: print it, and don't send a pilot proposal until most boxes are ticked.

Summary of skills and experience

Prentiss M. McLin, Ph.D. has spent more than two decades on the inside of K-12, higher education and workforce partnerships, as the person who brings programs in, manages the budget, and answers to the people who approve them.

- **District and community partnerships.** Built and managed partnerships among K-12 districts, community colleges, universities, employers, and workforce organizations. Engaged district leaders, educators, and stakeholders to expand participation in career-connected learning, and led partner outreach, onboarding, and hiring events that supported statewide adoption of a digital talent platform.
- **STEM and education program leadership.** Directed multi-state STEM programs serving 500+ students, educators, and partners, and scaled operations across multiple sites. Led national recruitment and partnership strategies with Minority-Serving Institutions, HBCUs, and universities to expand early-career and STEM pipelines.
- **Budgets, grants, and federal program work.** Managed program budgets of $900K and $1.1M and evaluated program ROI. Built partnerships with federal and state agencies and with grant-funded workforce initiatives, and used KPIs such as engagement, placements, and partner activity to inform growth strategy.
- **Enrollment, recruitment, and pipeline development.** Managed a higher education recruitment pipeline across multiple campuses, converting prospective students into enrolled learners, and achieved top 5% nationally in enrollment growth (President's Circle Honors). Trained staff on recruitment strategies and engagement best practices.
- **Training, outreach, and student support.** Delivered professional development and outreach that helped educators and administrators adopt instructional technology. Built school and college partnerships that support education transitions and student success, including programs for military families, and connected K-12, higher education, and industry partners around state workforce priorities.

Ph.D., Higher Education Leadership, and M.S., Public Policy & Administration (Jackson State University). B.A., Political Science (Morehouse College).

SECTION 01

Why small vendors stall

When a promising first meeting goes quiet, it is rarely about price. It is almost always one of these three problems, and all three are fixable.

1. The wrong person

Founders tend to start with whoever answers: a friendly teacher, a counselor, a principal who liked a demo. Those people can be great champions, but they usually can't sign, fund or schedule a district-wide program. The conversation ends with "I love this, let me pass it along," and nothing moves.

> **DO THIS INSTEAD**
> Map every account to four roles before you reach out: the **Champion** (wants it), the **Decider** (can say yes), the **Payer** (controls the budget line) and the **Gatekeeper** (IT, legal, procurement, privacy). One person can hold more than one role. Your job is to know who holds each.

2. The wrong time

Schools and colleges run on calendars: budget planning, board meetings, testing windows, semester starts, grant cycles. A great pitch that arrives after next year's money is committed becomes "circle back next year." A modest pitch that arrives while plans are still open gets a real look.

> **DO THIS INSTEAD**
> Ask early and directly: "When do you start planning for next year, and when would something like this need to be in the budget?" Then work backward from that answer, not from your sales quarter.

3. Features instead of outcomes

Leaders don't buy dashboards, modules or AI. They buy progress on goals they've already promised their board, students and community: attendance, course completion, credential attainment, college and career readiness, teacher retention. If they have to translate your features into their goals, most won't.

> **DO THIS INSTEAD**
> Lead with the outcome, the student group and the timeframe: "We help 9th-grade students who are off-track in Algebra I get back on track within one semester." Features come later, as proof of how.

SECTION 02

How districts and colleges actually decide

There is rarely a single buyer. Decisions move through a small group of people with different worries. Your outreach, materials and pilot should answer each of them, because the person who loves your program is rarely the person who signs.

K-12 districts: who is involved

Role	What they care about	How to show up
Superintendent & cabinet	Strategic plan goals, board priorities, public results, risk	Tie your work to a named goal in their strategic plan. Keep it to one page.
Chief academic officer / Curriculum & instruction	Alignment to standards and existing curriculum, teacher workload, evidence	Show where you fit in the instructional day and what you replace or support.
CTE director	Career pathways, industry credentials, work-based learning, employer partners	Connect to specific pathways and local employers; speak to credential and placement outcomes.
Principals	Schedule, staffing, student needs at their building	Make it easy to run: who does what, when, and how much teacher time it takes.
Federal programs director	Whether a program fits an allowable use of federal or grant funds	Explain which needs and student groups you serve; bring your evidence summary.
Technology / IT	Student data privacy, security, rostering, single sign-on, accessibility	Have your privacy policy, data practices and integration notes ready before they ask.
Procurement / business office	Policy, purchasing thresholds, contracts, vendor setup	Ask early what process applies at your price point; have vendor documents ready.
School board	Community impact, cost, accountability	Usually approves larger contracts or new initiatives; your champion presents, you support.

Community colleges & universities

On campus, academic decisions often run through **deans, department chairs and the provost or VP of academic affairs**; non-credit and short-term training often sits with a **workforce or continuing education** leader. **Career services, student success and enrollment** teams care about retention and completion. A **grants or sponsored programs office** may control funding tied to a specific award, and **purchasing** sets the contracting path. Faculty buy-in matters more than many vendors expect.

Workforce partners

Workforce training is frequently funded and coordinated through **state agencies, local workforce development boards and employers**. These partners care about placement, wages, credentials and employer demand. Show up with labor-market relevance and a clear handoff to jobs, not just training hours.

SECTION 03

Budgets, funding and timing

You don't need to be a school-finance expert. You need to know three things about each target: when they plan, where the money would come from, and who has to approve it.

How the cycle generally works

- **Planning comes well before spending.** Budgets are typically built and approved months before the year they pay for. By the time a program is running in classrooms, the decision to fund it was made long before.
- **Fiscal years vary.** Districts, colleges and state agencies may not run on the calendar year or on each other's schedules. Check each target's published budget documents or simply ask.
- **Approvals follow the dollar amount.** Small purchases may be approved by a department; larger ones often need formal procurement steps and board approval. Thresholds are set by state law and local policy, so ask what applies.
- **Mid-year money exists, but it is usually tied to something.** Grants, unspent program funds and partner contributions can open doors outside the normal cycle, but they come with rules about what they can fund.

Where the money usually comes from

Funding source	What it means for you
General / operating budget	Most competitive. Needs a strong tie to a district or campus priority.
Federal formula programs (e.g., ESEA titles such as Title I and Title IV-A)	Have specific allowable uses and often an evidence expectation. The federal programs director knows what fits.
Career & technical education funds (Perkins V)	Supports secondary and postsecondary CTE. Relevant if you strengthen career pathways, credentials or work-based learning.
Workforce funds (e.g., WIOA through local workforce boards)	Tied to job seekers, training and employment outcomes. Talk placement, not just enrollment.
State, foundation and competitive grants	Can fund pilots. Offer to be a named partner on a district or college application.
Employer and community partners	Industry partners sometimes co-fund programs that build their talent pipeline.

> **THE QUESTION THAT SAVES MONTHS**
>
> "If this were a fit, which budget would it come from, and when does that budget get decided?" Ask it in your first or second conversation. The answer tells you whether you are early, on time or a year late.

SECTION 04

Your 30-day partnership plan

Thirty days is enough to go from "we should sell to schools" to real conversations with the right people. Block about five focused hours a week.

WEEK 1

Get focused

- Pick **one** primary partner type (e.g., suburban districts, rural districts, community colleges, workforce boards).
- Write your **outcome statement**: who you serve, what changes, by when.
- Define **one entry offer**: a scoped pilot with a clear start, end and success measure.
- Gather your evidence: results, data, stories, testimonials you already have permission to use.

WEEK 2

Build your list

- Build a list of **25 target accounts** using the criteria in Section 5.
- For each, find the Champion, Decider, Payer and Gatekeeper by name and title.
- Pull one public **need signal** per account: a strategic plan goal, board agenda item, grant or news story.
- Draft your one-page outcomes sheet and pilot proposal outline (Section 7).

WEEK 3

Start conversations

- Send first-touch emails to your top 10 accounts (templates in Section 6).
- Ask for **warm introductions** through anyone you know: past colleagues, board members, employers, alumni.
- Show up where your buyers already are: a regional meeting, a public board meeting, a college advisory committee.
- Follow up on every non-reply after about a week, with something useful.

WEEK 4

Convert to next steps

- Run discovery calls: goals, timing, budget source, decision process (questions below).
- Send a tailored pilot proposal within 48 hours of a good call.
- Reach out to the next 15 accounts.
- Review: who replied, who didn't, which message worked. Adjust and repeat.

Five discovery questions to ask every time

1. What are the one or two goals you are being held to this year?
2. What have you already tried, and what got in the way?
3. Who else would need to be involved for something like this to move forward?
4. When do you plan for next year, and which budget would this come from?
5. What would a pilot need to show for you to feel confident expanding it?

SECTION 05

Building a target list that works

A short, well-researched list beats a long, scraped one. Twenty-five accounts you understand will produce more conversations than five hundred you don't.

Score every account on four things

Criterion	What to look for
Fit	Grade band, student population, program type and size that match what you do best.
Need signal	A public goal, problem or initiative your work directly supports.
Access	An existing relationship, a warm introduction or geographic proximity.
Funding fit	A plausible budget source: a program, grant or partnership that could pay for you.

Where to find need signals

- **Strategic plans and school improvement plans**, usually posted on district and school websites
- **Board meeting agendas, minutes and recordings**: what leaders are discussing and approving right now
- **Published budgets** and budget presentations
- **Job postings**: a new coordinator role often signals a new initiative
- **News releases and grant announcements** from districts, colleges and state agencies
- **College program pages and catalogs**, workforce board plans and employer advisory committees
- **Public directories**, such as state department of education listings and the NCES district search, to build your starting universe

Track it simply

A spreadsheet is enough. Suggested columns:

Account	Need signal	Champion	Decider	Payer	Gatekeeper	Budget timing	Last touch	Next step
[District / college]	*[Goal or news]*	*[Name, title]*	*[Name, title]*	*[Name, title]*	*[Name, title]*	*[When they plan]*	*[Date]*	*[Action + date]*

SECTION 06

Outreach that gets replies

Education leaders get a lot of vendor email. The messages that get answered are short, specific to them and easy to say yes to.

The rules

- **One person, one problem, one ask.** Don't send the same note to the whole cabinet.
- **Reference something real and public**: a strategic plan goal, a board discussion, a new program.
- **Lead with the outcome**, not your product name or features.
- **Keep it under about 120 words.** Your reader is on a phone between meetings.
- **Make the ask small**: a 15-minute call, or the name of the right person.
- **Follow up two or three times** over a few weeks, adding something useful each time. Then stop.
- **Warm beats cold.** An introduction from someone your buyer trusts (a peer administrator, employer partner or former colleague) is worth more than any subject line. Ask for one first.

Sample 1: First touch to a CTE director

Subject: Supporting [District]'s [pathway] goal

Hi [First name],

I saw that [District]'s strategic plan calls for [specific goal, e.g., more students earning industry credentials in health sciences].

We help high schools [outcome, e.g., prepare students for an entry-level credential exam within one semester], working alongside existing CTE teachers rather than adding to their load. [One line of evidence you can stand behind.]

Would a 15-minute call in the next two weeks be useful? If someone else on your team owns this, I'd be grateful for a pointer.

[Your name]

[Title, Company] | [Phone]

Sample 2: Follow-up to a community college workforce dean

Subject: Idea for your [program] cohort

Hi Dr. [Last name],

Following up on my note from last week. Since then I noticed [College] [recent public signal, e.g., announced a new advanced manufacturing certificate].

One idea: a small, one-term pilot with a single cohort, with success defined up front as [measure, e.g., completion and employer interviews]. If it doesn't hit the mark, you walk away with the data at no further obligation.

I've attached a one-page summary. Is this worth a short conversation, or is there a better person to talk with?

Thank you,

[Your name]

SECTION 07

What to prepare before you pitch

Your champion has to sell you internally when you're not in the room. Give them three things they can forward without editing.

1. A one-page outcomes sheet

- **Headline:** the outcome you deliver, for whom, in what timeframe
- **The problem** in their language, tied to goals they already have
- **How it works** in three or four plain steps, including staff time required
- **Evidence:** your results, how they were measured, and with whom
- **What a pilot looks like** and what it costs
- **Contact** and a single next step

2. A pilot proposal (2-3 pages)

Section	What to include
Goal	The district or campus goal this supports, in their words
Scope	Sites, grade levels or courses, number of students, start and end
Roles	What you do, what staff do, and how much time it takes
Success measures	Two or three measures agreed before you start, with how and when they're collected
Data & privacy	What student data you need (ideally the minimum) and how you protect it
Cost & funding	Price, what's included, and possible funding sources
Decision point	When you'll review results together and what expansion would look like

3. Evidence, honestly presented

You don't need a randomized study to start. Federal law (ESEA, as amended by ESSA) defines four levels of evidence for "evidence-based" activities: strong, moderate, promising, and **demonstrates a rationale**, meaning a well-reasoned basis in research with ongoing efforts to examine effects.[1] Early-stage companies can often build a credible rationale case: a clear logic model, the research your approach draws on, and a plan to measure results in the pilot. Be precise about what your data shows and doesn't show. Overclaiming is the fastest way to lose a curriculum director's trust.

Also have ready

- Privacy policy, data security summary, and willingness to sign a district data privacy agreement (student records are covered by FERPA and often by state privacy laws)
- Accessibility information for any digital product
- Vendor paperwork: W-9, certificate of insurance, references
- Short bios for anyone who will work with students or staff, and your background-check process

SECTION 08

Common mistakes to avoid

Every one of these is common, and every one is avoidable.

Mistake	Better move
Pitching the whole product in the first email	Lead with one outcome and ask for one small next step.
Treating a teacher's enthusiasm as a buying signal	Thank your champion, then ask who else needs to be involved.
Offering a free pilot with no end date or success measures	Scope every pilot: who, how long, what success means, and when you decide together.
Ignoring the budget calendar	Ask when they plan and from which budget. Then work backward.
Waiting for IT and privacy questions to come up	Send your privacy and security documents before they're requested.
Using startup language: "disrupt," "revolutionize," "AI-powered"	Use their words: students, outcomes, staff time, goals.
Overstating evidence	Say exactly what you measured, with whom, and what you're still learning.
Going around your champion to their boss	Equip your champion to bring you upstairs and ask how they'd like to involve leadership.
Disappearing after the pilot	Schedule the results review before the pilot starts. Bring a clear expansion option.
Spreading thin across every market	Pick one partner type for 90 days. Get proof. Then expand.

CHECKLIST

Partnership readiness checklist

Print this page. Tick what's done. Don't send a pilot proposal until most of the boxes in each group are checked.

FOCUS

- [ ] I've chosen one primary partner type for the next 90 days
- [ ] My outcome statement names who I serve, what changes and by when
- [ ] I have one clearly scoped entry offer (pilot)

TARGETS

- [ ] I have 25 target accounts scored on fit, need, access and funding
- [ ] Each account has a named Champion, Decider, Payer and Gatekeeper
- [ ] Each account has at least one public need signal
- [ ] I know (or plan to ask) each account's budget timing

MATERIALS

- [ ] One-page outcomes sheet, written in the buyer's language
- [ ] Pilot proposal template with success measures and a decision point
- [ ] Honest evidence summary and a plan to measure results
- [ ] Privacy policy, security summary and willingness to sign a data privacy agreement
- [ ] Vendor paperwork ready: W-9, insurance, references

OUTREACH

- [ ] First-touch and follow-up emails written for each role
- [ ] List of people who could make warm introductions
- [ ] Follow-up schedule set (two or three touches, then pause)
- [ ] Five discovery questions ready for every first call

PIPELINE

- [ ] Tracker set up with next step and date for every account
- [ ] Weekly 30-minute pipeline review on my calendar

NEXT STEP

Let's look at your pipeline together

If you've read this far, you're serious about school, college and workforce partnerships. The fastest way to find what's stalling your deals is a second set of eyes from someone who has sat on the other side of the table.

Free 15-minute pipeline audit

Bring your current target list, a recent outreach email or your one-pager. In 15 minutes we'll look at:

- Whether you're talking to the right roles in your top accounts
- Where your timing is working for you, or against you
- One change to your message or offer most likely to get more replies

No pitch deck and no obligation. You'll leave with at least one thing you can act on this week.

The Partnership & Pipeline Sprint

For teams that want hands-on help, the **Partnership & Pipeline Sprint** is a focused engagement to sharpen your offer, build a researched target list, write outreach that fits each decision-maker, and prepare the outcomes sheet and pilot proposal your champions need to say yes.

Prentiss M. McLin, Ph.D.

Book your free audit: email prentiss@dbmc.pro to book a call

Email: prentiss@dbmc.pro

Web: dbmc.pro

SOURCES

[1] U.S. Department of Education, Non-Regulatory Guidance: Using Evidence to Strengthen Education Investments (2023), citing ESEA section 8101(21)(A). ed.gov/media/document/non-regulatory-guidance-using-evidence-strengthen-education-investments-2023-46305.pdf

Perkins V (Strengthening Career and Technical Education for the 21st Century Act): U.S. Department of Education, Office of Career, Technical, and Adult Education. cte.ed.gov/legislation/perkins-v

What Works Clearinghouse (evidence reviews of education programs): ies.ed.gov/ncee/wwc

NCES Common Core of Data district search: nces.ed.gov/ccd/districtsearch