

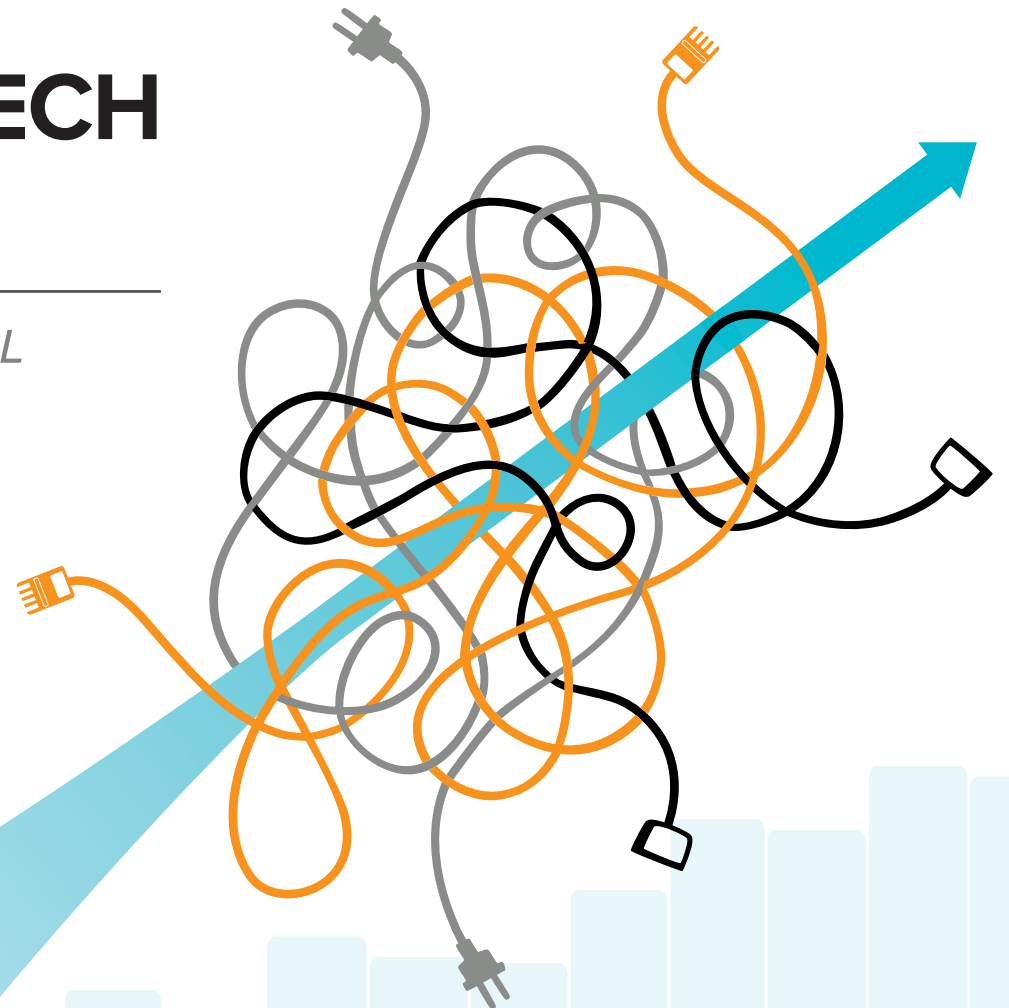


GUIDE TO

# PURCHASING EDTECH THE *RIGHT* WAY

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14 STEPS TO MAKING A SUCCESSFUL  
EDTECH PURCHASE



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*This information was adapted from the Digital Learning Now paper "Smart Series Guide to EdTech Procurement" by Bailey, Owens, Schneider, Vander Ark, and Waldron.*

# INTRODUCTION

## The use of technology in schools has increased so rapidly

in the last several years that many education leaders today do not have first-hand experiences to draw from as they work with their teachers to integrate technology into the classroom. This makes it harder for them to figure out the best tools, systems, and programs to buy, and more difficult for them to support teachers in the implementation process.

Many of the changes to education policy and practice that have taken place in the last several years have shifted the focus to helping individual students succeed based on their needs and strengths: from Response to Intervention (RTI) and No Child Left Behind (NCLB), to new school models that incorporate blended learning and flipped classrooms. Technology has played an instrumental role in making these advancements possible and has become commonplace throughout the country—allowing schools to move towards more effective student-centered learning on a much greater scale.

In addition, the advent of the new College and Career Readiness Standards has increased the importance of finding products that are tailored to the specific needs of specific districts, schools, teachers, and students while answering the demands of more rigorous standards. Some educators are choosing to keep doing the same thing they were doing before because they are overwhelmed by the new standards or think what they have

is enough or “aligned.” In most cases, using old materials and methods will not be enough to prepare students. Schools are increasingly realizing that they need products and services that were built for the new College and Career Readiness Standards—not retrofitted or worse, just re-labeled.

In our work with hundreds of school districts over the past few years, we have learned a lot about the challenges that districts face when trying to figure out what technology to choose and how to integrate it into their schools in order to help make classrooms better places for teachers to teach and students to learn.



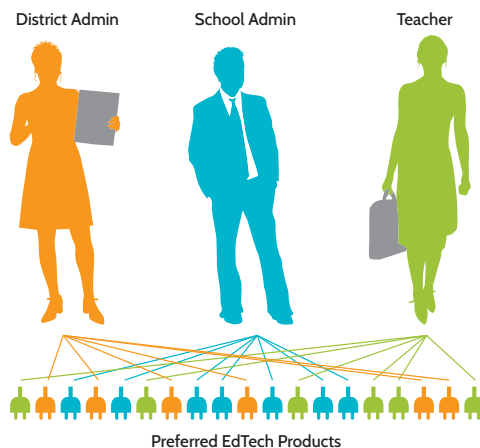
*What follows is guidance that will help simplify the process for you and your staff and help you avoid many of the pitfalls of those who have come before you when you're in a position to select new materials.*



# TAKE INVENTORY

**You need to know what you already have to help you figure out what you need.** Do an audit—this includes hardware, software, apps, and any practices already in place associated with those products. Calculate the ongoing license costs of current software and figure out what you can eliminate. You may find that you have a lot that you're not using.

An audit we did with one mid-sized district showed that **they had purchased more than 70 ed tech programs**, only one-third of which were being used. In addition, district administrators preferred one set of products, school administrators another, and teachers a third.



The same sales rep had sold them ten of the products, representing four different companies in seven years. No one is well-served in a scenario like this one, especially students and teachers.

To avoid a scenario like this, one of the key parts of an audit is to survey your staff, including curriculum coordinators, the CIO, principals, and teachers. You can use a free online survey tool like *Zoomerang* or *SurveyMonkey* to list out the district tools and programs and ask:

- *Which tools are you using most?*  
*Why? Be specific.*
- *Which tools are you using least?*  
*Why? Be specific.*
- *Which are your top three favorite tools?*  
*Why? Be specific.*
- *Which are your least favorites?*  
*Why? Be specific.*

Once you get your report, look at the commonalities and differences. You need to know and understand what is happening and why in order to figure out what the needs are and how best to meet them.

## Taking Stock

1. For whom was the technology originally intended (e.g. which students, teachers, or administrators)? Who is currently using the technology?
2. How often is the technology being used?
3. For what purpose is the technology being used? Is it as originally intended?
4. Is the technology supported with the appropriate level of resources (human and financial)?
5. How has the technology improved student outcomes that are measureable?
6. Do students, teachers, and administrators enjoy using the technology?



## DETERMINE YOUR EDUCATIONAL PRIORITIES

**Even in a small district, more minds are better than one.** Create a group of 3–10 people from across the district. Share the findings from your audit with the team. Ask one simple question that Clay Christensen, Harvard University professor and author of *Disrupting Class*, asks: **What is the product being hired to do?** This should guide many of your internal conversations and serve as a focal point in the buying process.

“What is it being hired to DO?”



Do you need help with RTI, guidance in your transition to the new standards, support for a blended learning initiative, a way to better communicate with parents about student growth? **Do your best to make the answer simple, such as, “save RTI teachers time and improve reading gains for the lowest 10% of students.”** Debate this question with your team as necessary. If you can’t come up with a specific, unanimous answer, you are likely to have problems with implementation and consistent use of your chosen product down the road.

And if you’re not exactly sure how your answer translates to product features, **consider issuing a request for information (RFI) first** instead of a request for proposal (RFP). This will allow you to see what’s out there in the market (which is changing at an increasingly rapid rate) before writing a more official RFP. When you eventually do create an RFP, **limit the responses to a maximum of 10 pages** so you are not overburdened with too much information to decipher.

### What is the product being hired to DO:

- Help with MTSS/RTI?
- Guide your transition to the new standards?
- Support a blended learning initiative?
- Help communicate student growth to parents?
- Facilitate collaboration among teachers?
- Determine mastery of *grade level* standards or their subdomain level strengths and areas of need *across* grade levels?
- Help streamline the amount of time teachers and administrators spend on interpreting student data?
- Provide effective professional development on specific topics?

# 3 DON'T CUSTOMIZE (TOO MUCH)



**Your district's tech needs are not as different as you may think:** don't blow your budget on customizations, because highly customized products are usually unnecessary and expensive. Despite unique traits in each district, the objectives schools have and the challenges schools face are pretty consistent around the country. Most schools need products that help with the new College and Career Readiness Standards, have instruction linked to assessments, provide tools grounded in solid and reliable data that enable better decision making, include programs that work seamlessly together to create blended and personalized learning environments, and are backed by a reputable company that provides high quality, ongoing service and support. If you ask vendors to customize products for you that have complex technical requirements, they will likely charge you a lot more money and disappoint you with untested code and delivery delays.

Be specific about what you want, but don't overreach. For example, we have seen RFPs that ask for a valid and reliable instrument that you can customize and add items to. However, the moment someone can add an item on their own is the moment validity ends. The less you try to customize, the less it will cost and the better the product will be.

# 4 CONSIDER COLLABORATIVE BUYING



There are numerous purchasing consortiums and cooperatives operated by school districts, state governments, and education service agencies. **Buying cooperatives are commonly set up solely to facilitate their members' ability to purchase a product at a co-op negotiated price that is lower than a company's list price,** because there is an assumption that more will be sold than if the vendor were to just sell to one district or school individually. This can help save funds as well as time since many of these purchasing consortiums have already completed lengthy RFPs.

Do your homework on how the consortium or co-op works though, because sometimes the specific conditions and requirements preclude some vendors that may have good solutions from participating. If a district thinks a co-op is a good solution for their district, they should be sure to understand how their money will be spent.

The goal remains to ensure that the product meets the district's specific needs. Therefore, we recommend that a district still consider putting out an RFI or RFP even if they are considering purchasing through a co-op, because even though the RFI/RFP process can be time-consuming, ideally the proposals returned will be tailored to each district. District leaders should then come back to their educational goals and evaluate the proposals based on whether or not the product will best accomplish these goals. If they find a vendor that meets their needs, they can check the co-op's vendor list, because they may be able to save some money.

# 5 MAKE REAL COMPARISONS



**Force vendors to make apples-to-apples comparisons.** When you narrow your vendor pool to 3–5 providers, demand that their presentations be based on a common standard of your choosing (e.g. finding the area of the circle) and/or specific data questions. This will allow you to compare different approaches to the very same learning outcomes or data needs and find the one that is the best fit for you and your district. When you ask about results in other schools, make sure vendors are providing you with data from districts of a similar size and make-up to yours. Make them get specific and ask them tough questions like:

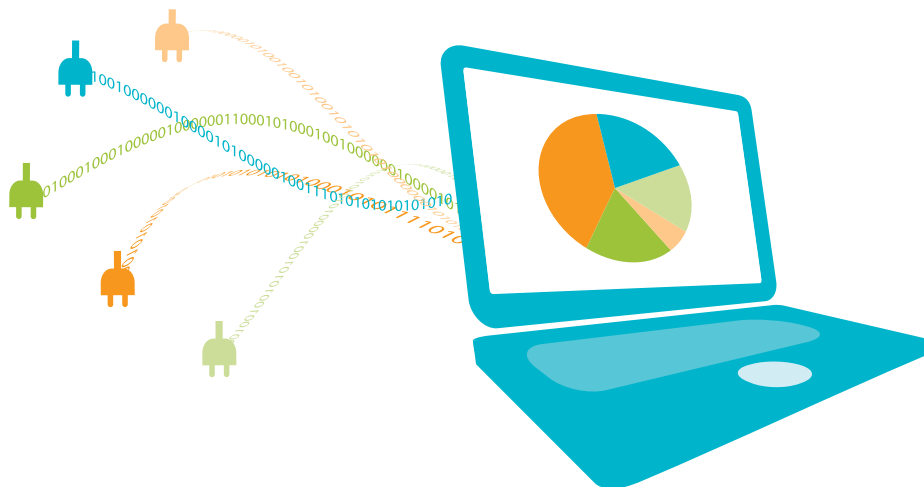
- What are the **results from your program in other schools?**
- What is your **renewal rate as a percentage of sales?**

**Vendors may try to entice you with a free trial, but this often doesn't give you much additional information.** While a free trial may give you a snapshot of what the product looks like and how one student may view and use it, it is unlikely to give you a deep understanding of how the product can work for you, specifically.

	Vendor A	Vendor B	Vendor C
Criterion 1	✓	✗	✓
Criterion 2	✓	✓	✓
Criterion 3	✓	✗	✗
Criterion 4	✓	✗	✓
Criterion 5	✗	✓	✓
Criterion 6	✓	✓	✗

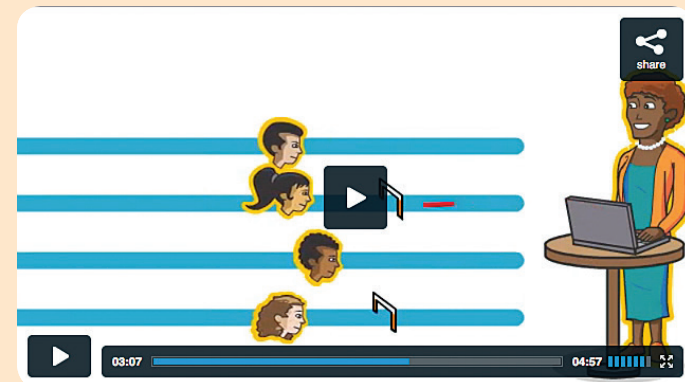
# 6 KNOW DATA INTEGRATION CAPABILITIES

The products or services you buy must be capable of seamless integration across multiple programs and the data must be easily shareable. Gone are the days of being able to easily choose one product and vendor for online assessments and another product and vendor for test prep and yet another product and vendor for benchmark materials. As more student and school data move online for academic and administrative purposes, **work with companies that integrate and partner with other service providers so that you are not creating extra work for your staff.**



## Helping Great Teachers Teach

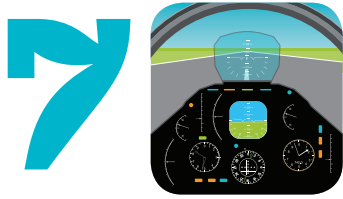
Across a multitude of industries from construction to medicine, technological advancements have vastly expanded the potential for humans to make significant progress and achieve what was once unimaginable. In education, technology is finally catching up with the needs of teachers and students. We now have adaptive technologies that allow us to change every question on an assessment and every instructional lesson based on a student's individual diagnostic profile. **Rather than just waiting for the end of the year to see how a child did on a single day on a single state test, we can get real-time feedback on not just whether a child is behind, but why she is behind.** We can then immediately deliver the instruction that she needs to catch up.



Curriculum Associates' CEO Rob Waldron discusses the rapidly changing world of education technology and the great potential it has to transform how teachers teach and students learn in this video:

**[CurriculumAssociates.com/transform](https://CurriculumAssociates.com/transform)**





## CONSIDER A PILOT

Once you get to the point that you are very interested in a product and think it may be a good fit for your district, it may be worth considering doing a pilot of the product. What distinguishes a pilot from a free trial is that **a pilot is used with real students in real school(s) with real data.** A pilot should be a partnership between the vendor and the district. The vendor should ask you tough questions and make sure that you have key points of contact and regularly scheduled meetings. They should dedicate time and resources to assist with participant identification, support and planning for professional development and training, and provide detailed logistics. In addition, in order to be successful, a pilot must have:

- **Specific goals.** For example: math intervention program for students in grades 3–5 across the district, with attention to potential limitations of district’s technological infrastructure.
- **Internal champions.** It is critical that you have key champions in your district that are invested in planning and committed to implementing the pilot as if they were implementing a fully purchased product. Don’t make someone do it. It will not go well.
- **Sufficient length.** Depending on the product/service, it usually takes about 12 weeks to have meaningful data with legitimate results to inform decision making.

- **A planned conclusion.** What will the wrap-up look like? When and how will you review the data, interview teachers? A pilot shouldn’t just be about making a purchasing decision. You should be left with *real* data that helps you understand your students better.
- **Transparency.** While it may seem counterintuitive, if a vendor is overly accommodating, it may be a red flag. All vendors have limitations and you need them to be honest about what they are. A vendor who says, “oh yes, we can do A, B, C and X, Y, Z” without first sitting with you to understand your district’s needs and goals is unlikely to get you where you need to go.
- **Money.** Be willing to invest a little bit of money in your pilot. A vendor may give you licensing for free and ask you to contribute for professional development. Professional development costs, such as trainer salaries and travel expenses, are not easy to streamline. A good vendor wants you to have a positive and in-depth experience with their product and service. If you both invest a bit, the rewards can be greater.

**Choose a vendor who does fewer well-managed pilots over one that is managing many pilots at the same time.** It is very challenging for vendors to manage pilots well. With the high level of detail and precision required of a pilot, most vendors cannot possibly support or be invested in several pilots at the same time.

# 8



## PAY ATTENTION TO SERVICE

While a lot of the pitches sound the same, **service differentiates a good product from a great one.** Service from your ed tech provider will make or break the experience of your teachers and the learning outcomes of your students. Find someone that you want to partner with who is going to provide you good service—not just when selling you the product, but all the way through from training and implementation to ongoing support through the life of the product.

You should discuss service at length during the sales process, including account management, data migration, roster sign-on, and the product road map. You should know:

- How **different tiers of support are handled.**
- What the company's **contract renewal rate** is.
- Who your **account manager** will be, and meet that person.
- The **CEO's (or other executive) mobile phone number** in case you need something immediately.

In our new software-as-a-service world, you are going on a journey with the company whose products you choose and you need to know how well they can adapt as testing standards and technology change. The last thing you want for your teachers and students is a one-year implementation of a new technology. It wastes time you don't have and will leave them frustrated and unlikely to get on board with future technology changes or implementation. Change in education and technology is constant and you need someone who can keep up and help you keep up too.

## What is Software as a Service (SaaS)?

**Software that is web-based, hosted externally, and delivered via the Internet** is called Software as a Service, or SaaS. It differs from on premise-based software that requires it reside on a school or district-based server, and can be harder to update, and more difficult to maintain. Many education technology companies have shifted to using a SaaS model, because it allows them to react to customer demands more quickly. They are able to maintain one code base that, when changed, delivers updates to all customers at the same time. This benefits teachers and students, because they are **guaranteed to have the most current version of the software delivered automatically** whenever updates are made.

**Total cost of ownership for SaaS tends to be lower** because the vendor is responsible for maintenance, reducing the demands on a school's technology support team. An administrator is no longer required to download software updates or patches to each device or terminal. A disaster recovery plan or duplicate database need not be maintained, because the vendor is responsible for software reliability.

Ed tech companies who use SaaS **price their products based on a subscription model, and they can't succeed in the long term unless customers renew.**

In this scenario, vendors and educators alike see the software usage statistics and the data on student gains (or lack thereof). This level of transparency ensures that only those companies who are providing great products and great service are the ones that survive.

# 9 UNDERSTAND TOTAL COST OF OWNERSHIP

Just like making any major investment in your personal life—like buying a car, or a house—you need to look at the total cost of ownership of a product. **Where are the hidden fees?** Ask about the costs of all professional development so that you have an agreed-upon price in place if you opt for additional professional development service after you get started.

Make sure you fully understand the ongoing costs for licensing, installation training, IT support, and troubleshooting before closing a deal with a vendor. **Assume that you will spend 20% more on professional development than you originally budget.**

And continue to make an apples-to-apples comparison. **If one vendor's licensing fees look too good to be true compared to others, it's probably because they are.** That vendor may charge extra for things like set up, maintenance, and support, when other vendors include that. Make sure you understand the pricing set up and what it means, down to the last detail.

# 10 DEMAND GUARANTEES & ASSURANCES

If you are negotiating an individual contract (versus purchasing through a co-op), **ask for a money-back guarantee and pricing assurance.**

Set a policy that all curriculum vendors who do business in your district must give you an unconditional money-back guarantee. You have the purchasing power. Vendors need your business and will acquiesce to this request if you insist.

**Ask vendors to send the last ten sales prices, per student served, for districts of your size** (at some companies, prices for the same software can vary by as much as 40%). Ask the CFO of the company to certify the authenticity of the information. This will prevent you from being overcharged and show you if a neighboring district was able to negotiate a better deal.

# 11 FIND WAYS TO SAVE

It is important when negotiating with a vendor, that you **think about “expanding the pie,” where all parties benefit** versus having an “us vs. them” mentality with a vendor. Work together with the vendor to figure out how to make the outcome of negotiations most cost-effective for you.

When asking for discounts, which you should absolutely do, talk about price in real numbers—not in the abstract and get a sense of where a vendor’s real costs are. If you have to fly someone in to do an all-day training, that’s a real cost incurred by the vendor with airfare, etc., which is difficult to reduce. Discuss ways to economize. Some examples:

- *Vendor could come to your district and **train everyone at once over a few days**, which is much cheaper than having them come back multiple times over a few months.*
- *Explore the **differences between seat-based and site-based licenses**. What is the break-even point for the vendor?*
- ***Site-based support vs. all-day off-site training** where you need to hire subs or use professional development days.*

There can be different prices for different options in a variety of areas. Figure out with the vendor which options are best for your specific implementation. The best vendors will have ideas about how to get you the best price and pass savings on to you.

# 12 ASK FOR REFERENCES

**Ask for five or six references of a similar size district.** Email or call these references and leave this message: “If you think product and service of [the company] is truly outstanding, please call me back and leave a message. Otherwise there is no need to call me back.” If the references are true champions of the company, product, and service, they will call you back. If you don’t hear from them, find another vendor. A company with outstanding products and service has true champions that WILL call you back. On reference calls, spend at least one-third of the time discussing service, including account management, data migration, and roster sign-on, and what they know about the product roadmap.

*“If you think product and service of [the company] is **truly outstanding**, please call me back and leave a message. Otherwise there is no need to call me back.”*

# 13 IMPLEMENT, IMPLEMENT, IMPLEMENT



Correct implementation by the entire staff is crucial to the success of any program. Everyone—district leaders, teachers, curriculum coordinators, IT staff—needs to understand what the product is, how it will be used, and what the objectives are. **We see the most success when the “average teacher” is on board and well trained with the product.** You want a product that works for your average teacher first—not the highest performer or the struggling ones.

The product you select needs to work for the majority and you can help the others get on board or take it to the next level. Lack of cohesion in terms of strategy, expectations, and usage among district staff will limit the success of a newly purchased program. Buy fewer products and go deeper with them. You don’t need 15 reading and 10 math programs in your district. Find the one, or few, that best meet your needs and “own” them.

# 14 REMEMBER IT’S A JOURNEY



Remember, the product you are buying today, no matter how good it is, will be wrong or incomplete before too long because of ever-changing curriculum requirements and technological advancements. **It is important to focus as much on who you want to go on this journey with, and how well they can adapt to change,** as you do on the current product features. The last thing you want to do is implement a new major software product and stop using it the next year, because it no longer meets your evolving needs.

## About the Author: Rob Waldron

Rob joined Curriculum Associates as President in 2008 and became CEO in 2009. He previously served as an operating executive at Berkshire Partners and CEO of Jumpstart for Young Children, a national nonprofit that prepares disadvantaged children for school success. Under Rob's leadership, Jumpstart doubled in size. Rob also spent nine years at Kaplan Education, where he served for five years as the CEO of Score Learning Centers and grew revenue from \$2 million to more than \$50 million. Rob graduated from Northwestern and Harvard Business School and is a former Fellow at the Harvard Kennedy School of Government. He has been recognized as one of the Top 25 Social Entrepreneurs by Fast Company magazine and a Young Global Leader by the World Economic Forum and is currently a Pahara-Aspen Education Fellow. Rob is also a board member of The Fessenden School in West Newton, MA.



Built to address the rigor of the new standards, *i-Ready* helps students make real gains. *i-Ready* collects a broad spectrum of rich data on student abilities that identifies areas where a student is struggling, measures growth across a student's career, supports teacher-led differentiated instruction, and provides a personalized instructional path within a single online solution.

## Curriculum Associates

*Curriculum Associates is a privately owned, rapidly growing education company committed to making classrooms better places for teachers and students. We believe that all children have the chance to succeed, and this drives the decisions we make every day. Our award-winning products, including cloud-based i-Ready, provide teachers and administrators with flexible resources that deliver meaningful assessments and data-driven, differentiated instruction for children. We serve millions of students with our i-Ready, Ready, and BRIGANCE programs because of our laser focus on our customers' needs over our own bottom line, and a belief that thoughtful and continuous innovation leads to a positive impact on classrooms and measureable growth for students. Learn more by visiting us at [CurriculumAssociates.com](http://CurriculumAssociates.com) or calling 800-225-0248.*

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