



PHOTOGRAPH / JOEL BENJAMIN

# HOW TO AVOID GETTING RIPPED OFF BY ED-TECH VENDORS

## TEN TIPS FOR SCHOOL DISTRICTS FROM AN INDUSTRY INSIDER

**DURING OUR HONEYMOON** in Istanbul several decades ago, my wife and I found ourselves caught up in negotiations in the famed carpet souk. Having expressed a flicker of interest in one of the rugs we passed, we were whisked into an extraordinary sales pitch, the likes of which I've never encountered in all my years as a CEO. Dazzled by intricate weaving and gorgeous colors, we were fish in a barrel—fish with no idea what questions to ask, how to check for quality, or what to pay for such a rug. We emerged dazed, with significantly fewer lira and a lovely rug we never knew we needed.

Only later did we learn there is a marked difference between the exquisite workmanship of true artisans and the shoddy work done on rugs that will leave your floors stained with dye. We also learned we could have paid half of

what we shelled out if we'd been more adept at negotiating.

To those shopping for educational technology, the snares and pitfalls of the marketplace pose analogous challenges: purchasers are at risk of getting ripped off if they aren't sufficiently informed. In today's increasingly crowded market, school administrators need to see beyond glittery promises and learn how to invest in cost-effective programs that will drive the greatest gains for students. With hundreds if not thousands of students affected by a single purchasing decision, the stakes could not be higher.

Companies have developed a dizzying array of new software tools designed to do everything from assessing and monitoring students' progress to supporting a blended-learning environment to supplying entire curricula, complete with online activities and homework assignments. And

by ROB WALDRON

## While it is easy to get mired in sorting through a program's

educators seem to have developed a taste for these new digital tools, because the K–12 ed-tech market is on the rise. About 30 percent of school districts are increasing their software spending, according to a 2015 report from *EdNET Insight*. And *EdWeek Market Brief* reports that U.S. spending on K–12 ed-tech is expected to grow to \$1.83 billion by 2020, a 38 percent increase relative to 2014 (see Figure 1).

As the CEO of a leading ed-tech company, I have worked with hundreds of school districts over the years. I've witnessed most every purchasing mistake that can be made, and, on the flip side, have developed a detailed understanding of what works. In this article, I tap into

this expertise to help you make the most of your ed-tech dollars when you are purchasing software for your K–12 students. Here are my top-10 tips:

### 1. Check the Fridge Before You Go Shopping

Before you can decide what you need, you've got to know what you already have. So do an audit—of current hardware, software, apps, and any established practices associated with these 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.

One district recently conducted an assessment audit and inventoried a whopping 332 student assessments in use. Administrators were shocked. It turned out that district administrators preferred one set of tests, school administrators another, and teachers a third. And while the initial decisions behind each of these chosen assessments made sense, they were made in silos, with well-intentioned teams not communicating with one another. The collection was overwhelming, often redundant, and not serving students well.

To avoid a scenario like this, be sure your audit includes a survey of your staff, including curriculum coordinators, the CIO, principals, and teachers. Free tools such as Google Forms, Zoomerang, or SurveyMonkey can help as you compile a list of your current programs.

Be sure to ask:

- Which tools are you using most? Why, and for what specific purpose?

- Which tools are you using least? Why? Be specific.

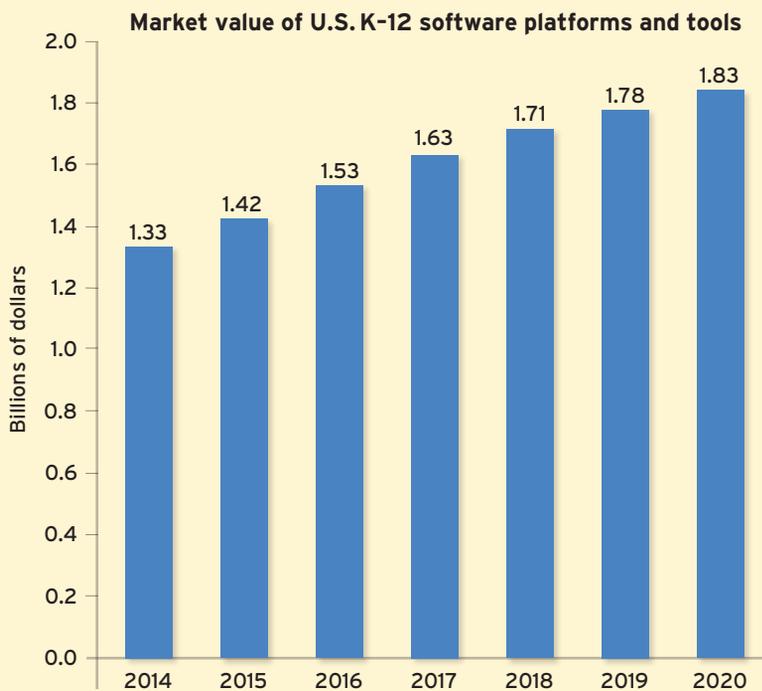
- Which are your top-three favorite tools? Why? Be specific.

- Which are your least favorite? Why? Be specific.

In analyzing your survey results, pay attention to the *reasons* certain tools are revered, and look for redundancies. It's generally best to take something away before you add, and knowing what tools you currently have and the purposes they serve will clarify where excess can be cut, what your needs are, and how best to meet them.

### Large and Growing K–12 Ed-Tech Market (Figure 1)

*U.S. spending on K–12 ed-tech was more than \$1.5 billion in 2016, and is expected to grow to \$1.83 billion by 2020, a 38 percent increase relative to 2014.*



NOTE: Data for 2017 onwards are forecasted.

SOURCE: Michele Molnar, "K–12 Ed-Tech Platform and Tools Market Value to Increase to \$1.83 Billion by 2020, Report Says," *EdWeek Market Brief*, May 1, 2017, data from Futuresource Consulting Ltd.

## features, finding a tool that improves the ways teachers work with students should remain your North Star.

### 2. Ask: What Is the Technology Being “Hired” to Do?

This question should guide many of your internal conversations and serve as a focal point in the buying process. Do you need help with Response to Intervention (RTI), streamlining data, transitioning to new standards, support for a blended-learning initiative, a better way to communicate with parents about student growth? Do your best to narrow the scope of your answer and keep it simple and targeted. For example, state clearly and succinctly “save teachers time and improve reading gains for the lowest 10 percent of students.”

Debate the question with your team as necessary, ensuring you involve classroom teachers in the discussion. While it is easy to get mired in sorting through a program’s features, finding a tool that improves the ways teachers work with students should remain your North Star.

Beware of products that say “yes” to every feature you would like. Try to check too many boxes and you’ll likely end up overpaying for a product that under-delivers. If you can’t come up with a specific, unanimous answer to the question posed above, you will likely have problems with implementation and consistent use down the road. In the same vein, keep your expectations in line with the product’s features. I recall an instance when a new customer expressed frustration with the things our product *didn’t* do. Just as you wouldn’t expect a Ferrari to act like a pickup truck, neither should you expect a technology to do a job for which it was not designed.

And if you’re not exactly sure how your answer to the above question translates into product features, consider first issuing a request for information (RFI) before a request for proposals (RFP). The vendor responses should allow you to see what’s out there before you write a more official RFP. When you do get to that step, limit each company’s response to a maximum of 10 pages so you are not bombarded with too much information.

### 3. Buy off the Rack

I recognize that every student is unique and every school has distinctive circumstances, but your district’s tech needs are probably not as singular as you may think—and custom tailoring is expensive.

In my experience, highly customized products are usually unnecessary. Despite the unique qualities of every district, most objectives and challenges in K–12 education are consistent across the country. Most schools need

products that help with the implementation of standards, that link instruction to assessments, that are grounded in solid and reliable data that enable better decisionmaking, that work seamlessly with other programs to create blended and personalized learning environments, and that are backed by a reputable company that provides high-quality, ongoing service and support. If you ask vendors for customizations with complex technical requirements, they will likely charge you a lot more money and disappoint you with delivery delays and under-tested add-ons.

Be specific about what you want, but don’t overreach. For example, we have seen RFPs that asked for a valid and reliable test instrument that users could customize and add items to. However, as any good researcher will tell you, a “customizable valid instrument” is an oxymoron. The moment you allow outsiders to add unique items to a test is the moment it stops being valid. The less you try to customize, the less the product will cost and the better it will perform.

### 4. Compare Apples to Apples

Once you have narrowed your vendor pool to three to five providers, insist that they base their presentations on a common standard of your choosing (for example, in 7th-grade math, “Know the formulas for the area and circumference of a circle and use them to solve problems”), data reporting questions, or both. This will allow you to compare different approaches to the same learning outcomes or data needs and find the best fit for your district. When you ask about results in other schools, make sure vendors are providing recent data from districts that are similar in size and makeup to yours. Make them get specific, and ask tough questions—one of my favorites is to check their renewal rate. Do 90 percent of customers renew their contracts each year, or do most jump ship? A high renewal rate is a good indicator of customer satisfaction.

Trusted independent evaluations like those available for free via edreports.org also serve as excellent tools for comparing programs.

And beware of the free trial. Vendors may try to entice you with one, but a trial (as opposed to a full pilot) likely won’t give you much additional information. While it may provide a snapshot of how the product performs and

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how some students may view and use it, it is unlikely to offer a deep understanding of how the product can work for you specifically.

When comparing products, look for those that are capable of seamless integration across multiple programs, and confirm that data will be easily shareable. As more student and school data move online for academic and administrative purposes, you can avoid creating extra work for your staff by dealing with companies that integrate and partner with other service providers.

### 5. Check References

Ask for five or six references from districts that are similar in size to yours. Email or call these references, and leave some version of this message: "If you think the product and service of (Company X) is truly outstanding, please call me back. Otherwise, there is no need to respond."

A company with outstanding products and service has true champions who *will* call you back. If you don't hear from the references, find another vendor. On reference calls,

ask how the tool is improving teacher practices and affecting students. Spend at least a third of the time discussing service, including how your account will be managed, how student data will be migrated, and what they know about the company's plans for future product enhancement.

### 6. Do a Real Pilot

Once you think you've identified the right product for your district, consider doing a pilot. Unlike a free trial, a pilot is conducted with real students in real schools with real data. A pilot should be a partnership between vendor and district. The vendor should ask you tough questions, provide dedicated contact people, and hold regular meetings.

To be successful, a pilot must have:

- *Clear goals.* For example: "Provide math intervention for students in grades 3–5 that works within the limitations of the district's technological infrastructure."

- *Internal champions.* You must have key individuals invested in planning and implementing the pilot as if it

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were a fully purchased product. (Don't force this role on anyone—it will not go well.)

- *Sufficient time.* With variations depending on the product or service, it usually takes about 12 weeks to get meaningful data and legitimate results to inform decisionmaking.

- *A planned conclusion.* A pilot should leave you with real data that help you understand how the product will aid you to better serve your students. What will wrap-up look like? When and how will you review the data and interview teachers?

- *Transparency.* All companies have limitations: insist that vendors be candid about theirs. Beware of overly accommodating vendors who promise they can do A, B, C and X, Y, Z without first understanding your needs and goals.

- *Money.* A good vendor wants you to have a positive, in-depth experience with the program. Be willing to invest a bit in the pilot to see greater rewards. While vendors may be able to offer free licenses during the pilot, it is difficult for them to pare down professional development costs such as trainer salaries and travel expenses.

- *Reflection.* In gathering comments from stakeholders, distinguish *product* feedback from *implementation* feedback.

Choose a vendor that does fewer, well-managed pilots over one managing many simultaneous pilots. 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.

### 7. Put Service above Product

The billionaire entrepreneur Elon Musk, whose success is rooted in innovative technology, recently remarked: “People are mistaken when they think that technology just automatically improves. . . . It only improves if a lot of people work very hard to make it better.”

This statement is especially true in regard to the ed-tech industry, where the people behind a product differentiate a good one from a great one. Even more than the quality of the product itself, the service you receive from your provider will make or break the experience of your teachers and the learning outcomes of your students. Find a partner who is committed to excellent service—not just when making the sale, but all the way through from training and implementation to ongoing support throughout the life of the product.

Try to get a sense of whether or not the vendor is *proactive* in fixing problems. If students are experiencing frustrations

with an interface, they will let their teacher know. The teacher will then become frustrated and will let the principal know, and so on, up to the ed-tech decisionmakers. But this process could take weeks. Recently, our company visited a large district in Ohio because our support team could see from the client's daily data logs that elementary school students were having issues with screens freezing when they used our i-Ready tool. During the visit, we brought the curriculum team and the IT team together and were able to diagnose and fix the problem. The curriculum team had been unaware of the screen-freezing issue before we called them proactively.

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

- How the company handles different tiers of support
- The name of your account manager—and insist on meeting that person

- The CEO's (or another executive's) mobile phone number, in case you need something urgently

In our 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 it can adapt as academic testing standards and technology change. The last thing you want for your teachers and students is a one-year implementation. It wastes time and will leave them frustrated and perhaps reluctant to get on board with future technology changes.

### 8. Find Creative Savings

As with any major investment, such as a car or a house, you need to look at the total cost of ownership, not just the sticker price. If a vendor's licensing fees look too good to be true, they probably are. That vendor may charge extra for things like setup, maintenance, and support, while other companies include those services in their regular price. Ask about the costs of all professional development, and make sure you fully understand the ongoing costs for licensing, installation, training, IT support, and troubleshooting before you close a deal.

A good vendor—one with whom you will want to partner in the long term—will want to satisfy the customer. A great one will think of ways to get you the best price and will pass savings on to you. When asking for discounts, which you should absolutely do, talk about price in real

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numbers and get a sense of the vendor's true costs. Discuss ways to economize, such as:

- Having the vendor train everyone in your district over several days rather than paying for multiple visits
- Exploring the differences between seat-based and site-based licenses
- Considering site-based (in-district) support instead of offsite training that would require you to hire classroom substitutes or use professional development days

Ask vendors to send you their latest 10 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 percent). Ask the company's CFO to certify the authenticity of the information. This step will prevent you from being overcharged and reveal if a neighboring district negotiated a better deal.

Collaborative buying may be another avenue to explore; there are many purchasing consortia and cooperatives operated by school districts, state governments, and education service agencies. Such co-ops are set up to enable members to purchase a product at a negotiated price. Working with them can help save funds as well as time, since many of them have already completed lengthy RFPs. Be sure to do your homework, though, because sometimes specific conditions and requirements exclude some vendors that may have good solutions to offer.

Even if you are thinking about purchasing through a co-op, consider putting out your own RFI or RFP to give your school leaders a chance to evaluate whether the product will serve your district's educational goals. Once you find a program that meets your needs, check the co-op's vendor list to see whether you can get a discount.

### 9. Get a Guarantee, or Walk

Adopt a policy that all curriculum vendors that do business in your district must give you an unconditional money-back guarantee—no fine print. You have the purchasing power. Vendors need your business and will acquiesce to this request if you insist. At our company, if a customer is not satisfied for any reason, they may return materials for a prompt and courteous credit, exchange, or refund.

### 10. Get Everyone on the Bus

Correct implementation by the entire staff is *crucial* to the success of any program, and we see the best results when every teacher is on board and well trained with the

product. Be sure that the staff are prepared to integrate the new tools in a way that is cohesive and effective for their students. And keep in mind that the total cost of a product includes the time it takes your team to learn how to use it, so build this time into schedules to ensure a successful implementation.

Everyone—district leaders, teachers, curriculum coordinators, school board, IT staff—needs to understand the product and buy in to shared objectives and expectations. Make sure the message you share is consistent. In your communications, don't forget to include parents and, of course, the students.

As you roll out your new program, keep your messaging focused on the ways this new tool will help students (not adults). Clarify what the technology will minimize or maximize in support of student growth. Make time for this process, ensuring that decisionmakers are available to explain purchasing decisions, staff are included in professional development to understand program nuances, and families receive any necessary training or information to support their children.

### And Remember . . .

Integrating complex new tools doesn't happen overnight, so give programs a chance to gestate and demonstrate how they can help your students and teachers. But also remember that the product you are buying today, no matter how good, will be inadequate or incomplete before too long because of changing curriculum requirements, technological advances, and new government requirements or guidelines. That means it's as important to focus on the partners you choose for this journey, and how well they can adapt to change, as on current product features.

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