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EDITORIAL PROJECTS IN EDUCATION

DECEMBER 11, 2018

"QUARTERLY BRIEFING: EXCLUSIVE MARKET RESEARCH ON SEL, ASSESSMENT, PURCHASING  
INFLUENCE, AND MORE"

12:00 P.M. CT

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>> SEAN CAVANAGH: Hello, everyone. Welcome to today's *EdWeek Market Brief* "Quarterly Briefing: Exclusive Market Research on Social-Emotional Learning, Assessment, Purchasing Influence, and More." I'm Sean Cavanagh. I'm a Senior Editor for *EdWeek Market Brief*.

Today, we're going to talk about several key trends and topics that have emerged over the past year and the data that *EdWeek Market Brief* collects and surveys we conduct of K-12 administrators and teachers around the country.

Many in our audience already know this, but *EdWeek Market Brief* publishes the results of surveys of K-12 officials twice a month in our exclusive data sections. We'll talk about what the survey results tell us and what we're hearing in conversations with school district administrators and teachers.

Our briefing today will be led by two of my *EdWeek Market Brief* colleagues.

First is Kevin Bushweller, the Executive Editor of *EdWeek Market Brief*. He's covered K-12 education for nearly 30 years. In addition to his *Market Brief* role, he serves as Assistant Managing Editor for Education Week overseeing its coverage of educational technology and the production of its annual technology counts report.

Just a quick word about *EdWeek Market Brief* overall. *Market Brief* provides actionable intelligence about the needs and priorities of schools and school districts to companies doing business in the K-12 market. We do through this original reporting, deep analysis of trends and district demands, and in purchasing, and through original data-driven research. We produce a steady stream of new content every week, which you can keep up on by reading our weekly e-newsletter delivered every Monday morning.

Our other presenter is Holly Kurtz. She directs the Education Week Research Center. She's a former education journalist with a Ph.D. in education policy. She has broad experience in both qualitative and quantitative research.

The Education Week Research Center conducts research and data analysis for *EdWeek Market Brief* about purchasing influences, budgets, products, and other topics.

The Research Center also conducts custom research for education companies in the market, who include DreamBox Learning, Scantron, and WestEd. Some of these studies inform a company's internal strategic objectives, and others form the basis for thought leadership products such as white papers and webinars that are posted and promoted on *EdWeek.org*.

As I mentioned, the Research Team is led by Holly Kurtz and staffed by an experienced team of full-time analysts.

Before we begin, now is a good time to review some technical aspects of today's presentation. Please check the audio settings on your computer, as well as your speaker volume settings if you're having any audio trouble. If you're still having issues, please see our detailed audio troubleshooting file available in the resource list -- in the resource list under the Q & A window.

There are also some other icons that open additional feature panels in our webinar console.

You can read about today's speakers in the speaker bio panel and access the resource list to download a copy of today's slides.

To submit a question for our speakers, type them in the Q & A box located above the resource list window. Again, if you want to submit a question, we'll be taking questions at the end of this briefing. Type them in the Q & A box located above the resource list window.

Finally, an on-demand archive of today's briefing will be available within the next 24 hours.

Now I would like to hand us over to my colleague Holly Kurtz to take us through what some recent data has shown in important trends in the market.

>> HOLLY KURTZ: Thank you so much.

The first trend we'll discuss is the demand for social and emotional learning products. As you can see from this graph, nearly 90% of district leaders told us they had already invested in social and emotional learning products or they planned to do so. Districts tend to be hungry for curriculum that introduces SEL or social-emotional learning concepts, and they either like to teach this as a standalone topic or weave it into different academic courses.

School districts also have shown interest in conducting assessments of students' social and emotional learning, often through surveys.

Returning to the survey results, based on a spring 2018 survey of more than 500 district leaders, of that nearly 90%, 28% have already invested in SEL products. 45% plan to invest to a moderate degree over the next year in SEL. And 13% plan to make extensive investments in this area over the next year.

In another piece of study we did of SEL, we asked district leaders what their top questions were about SEL products. Their top question was, "How can we measure whether SEL is working?"

That's something to keep in mind as you consider this growing marketplace.

One interesting thing we saw about SEL investment plans is that we saw it differed by district demographics.

High poverty districts are more likely to have already invested in SEL. That's something to keep in mind as you assess the marketplace.

I'll turn it over to Kevin for more context in this area.

>> KEVIN BUSHWELLER: Thank you.

It's worth noting that a group of 19 school districts has partnered with the Collaborative for Academic Social and Emotional Learning, better known as CASEL, to put in place comprehensive SEL strategies and to then study their results. Education companies should keep an eye on developments in those districts.

The participating districts include Anchorage; Atlanta; Austin; Baltimore; Boston; Chicago; Cleveland; Dallas; Denver, DuPage County, Illinois; El Paso; Minneapolis; Nashville; Oakland; Palm Beach County, Florida; Sacramento; Tulsa; Warren City, Ohio; and Washoe County, Nevada. The list is available on the CASEL website at CASEL.org under the partner district tab. I would encourage you to take a look at that.

Now, research about districts participating in the Collaborating Districts Initiative, or CDI, has revealed some interesting findings. In the area of improved academics, it found the three districts that use the National Assessment of Educational Progress, or NAEP -- that's Austin, Chicago, and Cleveland -- all improved their reading and math scores during the CDI implementation years.

In Anchorage, Austin, Chicago, Cleveland, Oakland, and Nashville, student grade point averages were higher at the end of the 2015 school year than before the CDI started.

Nashville, the only district with consistent standardized tests across the CDI years, showed improvements in both English language arts and math achievement.

There were also improved behavioral outcomes. Chicago's graduation rate increased 15% during CDI years. Attendance improved in four of six districts that collected this data. Suspensions declined in all five of the districts that collected this data.

And districts also reported the students' social and emotional competence improved, based on student and teacher surveys.

So here is the bottom line. If these positive outcomes continue, you will likely see more districts embracing SEL initiatives, and looking for products and services to help them -- to help make them work.

So on that note, you know, I would advise you to get to know CASEL, if you haven't already. In just two years, CASEL's Collaborating States Initiative, which originally planned to work with five states, is now operating in 25 states.

CASEL also outlines five core competencies of socio-emotional learning: Self-awareness, self-management, social awareness, relationship skills, and responsible decision-making.

But it's important to remember that, you know, a number of experts say educators and researchers are still struggling to figure out how to evaluate these competencies.

So at *EdWeek Market Brief*, we have a service called the purchasing alert, where we collect -- we look -- we examine RFP's and then publish the ones we think are most important to people like yourselves.

So this was -- here are a couple recent examples. These RFP's came out relatively recently in 2018. The first one, the 52,000-student Howard County, Maryland districts, solicitation of classroom-based social and emotional learning and restorative justice instructional programs for kindergarten through fifth graders. The 131,000-student school district of Philadelphia, need

for evidence-based social and emotional learning curricula for K-5, grades 6-8, and 9-12. And the 215,000-student Houston School Districts call for social-emotional learning curriculum for staff and for students in grades pre-K through 12.

There were others, as well. The Tacoma School District in Washington, which has about 30,000 students, they were looking for a social-emotional learning curriculum for grades K-5 that was aligned with Washington State social-emotional standards and CASEL competencies.

The Santa Fe Public School District in New Mexico, with about 14,000 students, they're looking for a social-emotional learning and bullying prevention program for staff and students in grades K-8. They advise -- they specifically said potential vendors should be able to demonstrate evidence of the program's successful outcomes, which sort of links back to some of the research that CASEL is doing.

The last one was from the Office of the Superintendent of Public Instruction in Washington State. It had issued an RFP for consultants interested in participating in creating a social-emotional learning web-based professional development system.

>> SEAN CAVANAGH: Kevin, I'll add one thing to this. This is reflected in the RFP's you've highlighted here, but when we look at the kinds of things that districts are demanding, there's a big emphasis on curriculum, both the stand-alone SEL curriculum and curriculum that can be woven into other subjects, as well as professional development, and in culturally responsive products in SEL that can help districts integrate SEL concepts within populations of students who are very diverse.

So those are just a couple things to keep an eye on.

>> KEVIN BUSHWELLER: Great points. Thank you, Sean.

I'm now turning it back to Holly to take us through what products K-12 educators really want.

>> HOLLY KURTZ: Thanks, Kevin.

Our next trend is based on one of our most popular pieces we ran this year. It's based on a survey we did. We asked district leaders and teachers, what is one ed tech product you would like to have but does not exist right now? This was an open-ended question. It was given to more than 900 teachers and district leaders.

One thing that was kind of interesting is that most of the desired -- many of the desired products that people wrote about already existed. But apparently, educators had not yet realized they existed.

So us, this really pointed to some opportunities for companies to educate teachers and district leaders about the existence of their more innovative products.

As is often the case when you ask people open-ended questions, you get a lot of different types of answers. It's not like any one type of product dominated here.

We got many, many different types of ideas about the ed tech products that were desired but didn't exist, but topping the wish list are systems that offered a comprehensive set of tools for tracking student data and work. For instance, one respondent wanted something that tracked student data, no matter what platform or tool was used.

Here are some examples of desired ed tech products in the different categories.

So as I mentioned, the most popular category was a set of tools tracking student data and work.

Next most popular category was a set of digital devices and tools for students.

Survey respondents wanted students to have basically better access to technology, such as computers, tablets, and devices.

One respondent wrote, "We need a computer lab."

Third most desired piece of technology that people perceived didn't exist but they wanted, is a cheaper, more durable device for teachers or students to use at home or school. One described as a low-cost, powerful, one-to-one device or tablet.

I'm going to turn things back over to Kevin to talk about some other products that actually do exist, that cut through the noise at the ISTE conference this year.

>> KEVIN BUSHWELLER: Many of you have probably spent time at ISTE. It's the biggest ed tech conference of the year in the United States. It's a very noisy place. There are so many products and services being promoted there it's that hard to know what educators think of it all.

We asked three educators to walk the exhibit floor this past June in Chicago and identify what caught their attention and why.

And based on their observations, we picked the top ten.

But first, I wanted to introduce you to the educators who we asked to walk the floor. Robert Dillon, Director of Innovation, School District of University City in St. Louis. Kimberly Lane Clark, Director of Blended Learning, Lancaster Independent School District in Texas. And Matthew Miller, Superintendent of Lakota Local School District in Liberty Township, Ohio. So a nice mix of a superintendent, innovation officer, and a blended learning official.

We do regular Q & A's with people like this for our K-12 Insider feature in *Market Brief*, and we find their insights about what they like and don't like about products and services and the way the K-12 marketplace works very interesting and useful. In some ways, it's a bit of a canary in the coal mine. They point to things that are coming down the pike and things education companies should be aware of.

Each panelist was asked to identify three products that impressed them and to explain their choices.

After giving their topics, the panelists were asked if they had runner-ups after their favorites.

So the three -- of the three leaders here, said they were looking for nuggets of gold and often found them off the beaten path where the largest, splashiest exhibits were vying for attention.

Of the ten products, five were start-ups and five were more established providers like Wonder Workshop and Common Sense Education.

Here, in no particular order, are the products that are now on these educators' radar and that they'll be keeping in mind for their districts in the future.

And it's worth taking a look, reading this list, because it's such an interesting mix. Kai's Clan, a collaborative coding robotics platform from Australia. Writable, a guided writing practice program that connects any style of instruction to a cycle of feedback and revision. There's Earshot, which was interesting to me. Earshot is a smartphone app that records the amount of time a teacher is speaking in a given hour of instruction, keeps track of how many open-ended or closed-ended questions are asked, how long the teacher waits for answers, and helps the teacher see how often she calls on specific students. Power-up, a paper airplane with a motor attached that can be controlled by an app on a smartphone or tablet, something I would have loved as a little kid. Wonder Workshop's Cue, a robot that draws geometric shapes. VF

America, a German-based learning space company that's been building classroom environments for a century, but only recently expanded to the United States. Common Sense Education's digital citizenship curriculum and ed tech product reviews. Vid Code, a startup offering coding courses primarily for middle school and high school students. Curriculum Pathways, which provides interactive, standard space resources in English language arts, math, science, social studies, and Spanish for grades K-12. And LEGO Education's Make Code for LEGO, Mindstorms Education Ev3.

So in looking at -- I found that this RFP here. It's particularly interesting in light of some of these products that appeared on this top ten list, because it looks at, you know, some new technologies, like augmented and virtual reality devices.

And, you know, that's related to some of the coverage we've been doing in Education Week about the future of work, which examines the types of skills students will need in the workforce of the future. Is this the RFP product wave of the future?

It's connected to the movement we're also seeing related to the use of artificial intelligence.

Now, the reality is the K-12 education system is historically much slower than other sectors of the economy to adopt new technologies, as most of you are probably well aware. That's likely to be the case with artificial intelligence and augmented reality and things like that.

But grossly underestimating AI's potential to disrupt teaching and learning would also be a big mistake. And so according to global market insights, the AI market in K-12 is expected to grow from less than 200 million in 2017 to about 1.2 billion in 2024.

I'll be very curious to see how RFP trends evolve over the next year or so as these new technologies become a much bigger part of the world outside of K-12.

>> SEAN CAVANAGH: I'll add one thing to the discussion of augmented and virtual reality. You were alluding to this. I mean we have heard through our reporting at *EdWeek Market Brief* that there is a great interest among district officials in trying to explore virtual reality and trying to figure out how it will -- how it can impact and improve lessons. We hear about this not just in traditional K-12 classrooms, but also in CTE programs, career and technical education programs, which are starting to, you know, fix their eyes on virtual reality and augmented reality.

The questions that a lot of these programs face, and the things that they need convincing of, is, you know, can this be done in an affordable way? And is, you know, VR and AR, are these applications going to be educationally worthwhile and not simply a distraction in the classroom?

So it's just something vendors should think about if they're trying to appeal to these school districts with AR and VR devices.

>> KEVIN BUSHWELLER: Thank you, Sean.

Now I'm going to turn it over to Holly to talk about solving the print versus digital equation.

>> HOLLY KURTZ: Okay. We just spent a bunch of time talking about the cutting edge and the future. We now turn to a more old-fashioned aspect of the education marketplace. Print has just not gone away in education. In fact, in a recent survey from the spring of 2017, we found about two-thirds of district leaders say that more than half of their curriculum materials are in print.

A previous market brief survey found the digital content comprised 37% of all sales to schools.

So why are schools kind of anchored stubbornly in what some people see as the past? Well, the most common reason is that schools say they do not have enough devices. A quarter

of district leaders say they use print curriculum materials because they don't enough computers or devices to support the content.

Almost as common as not having enough devices is a preference for maintaining print. 24% of district leaders say they maintain a mix of digital and print content because that's what they prefer.

19% say they stick with print text because that's what they say teachers want.

We're going to see differences by demographics. Higher poverty districts, where more than half the students are low income, the prime reason for sticking with print is the desire to maintain a mix of print and digital materials.

At higher income districts, teachers demand, so teachers desire to stick with print, is the top reason why districts maintain a mix of print and digital.

We also see some interesting differences by region. In the South, the main reason districts prefer print is they do not have enough computers or devices.

On the other hand, in the Northeast, the top reason for maintaining print is that that's what the teachers want.

Western and Mid-Western district leaders told us that they're most likely to maintain a mix of print and digital because they want to. They want to maintain that mix.

We also see some interesting differences and preferences by district size. Smaller districts with fewer than 2,500 students are the most likely to say they maintain print because that's what teachers want.

In mid size districts, it's the desire to maintain a mix of print and digital content.

Large district leaders say they stick with print primarily out of concern that they don't have enough devices to support digital content.

>> KEVIN BUSHWELLER: I just wanted to add --

>> HOLLY KURTZ: I'm going to turn it over to Kevin now.

>> KEVIN BUSHWELLER: Yeah. I wanted to add, it's interesting the research, the survey research we do, how we do break it down by poverty level and district size. Sometimes there's not a huge difference between what's going on there, but in a number of these exclusive data pieces, we actually have seen significant differences based on breaking it down by district size, by poverty level, by suburban, rural, et cetera.

It's great to take a look at that because they can identify opportunities for companies like yours.

>> SEAN CAVANAGH: I'll add one thing on the print to digital transition. One thing we have heard through our reporting over the past few years is we hear a lot of district officials, especially those still very heavily in the print world, talk about their concerns about the cost of big digital adoptions, about training teachers, which is, you know -- which is reflected in some of these survey results.

And in the past, in my reporting, I also heard a lot of district officials talk about the lack of reliable internet band width as a concern in terms of shifting from print to digital.

What's interesting, over the past few years, we've seen a pretty dramatic increase in internet connectivity, according to, you know, some studies of that that have been conducted.

So whether that results in an increase in, you know, administrators having more confidence in making a faster shift to digital remains to be seen.

Another thing to keep an eye on is just we hear a fair number of concerns coming from parents about screen time, and those concerns really seem to be in the wind right now, and so it's something to keep an eye on in terms of if we see any kind of retreat from digital or any kind of recalculation, at least at the early grades.

I'll turn things back over to my presenters.

>> KEVIN BUSHWELLER: So, you know, Holly talked about print and what we're also -- but we're seeing this, you know, shift, and it is -- it is a meaningful shift, where states are stepping up their role and reviewing digital resources. So 21 states now have a process for reviewing digital instructional materials, compared with 17 states in 2016, and just 14 three years ago.

And that's according to the State Educational Technology Directors Association.

So you're likely to see that number continue to go up. And as it goes up, that means they're going to be working with their districts to give them more options to purchase digital materials.

And, you know, states are putting a higher priority on digital instructional materials than they have in the past. That shift, you know, as I said, it will likely move to districts, pushing the print versus digital balance more and more toward digital content.

But as Sean and Holly noted, one lesson we've learned covering technology trends is to never underestimate educators preference for print products. That demand remains strong. It is probably why some education companies that started with digital-only products had to quickly pivot and offer some kind of print version, too.

What will be interesting to watch this year, though, because as the technology continues, the pace of change continues to get faster, is whether the pace of that shift from print to digital actually quickens, too.

So this RFP sort of fits very nicely within what we've been talking about here, you know, this preference for print but digital becoming more and more a part of the landscape.

The Loudoun County School District in Virginia is one of the largest and fastest-growing districts in the state. The county includes a highly educated population and a good number of high-tech employers. We would expect it to be advanced. Yet, it is far from making the switch to digital-only content, as shown by this recent RFP. It was looking for history and social science textbooks, which sounds like, you know, when I was back in school.

But it is worth noting that the district is also looking for, quote, both print and digital materials.

And that hybrid approach is definitely the direction most districts are heading, if they're not already there now.

So now, I'm going to turn it back over to Holly to talk about what kind of teacher feedback convinces K-12 districts to make purchases.

>> HOLLY KURTZ: Thanks, Kevin.

First and foremost, the thing that district leaders want to hear from teachers is that a product improves student achievement. That's according to a survey we did in the spring of 2018 of 500 district leaders.

The vast majority of those district leaders, 83%, told us it was very important for teachers to talk about the potential academic gains from a product they were considering adopting district-wide.

So improving student achievement. What does that really mean? According to some reporting we've done in *Market Brief*, districts' understanding of what student achievement is has changed over time. In some ways, it's getting a little bit more complicated than just, you know, how many students are proficient.

Districts want to know, for instance, how many students are close to being on track and how many are far off track and who are those students? What groups are way above or below their goals? And who are the outliers? And they want to figure out why.

The type of teacher feedback that districts want to get from teachers varies by some different market segments.

For instance, districts -- smaller districts with fewer than 2,500 students have a distinct set of concerns. More than half, 59%, say it's very important for teachers to report that they buy into a product.

By comparison, much fewer leaders in mid-sized and large districts say it's very important for teachers to say that they buy into a product.

Small district leaders are also more concerned about professional development. So they're more likely than their peers in larger districts to say that it is very important for teachers to say that they would train peers on how to use the product.

Teacher feedback can be a bit of a black box. One thing we often ask is to what extent does teacher feedback really matter?

And according to some work we've done, it doesn't always matter across the board. So when we surveyed them, in the spring of 2018, more than half of K-12 administrators we surveyed said they rarely adopt products for district-wide use based on the suggestions of teachers who try them out.

This points to some, you know, potential concerns, especially for companies that have a model where they sell the teachers and hope for district-wide scale of adoption.

The value of teacher recommendation really varies by district size. Leaders from smaller districts, fewer than 2,500 students, are a bit more likely to say they are often or very often influenced by teachers.

Leaders from larger districts say that less often.

I'm going to turn now to a topic that also -- another piece that also was quite popular this year with our *Market Brief* audience. This is research done on formative assessment products marketplace.

In this survey, conducted in spring of 2017, and included about 500 district leaders, we asked whether leaders were using some kind of formative assessment product. That's a product, not a, you know, not a teacher-made exit ticket. Nearly all the leaders, 99%, said, yes, they were using some kind of a product that was a formative assessment product.

We also asked these leaders what is important to you when deciding whether to purchase a formative assessment product?

The top desire is the ability -- was the formative assessment's ability to help teachers differentiate instruction for students.

A close second was the quality of the data about student performance.

The third biggest need for formative assessment was that it was aligned with state standards.

One thing I thought was kind of interesting about that is that a survey that we had done a year earlier found alignment with state standards was a top purchasing influence for formative assessments. That makes me wonder if alignment with these standards is a waning influence due to possibly some of the less punitive approaches states are taking in terms of accountability when it comes to the nation's main federal education law, the Every Student Succeeds Act, which replaced No Child Left Behind.

There are some important regional differences to understand here. In the Northeast, helping teachers differentiate instruction is by far the most important consideration. Next is the quality of the data produced by the formative assessment about student performance, followed by research supporting effectiveness.

In the South, by contrast, alignment with state standards is the most important consideration, followed by the quality of the data on student performance, and the ability to help differentiate between instruction.

Midwestern leaders are most concerned about data quality. That's their number one concern. Number two concern is the product's ability to help teachers differentiate. Third biggest concern is alignment with state standards.

Finally, in the West, as in the nation as a whole, differentiation is the top concern, followed by concerns about data quality, and standards alignment.

We also found some key differences for leaders from different locales. So differentiation is the top concern among suburban leaders and urban leaders.

However, rural district leaders' top concern is data quality.

Finally, we found that needs differed by district size.

Differentiation was the most important consideration in mid-sized districts with 2,500 to 9,999 students.

Differentiation was also the top concern in larger districts with 10,000 or more students.

But for those smaller districts with fewer than 2,500 students, data quality was the top concern.

Kevin is now going to talk more about the type of data that school districts need from assessment companies.

>> KEVIN BUSHWELLER: So what a big data-hungry district needs from assessment companies. From one of our K-12 Insider pieces, we talked to three officials from the Orange County, Florida School District's Test Development and Measurement Department, and here are seven take-aways from that interview.

What they need, and what they want, is, one, actionable information, not just more data to pile on top of more data. Two, experimentation with performance assessments and development of sophisticated ones. Three, someone who can look at the data and know what to do with it next. Four, built-in flexibility in the assessment platform, empowering teachers to sort of grow with the assessment system. Five, very reliable assessment software. Six, intel on where the assessment company has worked before and how successful it has been with similar-sized districts. And seven, strong data security features.

So this comment from one of the Orange County assessment administrators who we interviewed articulates some of the those priorities really nicely. And so I think it is worth reading out loud what she had to say. Pay close attention to the text highlighted in red.

"Anything where you get more authentic ways to explore data and tie that data to actionable information will be valuable. A lot of the goodness you get from any assessment is the data you get out of it. But what's lacking is someone being able to look at the data and knowing what to do with it next. How can someone who develops assessments solve that problem? Where's the product or tool that will tie all of those things together in a way that manageable on a very large scale? That's something we need now, and we'll need more in the future."

So this, here is a relatively detailed summary, a summary of a recent RFP from a large school district in Tennessee. The Knox County School District is looking for formative assessment software, and the assessment should pay particular attention to English language arts instructional shifts, mathematical practices, scientific cross-cutting concepts, and three-dimensional standards and social studies practices.

Results and feedback should identify student skill gaps and provide next steps for mastering standards.

The system should allow for different role level access privileges and support a range of major web browsers and operating systems.

So there's a lot there. I think you'll see more districts looking for that level of detail down the road.

So we use two databases to track RFP's. I can tell you that assessment-related RFP's, that's by far one of the biggest categories in our purchasing alert section.

And in addition to the assessment RFP on this slide, we have published information about the 129,000-student Prince George's County School System in Maryland needing an online math assessment; the Maryland Department of Education looking for a computer adaptive testing system; the Virginia Department of Education awarding contracts to 13 vendors for student growth assessments for local district use; and the Kansas City, Missouri School District needing software for online instruction and assessment for kindergarten through eighth grade.

Now, I'm going to turn it back to the moderator.

>> SEAN CAVANAGH: Great. We have now reached the Q & A portion of our presentation. Just a reminder, if you are interested in submitting a question, you can do so by putting it in the Q & A window available in the resource list section of the screen.

Holly, I'll start with a question for you. We had a question about some of the methods we used for *EdWeek Market Brief* in conducting our surveys.

The question is from someone in our audience who asked is it possible to share when these surveys were done and what the sample size is? Any other details, for example, on geographic parameters would also be helpful.

Can you help fill in, any of those details?

>> HOLLY KURTZ: Sure. Most of the surveys I talked about today were done in the spring of 2018. We surveyed more than 500 district leaders. It was a nationwide nationally representative sample. It would include people from, you know, all over the country. And it included all different kinds of district leaders, superintendents, curriculum instructors, et cetera.

There were a couple of results from 2017, the spring of 2017, but most were from the spring of 2018.

>> SEAN CAVANAGH: So I'm clear on that, the administrators you're talking about, it's a very broad cross-section of administrators and districts; is that right?

>> HOLLY KURTZ: Yes, it is. I guess I should mention there was one -- there was one sample that did include teachers. That was the sample of 900 teachers and district leaders. But for the most part, these are from the spring 2018 survey of district leaders.

>> SEAN CAVANAGH: Kevin, I wanted to pose this question to you, because I know that we report a lot on, for *Market Brief*, what administrators think of various products and what their demands are, but we should mention that *EdWeek* just came out from a survey conducted by Holly's group of what principals think of the whole idea of personalized learning. Those results showed that principals, a majority of them, did record personalized learning as a potentially transformational way to improve public education. At the same time, they see the push for personalized learning as coming primarily from technology companies and vendors.

Let me ask you, did those results surprise you, the fact that principals, in particular, seem to be embracing personalized learning, given that personalized learning is everywhere?

>> KEVIN BUSHWELLER: I think it was a bit surprising that it was a majority of them that felt like it was a really positive force in education. But I think it's really important when you look at those survey results to realize that they also have very serious concerns about it.

And their concerns are that if it's taken too far, and it becomes, you know, just kids sitting at computers working on software programs, that's not the best way to educate kids, either. It needs to be a nice mix of digital tools and face-to-face learning and social interaction and such.

That kind of played out in the survey, too. One of the things that the principals told us, 85% of those surveyed said they worried that digital technologies, specifically for personalized learning, contribute to students spending too much time on screens.

And this is even more interesting to me. A similar percentage, 77%, said they worried that such technologies lead to students spending too much time working alone.

And 73% said digital tools do nothing or very little to improve student's social-emotional skills, something we talked about at the beginning of this presentation.

So I think they're embracing the concept of it, but it's the execution of it that they have some significant concerns about.

And in some of our reporting, we found that some schools, while still being very supportive of the concept of personalized learning, are dialing back the technology a little bit, a little bit, to make sure that there is a nice balance.

>> SEAN CAVANAGH: I will add, along those lines, that, you know, as we've talked about in this presentation, demand for social-emotional learning products is everywhere. We see it in the RFP's being put forward by school districts and we hear this in conversation. One point I'd make is a lot of school districts are at the point right now with both personalized learning, however that's defined, and social-emotional learning, that what they really want is sort of help with general guidance and direction. We get questions from districts who are interested in social-emotional learning and personalized learning, but don't know where to start.

So for vendors out there, the more you can provide sort of consultative information to get districts off the ground, the better off you'll be.

And the other thing I'll mention about social-emotional learning is vendors should keep an eye out for a bit of a, you know, backlash or retreat on social-emotional learning, in terms of we hear some pushback from districts on, "Are some of these algorithm-driven products to look at student emotions and trying to track student emotions going too far?" Vendors should be

prepared to answer those questions, particularly if they're relying on student data to power whatever social-emotional learning products they're using.

>> KEVIN BUSHWELLER: Sean, can I add one thing to the personalized learning conversation, as well?

As part of the struggle for principals and for school district leaders, too, is there's still a lot of confusion about what exactly personalized learning means. And, you know, it can vary from district to district and even in schools within a district.

And I think that that -- you know, people are struggling to try and better define it.

And so when you work with a district, you should try to develop a really good understanding of what their definition of personalized learning is so you can help them in whatever ways you can, rather than sort of taking your definition of personalized learning and imposing it upon them.

>> SEAN CAVANAGH: Right. Good point.

I'll pose this next question we've got from the audience. I'll start with Holly and then Kevin. Feel free to weigh in. I'll weigh in, too.

Holly, this person is asking, if in our survey results less than 50% of district leaders say they make purchasing decisions based on teacher recommendations, what does influence their purchasing decisions?

Is there any information in the data that speaks to that or do you have any general thoughts on the other factors that may be at work there?

>> HOLLY KURTZ: Yeah, we've actually done quite a bit of research on this topic. Usually, the number one thing that is driving them is their perception the product is going to improve student achievement. That perception doesn't have to come from the teacher. It can come from, you know, their evaluation of the products and their colleagues. District leader purchasing tends to be very collaborative. Often in a big district there's seven or eight different people in on the decision. I think there's a lot of influence. People are quite influenced by -- district leaders are quite influenced by other district leaders.

The superintendent in particular tends to be influenced by, you know, the people who report to him or her, who might be out, going out and doing research. People at the lower levels might be sort of assigned to go out and do research on the product.

So that's more of a chance for you to directly influence your customers, as those, you know, curriculum directors, for instance, are going out and looking at your white papers and webinars and that kind of thing.

Those are some of the main influences.

The other thing that's a huge influence shift in terms of what district leaders are looking for in a product is the perception that a product improves student engagement. That's something we've seen as increasingly important, to the point that student perception had improved and student achievement is important.

Of course, then cost comes into effect. Really, the main concerns are improving student achievement and student engagement, and then cost starts to play a role.

>> SEAN CAVANAGH: I would add one thing. For a lot of district leaders, to answer this person's question, it's peer-to-peer recommendations. This is still very much a word-of-mouth industry. That's something we hear all the time. District leaders, a lot of superintendents, are connected to superintendents around their states.

When they hear that a product has succeeded in meeting goals, that really carries a lot of weight among them.

And Kevin, anything you wanted to add about other things that influence this?

>> KEVIN BUSHWELLER: Yes. To address the person's question a little bit beyond the answers that Holly and you gave, is I think -- and this gets back to you really need to understand the district you're working with, because it really depends on the culture of a district. So if a district is a very bottom-up culture, and they value teacher perspective highly, and because of that they put processes in place that allow teachers to give basically official recommendations on products. You know, we've seen a number of districts have those kinds of programs in place where the teacher plays a much bigger role in vetting ed tech products.

I think the reality is that those are more the exceptions. It's still very much a central office-type decision.

But, you know, the teacher influence is important. And even if it's not the deciding factor, if you are going to put a product into a district, you are going to want to make sure teachers are going to buy into using it, or you're going to have some trouble down the road.

>> SEAN CAVANAGH: Just a few other questions we have. I can take a crack at answering one of these. How are you defining social-emotional learning? I'll admit this is sort of an amorphous term. We're going based sort of on what districts tell us, and I know the definition can vary from district to district. But generally speaking, what districts have meant by this is sort of building a holistic set of skills in areas like communication, collaboration, resilience, self-control, and overall student wellbeing.

But I appreciate the person's question.

Another person --

>> KEVIN BUSHWELLER: Sean, can I add one other thing to that question, though?

>> SEAN CAVANAGH: Sure.

>> KEVIN BUSHWELLER: They should go back in our presentation to the slide that is titled Get to Know CASEL If You Haven't Already. Because that slide lays out sort of what the key elements of social-emotional learning are.

And I would encourage that person to take a second look at that slide or a closer look.

>> SEAN CAVANAGH: Good point.

>> HOLLY KURTZ: I thought this was an interesting question because when we did the survey we did not define social-emotional learning for the people who took the survey.

That may be interesting to ask in the future to ask the district leaders, "How do you define social-emotional learning?"

>> SEAN CAVANAGH: I would add on that note we at *EdWeek Market Brief* really want to make our surveys reflect the needs of our audience. So if you have an idea for something that you want to ask the K-12 community, if there's a topic you're interested in, just contact one of us -- me, Holly, or Kevin -- and we'll look into shaping questions that can go out into the field to K-12 administrators.

We certainly want ideas from K-12 companies and other organizations.

We have another comment here. Someone is writing in and saying, I think in response to some of our data, saying for what it's worth we're still hearing that standards, standards, standards everywhere, I assume, and influencing districts' purchasing decisions.

A comment by me, I agree with that. When he saw surveys, there was a good one that came out last year that looked at why districts choose to buy new curriculum. One of the big factors, even if it's only every six to ten years in core subjects, is because the standards change.

So whenever there's the adoption of new standards, it feeds the market.

So I completely agree with that.

Holly, let me just ask you a question about our surveys and some of the results.

Do you tend to find that administrators, when we survey them, have much different opinions on some of these products than teachers? Or do the results tend to be pretty similar when we're asking about their needs and priorities when it comes to both administrators and teachers?

>> HOLLY KURTZ: Well, that's an interesting question, Sean. One thing we found, as you go up the administrative ladder, the view gets progressively rosier. We did a study where we obtained net promoter scores for a variety of different education companies. Teachers all gave the lowest net promoter scores, across the board, followed by the principals, and followed by the district leaders. Teachers tend to have lower levels of satisfaction with products than do principals and then district leaders.

I don't know if it's because teachers are closer to the ground and dealing with realities more first hand, or because they didn't have a direct role in purchasing the products, but that's something that we often see.

>> SEAN CAVANAGH: Thank you.

We're at the end of our allotted time. I appreciate all the great questions that have come in. Thanks to Kevin and Holly for their terrific contributions for today.

I'd like to remind our audience if you would like to watch today's presentation again, an archive will be available in the next 24 hours. I'd also encourage you to visit [marketbrief.edweek.org](http://marketbrief.edweek.org) to find articles that explore today's topics and today's data that we presented.

Thanks to Holly and Kevin and thanks to our audience. We'll catch you next time.

(End presentation at 1:01 p.m. CT)

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