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K-12 LEADERS' BIGGEST PROBLEMS IN
CIRRICULUM AND THE SOLUTIONS THEY WANT
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>> MICHELLE DAVIS: Hello everyone, and welcome to today's market brief quarterly briefly, K-12 biggest problems in curriculum and the solutions they want.   I'm Michelle Davis the senior writer for EdWeek Market Brief.   This is the third year EdWeek Market Brief has done an exclusive special research project, which is based on a nationally representative survey of K-12 administrators.   This year's report focused on identifying the biggest challenges K-12 officials face in curriculum, assessment and professional development and the solutions that those district leaders are most interested in seeing from vendors.

Today we'll be talking about the results of the first installment of the special report, which is focused on curriculum.   We'll hear presentations from Sean Cavanagh, who is the managing editor of EdWeek Market Brief, and we'll also hear from Holly Kurtz, who is the director of the Education Week Research Center.   Before we begin, now is a good time to review of the technical aspects of today's presentation.   Please check the audio settings on your computer as well as the speaker volume settings if you're having any audio trouble.

If you're still having issues, please see our detailed audio troubleshooting file, which is available in the resource list under the Q & A window.   There are also some other icons that open some additional feature panels in our webinar console.   You can read about today's speakers in the bio panel and access the resource lead to download a couple of slides.   To ship a question for speakers, type them into the Q & A box located about the resource list window. Finally, an on-demand archive of today's presentation will be available online in the next 24 hours.   Now I'd like to hand the presentation over to Sean to kick things off.   Sean.

>> SEAN CAVANAGH: Thanks, Michelle.   As readers of market brief know, we regularly conduct surveys of K-12 administrators around the country about topics in the market.   We look at buying preferences, district officials' views of different vendor practices and other issues. We publish these results twice a month in our exclusive data section on the website.   Each year we've also gone more in-depth by conducting special research projects on issues of importance to our readers.

Each of these research projects was based on a nationally represented survey of the audience as well as on reporting.   Three years ago we asked district administrators about their perceptions of megacompanies that work in the K-12 space in addition to the work that they do in the broader consumer space.   Those companies were Amazon, Apple, Google and Microsoft.

We asked administrators in districts about the quality of those companies' products, their responsiveness to customer needs, the pricing and other issues.   Last year we took a deep dive into the curriculum and assessment markets asking K-12 officials which products they're using most often in districts.   We also asked those district officials about the quality of the products, their affordability, their innovation and other issues.

In addition, we asked K-12 officials about a wider range of companies, assigning those companies a net promoter score based on whether district officials would recommend the vendors to peers or not.   This year we're taking a different approach.   We're releasing three separate reports on curriculum, then assessment and then professional development.

In each report we asked K-12 officials about the biggest problems or challenges they face and the solutions they want for those problems delivered to them from vendors.   We asked for open-ended responses, allowing district officials to write in what they thought.   We're talking today about the first of those reports, which is focused on curriculum.

I'll turn it over to my colleague, holly Kurtz, who will talk in detail about the report's findings.

>> HOLLY KURTZ: Thanks, Sean.   As discussed the title of this special report this year is called curriculum problems and proposed solutions, what district leaders want.   I'm going to start out by telling you a little bit about the survey.   It was an online survey.   It was conducted in March.

It's nationally representative and included 494 district leaders, and some of the titles -- this is not the full list of titles, but these are a few of the types of the respondents we received.   Most common position was superintendent.   We also got quite a few assistant and deputy superintendents and also not only chief academic officers but also directors of curriculum and instruction and that sort of title.   So the CNI, folks.

As Sean and Michelle mentioned, this is only the first of three reports that we're going to be doing.   The first report is focusing on curriculum.   That was released in May.   The next report will be out this summer.   It will be focused on assessment.

Then the final report in the fall will be focused on professional development.   So here's what you see today.   You'll see some data on curriculum.   You'll see responses to three open-ended questions we asked for every episode of this series of reports.   These questions were what's your top curriculum problem?   Invent a product or service that could solve that problem.

And how much, if anything, would you be willing and able to pay per student for the product you just described?   We also asked, which company is best at solving curriculum

problems?   Again, that was open-ended, so we didn't give anybody any prompts or hints. They needed to come up with that response on their own.

We also asked a bit about purchase plans.   Finally we asked about progress towards digitization or having digital materials in the school district.   So I'm going to start with the main focus of the report, which was district leaders pain points and the solutions they proposed.   We took the open-ended questions and coded them by hands with multiple categories.

We came up with the categories by generating categories from the responses themselves, and so here are the categories we came up with for the top curriculum pain point.   The top pain point for district leaders is instructional challenges and the need for training and implementation time.   That was a major problem for almost half of the leaders when it came to curriculum.

Second biggest issue is lack of high quality curriculum and assessments aligned to standards.   Number three, the need for more personalization for resources that really engage students.

We also asked -- we also asked leaders to invent a new product or service that could solve the curriculum problem that they had just described.   So, again, here are some broad categories we put their answers into.   Leaders wanted high-quality standards aligned curricula.

They wanted an effective professional development to help them implement that curriculum, and they wanted apps, devices, tech tools or online rear sources to implement things in an effective and engaging way.   I'm going to turn it over now to Sean to talk a little bit about some of the responses themselves

>> SEAN CAVANAGH: So if we look at it in some detail at what these district leaders were telling us about the biggest problems, the answers are pretty revealing.   As Holly mentioned when we coded these responses, there was a big emphasis on instructional challenges, a big concern about lack of high-quality curriculum and lack of personalization.   You can definitely see these themes throughout the individual responses.

Here is a sample of some of what these folks told us about the biggest problems you see. One administrator writing in about the curriculum not being rigorous enough.   Another one is talking about companies designing their curriculum for an urban population.   You know, that probably doesn't meet the needs of all the districts that have very different needs.

Consistency and differentiation was another concern.   Finding a curriculum that builds great background knowledge.   You know, if we look at these responses on the biggest problems in curriculum, one common theme was that educators generally need more help interpreting and making sense of the curriculum.   They need help making it differentiated to meet individual students' needs.   You see that in some of the responses here on the screen.

You know, one district administrator is talking about the need to manage all the ancillary components to make sure they're used appropriately.   Here again, we see concerns about the alignment and standards, and another one talked about curriculum designed with universal learning, universal design for learning in mind.

When it came to solutions, you know, many of the same themes came forward.   Here you see one survey respondent mentioning an app to audit curriculum standards and learning targets, specific diagnostic tools.   It could pinpoint skill deficits for students.

Another one talking about an online curriculum adapted for varying levels.   So there was this desire for customization.   In many cases clearly some sort of tech-based customization in

the curriculum, which is the most likely way you'd be able to do that rather than through some kind of print product.   Some of the other proposed solutions focused on sort of usability of curriculum and flexibility of the curriculum.   Things that make it easier to use.

It's one thing to talk about a curriculum being implemented with fidelity, but for educators that's no easy feat, especially when they're counting on the curriculum to guide them through the semester or years' worth of work.   In some of these responses you hear them talk about flexibility in providing the focus on mastery-based learned or one-stop shop concept in terms of how it serves educators.

I'll turn things back over to Holly, who will go through some of the other results from our study in more detail.

>> HOLLY KURTZ: So when the rubber hits the road, how much are district leaders willing to pay for these solutions that came up?   We found a wide variety of responses.

A quarter said they would pay nothing at all for them.   But the median was $15 per pupil. Then we had a couple who said they'd pay $1 million per pupil.   Those are probably the jokesters in the group. $15 was the median per pupil that district leaders said they would pay for the solutions they created to their own top problems.

We also wanted to know which companies district leaders feel are best at solving curriculum problems.   As you can see from these percentages, the answers were really quite all over the place.   It wasn't like one company completely dominated.   The most common response that we got was Pearson with 4% of people who responded.

It was followed by a tie between HMH and Curriculum Associates.   We had Heinman Publishing, and we had a large tie for the next place.   There were also more than 30 companies that were mentioned that were only mentioned by one person each.

So it really sort of goes to sort of the general fragmentation of the curriculum marketplace to see all these different responses with no one player really dominating.   I'm going to turn now to something maybe a little more concrete, and that is the purchase plans the districts have when it comes to curriculum.   We're going to look at both OERs and paid products, but we start with paid products.   More than half of leaders say that their district's plan to push core, English/language arts and math curricula in the next two years.   The most common category they plan to purchase in is elementary English/language arts followed by elementary math.

More than half say they're districts plan to purchase supplemental English/language arts and math curricula in the next two years.   Again, elementary English/language arts is the most common category for the planned purchase followed by elementary math.   Again, these are paid products.   These are not OERs.

We found some interesting differences between adaptive states versus open territory states.   Adoption states are states that have some sort of state level list of products the districts are supposed to use to pay for their curriculum.   Open territory is just what it sounds like. Individual districts or even schools sometimes make their own decisions.   This is a map of the states as we define them for the purpose of the survey analysis.

You'll see the adoption states in blue and the gray ones are the open territory states. We got this from the association of American publishers.   We found that the demand for core paid English/language arts curriculum at the secondary level was stronger in the adoption states than in the open territory states by quite a bit.

We also found that in English/language arts the demand for supplemental curriculum was stronger in the adoption states both at the elementary level and at the secondary level.   The difference was particularly pronounced at the secondary level.   I'm going to turn now to paid individual lessons or units.

37% plan to purchase curriculum items this category in the next two years.   There wasn't much difference between the categories in terms of the percentage who plan to purchase different categories in terms of whether or not it was math or English/language arts or secondary or elementary.

Demand for individual elementary English/language arts lessons was stronger in adoption states, just similar to the way the demand was stronger for adoption states for the other products we discussed a second ago.   I'm going to turn to open educational resources, so these would be free products that can be re-used and repurposed legally by schools and school districts.

43% plan to acquire OER core curricula in the next three years.   The most common categories are comprehensive core curricula in elementary math and secondary math.   Even mother, 47% plan to acquire OER supplemental in the next two years.   Again, we see this is most common in math.

Core elementary OER English/language arts is in less demand in the northeast than in other areas of the country.   That's not a difference -- just as an aside, this is not something we saw with paid products.

The demand for supplemental OERs in English/language arts or math is also stronger in areas of the country other than the Northeast, so we see a much higher demand in the West, Midwest and South for these supplemental OERs than in the Northeast.

Core OER English/language arts demand is also stronger in high poverty districts, which possibly makes sense.   If they have less funding, they may be more open to free products.   I am going to switch now to progress towards digital, which is a sort of ongoing matter of interest for curriculum purveyors if schools are pretty attached to their paper and pencil resources.

We asked district leaders two years from now, which of the following curricula do you expect to be three-quarters or more digital in the school district?   Not surprising computer science and coding by far is three-quarters digital, and that was followed by college preparatory materials such as advanced placement materials.   District leaders were least likely to say that social/emotional learning would be digital or elementary language arts would be digital.

In general, districts were more confident that the secondary subjects would be nearly fully digital than the elementary subjects, and that's the concerns about screen time for younger children.   Progress towards digital material for English language learners was strongest in the West and South.   Those are also the areas that have the largest population of English language learners.

Progress towards digital science in English/language arts was strongest in the West.   And progress towards college prep digital materials was strongest in the South.   In smaller districts we see less progress towards 75% digital materials in secondary math and English/language arts. So we see the bigger districts are probably a little farther beyond the smaller districts when it comes to having digital materials for these core subjects.

We also see that progress towards digital English/language arts and secondary math is stronger in higher poverty districts.   I just threw a lot of data at you, so I'll go ahead and just

recap a little bit.

The top curricula problem for district leaders relates to instructional challenges such as the need of training and time for implementation. Their most commonly proposed solutions is standards-aligned curriculum and assess. That is high quality.

Leaders would pay a median of $15 per pupil for this solution.
Turning to spending plans when it comes to curriculum, more than half of administrators say their districts plan to purchase core or supplemental math or English/language arts curricula in the next two years. Just under half acquire core or supplemental OERs in the two subjects, again, in the next two years.

Finally, progress towards digital curricula varies widely by subject matter, region, district size, and district demographics. This is just a little bit of a sneak peek of what's coming next when it comes to our special reports.

I'm going to turn things back over now to Sean Cavanagh.

>> SEAN CAVANAGH: Great. Thank you, Holly. Holly went through a lot of the data with great clarity and took us through how we can interpret some of the numbers from our special report. We also did some reporting around this data in which we asked folks in the community, a lot of people leading some of the biggest professional associations of educators as well as other industry insiders about how to interpret what's going on in terms of this curriculum purchasing. Some of the things they told us is that they really see a strong demand for more support for educators for implementation.

In particular, educators struggle to make sense of these materials. They struggle for coherence in the curriculum. Teachers need a lot of guidance, and that they tend to look most favorably on curriculum providers that can give them more guidance throughout the semester. Part of the reason for that is simply that there's so many lessons in the curriculum, so much more material than educators can cover and know how to cover. So the more sense-making that a product provider can provide, the better off the educators are going to be in terms of using that curriculum.

We heard a demand for diagnostic and even interactive curriculum tools throughout our reporting, and that comes across in the data, too in the open-ended responses. So if we look at why districts might be planning on purchasing, you know, a lot of materials both at the core level and at the supplemental level over the next few years, one theory that some folks have put out there and I think this makes sense is that we're basically about seven to eight years removed from the initial wave of buying that was driven by the adoption of the Common Core standards.

When the Common Core passed, much like when No Child Left Behind passed, it led to this major demand for new materials to align to new standards. Given the districts are a cycle where they need new materials every five to seven years, we're probably at the point where many districts are looking for a major refresh of the materials. In terms of the demand for open educational resources, one of the findings in our report was that there did seem to be stronger demand in in the Western states.

Some of that could be explained by the fact that there are some pretty big statewide efforts to promote open educational resources in the West. Some of those states are participating in what was initially a federal-led effort focused on open educational resources. I know Washington state has been a big promoter of districts' experimentation with open resources, as has the state of Utah.

We also saw in our data that many impoverished districts are showing a pretty strong demand for taking up digital materials, more so than affluent districts. That, you know, was pretty consistent with what some association and industry folks told me about how they thought impoverished districts are more likely to experiment in this area. They're looking for solutions other than simply buying a lot of print materials.

One thing I will say about this wave of purchasing is that we did hear some frustration in our reporting with district officials saying, well, we purchased core curriculum, but what we don't want is to then have to make up ground by going in and filling a lot of gaps by purchasing supplemental materials or individual lessons to fill in for things that the core curriculum doesn't provide. That was a source of frustration.

And I'll now turn it over to my colleague, Michelle Davis, who will lead a Q & A.

\>> MICHELLE DAVIS: Thanks, Sean and Holly. I want to remind everyone you have scene and Holly here, so direct your questions to them. They have a lot of great information. Just type your question into the ask a question box on your screen.

I want to start with a question from Kathy, and then also sort of build on it. She wanted to know how in the survey you defined "OER."

Also, my question for both of you aside from that is, with this rise of OER, should commercial vendors view that as a threat or an opportunity? Have you seen vendors successfully sort of capitalize on OER for their own bottom lines?

\>> SEAN CAVANAGH: Well, I'll take the second one first, which is that in terms of if it's a threat or opportunity, it's probably both. We see a blurring the lines between so-called commercial and so-called open resources. There are open educational providers, nonprofits who are now partnering with commercial publishers, for instance, and I'm thinking of McGraw Hill. There was another provider, open up resources that partnered with Microsoft.

And many open educational resource providers are commercializing their products, mostly through creating wrap-around services that districts have to pay for. In other words, where the open educational resource is free and can be altered, but if you want support, if you want printing, if you want professional development, that comes with a cost. It's a way to create a sustainable business model around these resources.

Holly, do you know, did we define open educational resources in any particular detail, or do we leave that more open to interpretation.

\>> HOLLY KURTZ: I wanted to double-check on that. For this particular survey we didn't define open educational resources for the respondents.

\>> SEAN CAVANAGH: I'll say that sometimes the definition of OER varies a bit, but for of those who don't know, it's generally material that is not only free, but it's created on the license that allows for the materials to be slides and diced and altered. However a user sees fit in some cases by attributing with attribution to the original source. Some cases there are restrictions on commercial development but in other cases not.

\>> HOLLY KURTZ: I know from our reporting that sometimes the OER resources are criticized for being uneven or possibly low quality, which is where a commercial vendor can come in and make a mark supporting that content.

\>> SEAN CAVANAGH: Absolutely. That is one of the critiques that's been raised about open educational rear sources, somehow they're static and that a commercial provider, a traditional commercial provider has more time and effort and will put resources into revising

them.

I will say that this survey indicates to me that, you know, there's still work to be done by traditional commercial providers and a lot of open-ended responses from district administrators were saying, they're district commercial providers, and you need to give us more.   I think both sides have work to do.

>> MICHELLE DAVIS: This is another question from Warren who asked why affluent neighborhoods are moving away from digital curriculum.   I don't know that's what the research found.   I don't think it's affluent neighborhoods are moving away from that.   I think the impoverished districts are moving more quickly to digital.   Is that right, Holly?

>> HOLLY KURTZ: Yeah, that was a finding.   We found progress towards digital and English/language arts and in secondary math was stronger in high poverty districts.   You know, I think that is as the question complies that gets to some of the -- I think there was a "New York Times" story recent by about how very, very wealthy communities in Silicon Valley are moving away from digital materials and sending their children to a Waldorf School that doesn't necessarily embrace digital materials, especially when the children are very young.

You know, we took education week and we took a close look at that.   I would definitely recommend looking at that coverage.   You know, we found that the story was a bit more nuanced.   You do have high income school that was digital and a low poverty school was all print and paper.   It may be that it's a little bit more of -- it depends on the school and subtle and that sort of thing.   To me, what we're seeing and this slide makes sense because ultimately I would think it's less expensive to go all digital instead of, you know, doing all this printing and paper and having books around to replace all the time.   Especially with the advent of low-cost devices like, you know, the one that's most popular in schools right now is the ChromeBook.

I wonder if it might be a little bit of a way to save money.   The other thing I wonder is, you know, if high poverty districts want to give their kids more material at school because they don't feel like they have enough home access perhaps.   That's stronger in more affluent areas.   So those are just some of the -- that's the contextual points around this.

>> SEAN CAVANAGH: I was just going to add that one of the people I talked to for my story on the results was the executive director of the state educational technology directors association.   She made the point that what their organization is saying is that a lot of academically underperforming districts are often more willing to try interventions.   In some cases that means more digital enter very long.   That's another potential factor at work here.

>> HOLLY KURTZ: Just to follow up on that, Sean, I know this report found we talk a lot about digital tools and curriculum, districts still like their print materials.   How can companies kind of navigate that and figure out how much effort they should put into digital versus print?

>> SEAN CAVANAGH: I think the truth is a lot will vary by district, and you know, the truth is that a lot of -- some companies are in a much better position to do that than others.   Many bigger companies offer a package that is a mix of print and digital, whereas smaller providers tend to be focused more on the digital side.   I will say that what we hear again and again from district officials when they talk about the fundamental research that a company needs to do on them is try to understand their overall landscape and what the experience has been.

Is this a district that has fully embraced a big digital shift?   Is it one where parents and others in the community have resisted a focus on the use of devices?   Where are they, because

the more you understand about the context of that district, the more you'll understand about if you're a company what kind of specific products they want and where you're wasting your time.

>> MICHELLE DAVIS: I have two related questions, one from Ben and one from Bruce. About the $13 student cost the report came up with.   One person want to know if what does that mean if $15 is the median.   Most common vendors sell at twice this cost.   What makes a difference?   What's the $15, what would that cover generally would you think?   What kind of service would be included in that?

>> HOLLY KURTZ: That's hard to say.   People's responses to a question.   This was ray product they invented and they're always over the place with an open-ended question and calls on them to be creative.   For some people they meant an app, so maybe that's a reasonable price for a app.   Some thought it was a full curriculum that were high priorities and standards aligns with all the bells and whistles.   You know, I'm wondering -- you know, I think it's just sort of hard to say.   If we had given them a list of products, it would have been more easy to interpret.   Then we wouldn't have gotten to see what they came up with on their own.

>> SEAN CAVANAGH: The price might be somewhat aspirational.   An explosion of wish fulfillment there in terms of what they want to pay.   I know -- I think, you know, it would -- it's one of the realities is asking to survey like this.   People are going to live the price that they want to pay.   So I think that that's what might be reflected here.

>> MICHELLE DAVIS: This is a question from Nancy.   She commented that a lot of the data collected in the survey relates to math or English/language arts curriculum.   Is that how you asked the questions, or is that from the unprompted answers from respondents?

>> HOLLY KURTZ: I think she's talking about the spinning data.   Ha do you plan to buy in the next two years data?   That was our choice to focus on math and English/language arts honestly because the survey would have got too long considering the categories.

We chose to really zero in on those two subjects.   Obviously we could have asked about a lot of other subjects.   No, that's not cog from the respondent's.   It was a decision we ma I had to keep it manageable so people would actual maybe take it.

>> SEAN CAVANAGH: I will add that -- I was going to add one thing.   Here in the presentation we just gave a sample of the open-ended responses that people were provided. In the report, which I'm guessing a lot of folks in our audience have read, we on offer a sample there, too.   There's a full list of several hundred of these responses that people wrote in.

In many cases they're fascinating.   So in some cases I think that they did -- I'm pretty sure the people did mention other subjects in addition to math and ELA in terms of what they wanted.   If you're interested in seeing those, I'd say contact me or Holly, and we can talk to you about some of those more in-depth findings.

>> HOLLY KURTZ: I saw quite a bit people wants products, you know?   Like science and math, for instance.

>> HOLLY KURTZ: Products linked and played off of each other.   Exactly, yeah.

>> MICHELLE DAVIS: You talked some about the adoption states and open territory states.   Can you talk about how based on the data and some of this information a company might change its approach in the two types of states?

>> HOLLY KURTZ: I would think it would be a lot more systemic, you know, selling into an adoption state.   There's more of a preset list of what the districts are permitted to buy with their funding.   If you're not on the list, you could avoid the state entirely or which of your

products are on the list versus open territories literally all over the place.
It would require, I would think, more on the ground footwork.

>> SEAN CAVANAGH: I will just add that even in some of the biggest adoption states, the ones that everyone pays attention to, like California, Texas, and Florida, there's much more flexibility to stray from the state-adopted list than there ever has been in the past.   So vendors might think to themselves, how can I compete in those states against the big guns out there?

The truth is you have more opportunity to do that now than you ever have in the past. And the other thing that we found is that once you establish a foothold in the state, if you made the adopted list, the make-or-break moment really comes -- I turn back to implementation. Trying to get the word out about your product in individual districts that involves networking at conferences and events and other venues.

So in terms of strategy, it's not always about -- or it's less about it than it used to be.   I'm going into this state and not that state because there's more flexibility in the statement market in some respect than in the past.

>> MICHELLE DAVIS: I also noticed during your presentation that it seemed like there was a mismatch in terms of educators feeling like materials -- curriculum or materials matched state standards, even if they said sort of they did.   Is that something that vendors should focus on to make sure that there are aligned with state standards and that they're sort of marketing themselves appropriately?

>> SEAN CAVANAGH: I'll say that -- I mean, that clearly was a point of emphasis that came across in the data.   It makes sense, because, you know, the assessments are associated to math, the standards, and the curriculum is supposed to match the standards.
So, yeah, it's clearly a point of emphasis.   The standards -- the adoption of standards -- we've seen it in past surveys -- is often a huge driver of when districts end up making purchases.

So I mean, standard alignment is a big focus, and that's part of the reason we see some of these organizations like Ed Reports and others doing these reviews, and districts are paying attention to those reviews.   Yeah.

>> MICHELLE DAVIS: This is a good question from Mary about something we've written quite a bit about.   She wanted to know if the issue of a curriculum needing evidence or research to back it came up at all during these surveys or this survey?   That's something we've written a lot, that educators want evidence or want research to back up the effectiveness of them.   Was that raised by anyone in the survey?

>> SEAN CAVANAGH: I don't believe it was.   Not in the responses.   I'm sorry.   Not in the sort of multiple choice questions that came up in the open-ended responses, and they've been -- I will say that I do think that conducting surveys on educators and administrators demands for evidence is a bit tricky.

What I found in my reporting over the years is that the school district administrators talk about the need for research and evidence backing up a particular product.   They're buys and thinks of what they're buying.   In truth what guides the purchasing decisions is the experiences of districts that they know.

The peer-to-peer recommendation factor still outweighs evidence and research in the eyes of many district decision-makers.   I don't think the evidence question came up in the survey result in particular, but I would always interpret results ha speak to issues of evidence and research with some caution anyway.

>> MICHELLE DAVIS: Great.   I know this is a topic of a future report that EdWeek is doing.   Can you talk about the findings in PD in this, and how companies should view that in terms of putting out products and the kind of PD or support they provide to educators and to schools and districts using their products?

>> SEAN CAVANAGH: What I'll say is that, you know, our goal with the PD survey, was not the same way that -- it was very similar to the goal with the assessment of curriculum surveys, in that we wanted to address in simple terms the biggest challenging that districts face in PD.

And the solutions they want, and given all the very flavors of PD out there, I'm going to get that the results are going to be all over the map in terms of what people want.   Part of our goal is to provide some sort of clarity because we get a ton of questions at EdWeek Market Brief about the kind of PD they want.   Is it virtual or in person.   Is it in person?   Who delivers it?   Is it okay to have an outside consultant deliver the PD?   Should it be delivered by a coach, someone within the district?

So what we hope to do with the PD survey, which will come out around October, is lend some clarity to that issue.

>> MICHELLE DAVIS: I know also, you know, a lot of the respondents said that a lack of high-quality curriculum and assessment was a really big problem.   How concerned should vendors be that educators have this perception that a lot of what's on the market is not high quality?

>> HOLLY KURTZ: You know, we saw evidence of that also when we did our survey last year.   We asked district leaders to -- we asked what their most frequently used curriculum and assessment products were and we asked them to rate their satisfaction with the products.   They gave them pretty abysmal ratings.

You know, I think it -- across the board, you know, with maybe one or two exceptions.   So I think, you know, maybe on the one hand it should be a big concern.   On the other hand, I don't know that, you know, there's -- it's not district leaders say your product is not meeting my needs, but everybody is saying that this one particular type of product is meeting their needs.   Everything else isn't.

So it's not like there's one curriculum company kind of crushing the competition.   It's that there's this sort of general level of dissatisfaction with curriculum out there in the marketplace.

>> SEAN CAVANAGH: I would agree.   You know, when we did the survey last year, one of the take-aways was it was somewhat disparaging, I think, to, you know, a lot of district administrators I talked to as well as the countries, this wasn't an overwhelming endorsement of a lot of specifics or products or companies on the whole.   Some did stand out but for the most part, you know, as Holly mentioned, it was sort of a dark view of, you know, the quality.

That said, it also creates an opportunity.   If you're a curriculum company willing to try a different strategy and can break through, there seems to be a lot of potential to stand out in terms of gaining the confidence of district buyers.

>> MICHELLE DAVIS: Here's a question from Peter who wants to know whether there was a diagnostic assessments or model most mentioned in the survey?

>> SEAN CAVANAGH: The answer is no in terms of open-ended responses.   I'm pretty sure of that.   There was not one particular product.   That probably comes down to, you know,

a result of these folks were talking about the biggest problem they have.   So if there's something out there that a lot of districts liked, maybe they weren't inclined -- maybe they didn't know of it because they were searching for a solution.   Is that right, Holly?

>> HOLLY KURTZ: We ask them what the problem was and come up with a solution. We ask them what's the best solution on the market.   That kind of precluded people mentioning specific products for the most part.

>> MICHELLE DAVIS: One thing I noticed is that there were definitely a lot of different demands from different parts of the country.   That seemed particularly pronounced around supplemental materials.   How should vendors position themselves when it comes to that why might it be?

>> SEAN CAVANAGH: I'm not sure exactly.   Some of it could be that they're in a purchase cycle where they made -- they bought core curriculum, and they view the core materials as getting stagnant or out of date.   So they're purchasing supplemental materials to fill in the gaps.   Some of it could come down to individual state policies.   For instance, we see more states emphasizing the teaching for computer science Friday.   That has some connections to math.

It could be that the State but a new standards on a particular aspect on English/language arts or math and that's driving purchasing.   That's my theory on what might be occurring.

>> HOLLY KURTZ: One thing we saw.   This isn't core verse supplemental, but OER was a bit weaker in some categories in the Northeast, and that had made wonder if schools -- for the most part the highest funding, once you take into account cost of living adjustments are clustered in the Northeast.   They're less likely to look around for low cost products.   That's just a theory.

>> SEAN CAVANAGH: One factor there is biggest and perhaps most famous of all the open educational resources out there, engage New York, you know, is from the Northeast.   We say that -- we are resources, you know, gaining traction all over the country and around the world, actually.   It has a lot of take-up in New York, obviously.

>> HOLLY KURTZ: We talked about pricing earlier with the $15 pie in the sky what they pay for a product.   When it comes to pricing from your reporting, Sean, and the surveys you've done, Holly, how should vendors look at pricing and approach district pricing.   It seems like it might be kind of a sticky subtle.   This doesn't get to how much you should price, how much you should charge for the product.   One thing we see is that district leaders sort of consistently say that they want to know the price up front and want transparency.

They want it at the beginning of the process when they consider curriculum.   They don't want it after they found the finalists, and they want the pry to be even to find.   They want it on your website.   They want you to -- they want you to be trans parents about how much you charge there them for the lake.   For professional development, and that's one big bean we've seen.

They're more and more sort of efforts out there to make pricing a bit more transparent. So districts like noodle markets or other actuals are tools why people can look and see how much people are paying for different types of products.

>> SEAN CAVANAGH   I'd add one thing.   The issue of transparency and pricing comes across not just sort of in the purchase of individual products but also in kind of overall strategy for companies.   For instance, we've done a fair amount of reporting for what makes for a

successful pilot project.   One of the biggest frustrations among district officials about pilot projects is when a company will, you know, talk about one price during the pilot, perhaps a set of schools.

Then when it comes time for a full-blown implementation across the district, you know, the price changes quite a bit or there's something that hasn't been understood about the transparency of the pricing.   So that issue pervades a lot of the concerns that district officials have.   On pricing, keep an eye out for a new story we're going to publish in EdWeek Market Brief that draws from survey data on pricing, and that will go online tomorrow.

>> MICHELLE DAVIS: Great.   Everyone can check out the website for that tomorrow.

I want to thank both Holly and Sean for the fabulous information.   I want to recommend that everybody take a look at this report.   You can see a lot more detail and, you know, really dig into it.   It's K-12 leaders biggest problems in curriculum and the solutions they want. Again, it's part of a series of in-depth reports we'll be doing over the course of the year.

I want to remind everyone that if you want to watch today's presentation again, an on demands archive will be made available in the next 24 hours and you can visit our website to finds a lot of articles that we kind of touched on and mentioned that explore the topic and lots of related topics from today.   I want to thank everyone who attended, and thanks, again, to Sean and Holly.

(Webinar concluded)

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