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CRITICAL NEW INSIGHTS ON ESSA, SPECIAL EDUCATION PRODUCTS, AND
THE DISTRICT TECH LANDSCAPE

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    >> SEAN CAVENAGH: Hi, and welcome to our quarterly
briefing: Critical New Insights on ESSA, Special Education
Products, and the District Tech Landscape.
    I'm Sean Cavanagh and I'm the managing editor for EdWeek
Marketplace. Quarterly briefings are special presentations that
Market Brief offers exclusively to our members about critical
reporting analysis and research that we have conducted over the
past quarter. I know that the news in the education market
today has been dominated by the coronavirus and its sweeping
impact on schools. Much of what we're presenting today offers a
break from that. There are definitely connections are to
Covid-19 which we'll discuss. We'll talk about newly emerging
products and changes in the demand in the special education
sector.
    My other colleague will talk about every student
succeeding, that's taken affect this year and we'll give vendors
insights into school level purchasing. Before we begin, now is
a good time to review the technical aspects of today's briefing.
    Please check the audio setting on your computer as well as
your speaker volume settings if you are having any audio
trouble. If you are still having issues, please see the detailed

audio troubleshooting file, available in the Handouts folder at the bottom of the console. There also some other icons located at the bottom of the webinar console that open some additional feature panels. You can read about today's speakers in the bio panel and click the handouts panel to download a copy of today's slides. To submit a question for our speakers to answer during the Q&A session, type them in the Ask a Question box, located above the Chat Window. I'll repeat that, if you do, type them in the Q&A box located above the resource list window.

Finally, an on-demand archive of today's presentation will be available online in the next 24 hours. Both the archive, and a free-to-download version of the PowerPoint slides, will be accessible through edweek.org. I'll now turn it over to talk about how district demands are changing.

Go ahead.

>> MICHELLE DAVIS: Thank you, Sean. So I'm talking about the trend in the special education market.

As we all know, right now, the entire education landscape has changed with the impact from the coronavirus and all of the school closures. So I wanted to start by talking about how that impact is playing out in special education.

So there are a lot of challenges right now for companies that are serving special education students. Obviously, one of them, it is that schools are closed. If you haven't seen it, Education Week has a really amazing realtime map of school district closures that tracks this state by state. It really is an incredible resource. If you haven't seen, it I urge you to take a look. I looked at it today, as of today, school closures due to the coronavirus have impacted at least 124,000 U.S. public and private schools and affected at least 55.1 million students. So that's a lot. One of the issues that companies are dealing with, it is how to deliver their services to special education students. Many of the students often get their services delivered by trained educators, paraeducators, therapists, specialist, and those services, they're often delivered in person, in school, and they may not translate to a digital environment in an obvious way. Federal law obviously mandates that individuals with disabilities have an equal opportunity to participate in everything that schools provide, including online learning. Districts are trying to figure out how that translates into the reality where schools are closed. In some cases, districts have not moved forward with online learning because they're not sure how to provide that equal opportunity for students with disabilities and special education students.

Last week, the U.S. Department of Education released a fact sheet hoping to help districts sort of clarify how this should

proceed. The fact sheet promised some flexibility, but emphasized that special education students still had to have that equal opportunity to participate in education. It clarified some things and also left some schools and districts a little bit confused. Now we have the coronavirus stimulus bill making its way through Congress. That could give the Secretary of Education the ability to issue wavers to schools and districts around services to special education students. They haven't really clarified what that means and that's raising concerns for some special education advocates.

What I think is the big headline out of all of this, this shift to widespread online learning that for special education students, that's really going to mean a move from teacher delivery of services to a parental model of delivery of services. Parents are going to be much more involved in the educational process for students at home, and that's a really different way of using products and delivering these types of services in education.

What can companies do? What should they do in this new sort of changed reality? I recently had a great discussion with Kevin, the founding partner at ARK capital development, a venture capital firm that specializes in the special education market. They have at least 30 special education companies in their portfolio. He gave me a lot of really great information. He told me there are a lot of things that companies serving special education students or that sell products for these types of students, they can do in this market. That there is actually a big demand for products that serve this group right now. The first thing he recommended, it is to make sure that companies have more of a parent-facing product or service. If you usually market mostly to schools and districts and educators, it might be important to shift or start thinking about marketing to parents directly, and having a way for parents to get your product or services -- or service directly.

That also might mean that you're going to have to have additional or new type of support for parents who are using your product. Those types of supports, they're probably going to be different than the kind of professional development that you might already have in place for educators. You might need to add to your support team, your communications team, or create some really simple understandable how-to videos to lead parents along in a way that you may not have to do for teachers because they already have a lot of training in these types of areas.

Another shift, that some companies are making, in this sort of new reality, it is to help find ways to support teachers who are now supporting parents. A lot of model for this education is going to be teachers helping parents deliver these services

at home. They're going to be providing the services to their child, but under the tutoring and instruction of teachers. This is a real different role for teachers, you have to keep that in mind.

Parents are going to be relying on educators for information about how to help their child with dyslexia, for example, get through their homework, their reading assignments online. Educators are going to need a lot of guidance in that area.

Another area that companies can help with, help parents with, it is to find out where money is flowing and help guide parents to the funding and that funding can be used to pay for devices and other equipment that can help educate special education students at home. Maybe a student usually uses a telecommunication device at school, but they left it at school, it is not at home. Some states are offering up emergency education funding to help parents buy that device or access this curriculum or product at home. Kevin Koster told me a story about a company in his portfolio that's actually hired a bunch of what they're calling family advocates, and they're screening families to see if they would qualify for state funds. I think it was particularly in Texas, that could allow them to purchase services or equipment directly for the special education students that are learning at home. Then the family advocate will screen them, if they think that the family qualifies, they'll guide the parents through the funding process and then the parents can buy their product. It is kind of just one way that one company is navigating this.

That's a take on what's going on in response to schools being closed around the coronavirus. Now I want to talk a little bit about the special education market in general, sort of independent of the coronavirus situation.

I did a story earlier this year that touched on five categories of products that were driving the special education market and what educators were really looking for and what's likely to show up in classrooms in the coming year.

The first category that I looked at, that I want to highlight, it is augmented and virtual reality products. The costs of these devices, they're really coming down to making them a lot more affordable for schools and districts to use in the classroom. Educators are seeking them out, they're in demand, there is a great use for some of these products with special education students, for example, the virtual reality product can allow students with autism to practice their social skills and real world interactions in really a safe environment so students can do a virtual school trip to the zoo for example to prepare them for the real thing. They can practice their

social queues in a realistic environment. Some of these, they're really, really helpful to students and they're becoming more in demand in schools.

Some of these tools, like a Google cardboard viewer for example can let students with disabilities maybe visit a place virtually that may not be accessible otherwise. There is lots of different uses for these types of products.

There are a lot of augmented reality products showing up in classes as price points come down allowing for hands-on learning to make concepts more understandable. You know, it is really worth mentioning -- I'll get back to this later on, but it is worth mentioning -- that a lot of the products, they're great for use by special education students but they're excellent for use for all students as well. One example, it is a product, Element 4G. It has an app that the intent is to help students grasp the idea of scientific elements better. So students use this app with their device, then they print out a paper cube and if they view the cube through the app, for example, a scientific element like H20 will show up as water. It just helps them really grasp the idea a little better. It is more hands on, more sort of -- it gives better examples.

That's just an example of one type of product that's out there.

I want to talk a little bit about professional development too. There is a big demand for professional development around the products, especially as the new technology emerges. You can see this quote from lieu Yan Purcell from the council of administrators of special education that says what I hear is that there is great stuff out there in AR/VR and there is not enough effort to put into training teachers on how to actually use it. This is an issue with a lot of technology. Particularly here, it is that augmented and virtual reality, it is really cool, there is these great apps, interesting things to do, but it is really important that they're not just fun to use, that teachers are using them for learning and incorporating them effectively for deeper learning for the students. It shouldn't just be a fun thing to do. That doesn't really help the student.

So it is really important for companies to focus on professional development along with these cool new technologies and trends.

A second area that I focused on, in the story that I wrote earlier this year, it was a big, huge demand for products that ease educator's workloads. If you talk to anyone that works in special education, you'll hear complaints about the paperwork. IEPs, 504s, all of that, it requires a lot of paperwork. Anything that can automate some of the record keeping and

paperwork functions is of huge value. There are products out there today that even integrate with federal and state requirements. Teachers don't forget to check a box, leave out some piece of information that's needed that could happen when you're working in a paper-based form.

Some of these apps for teachers have checklists so that when a student meets a goal, accomplishes a task, the app automatically generates a report that's required and so it is not this added extra step for the teacher. It really helps with the administrative tasks. For example, there is a company Vizel with a product at a automatically collects data for IEPs and uses that data to help teachers determine student proficiency around goals and objectives. Some of these products actually also allow for better data collection across classrooms, schools, districts. So administrators, they can kind of compare how different schools are doing with their special education students. They can see where techniques are more successful, where either a school, a classroom needs more help. It really allows an administrator to get a wider view on how the students are getting educated in the school or district.

I also want to talk about this idea of using Ed Tech for all students. We find that districts don't necessarily want to purchase these separate products, specifically for different populations of students. They prefer to have one product that is accessible to both the general population and to special education students. A lot of students, a lot of special education students are learning in the general environment, they want to use the same products as the peers in their classroom. There is really a lot of emphasis on making products truly accessible for a wide range of students. This is one example, text help, there is a math product, Equatio, it is spoken allowed for students for math problem, the interesting thing, a lot of these accessibility supports, they're great for all students, not just students with disabilities or special education students. They really -- they improve learning for everybody. We are seeing that schools and districts really don't want to buy products if they can help -- buy products separate if they can help it, they want a whole product that will apply to lots of different groups. Here is just sort of a cautionary sale, my colleague wrote a story a while back that found that companies that don't put efforts into making their products more accessible to students with disabilities, they really run the risk of alienating a lot of customers. It is really something to think about. One other thing to think about, it is not just about saying my product is accessible by tacking on, you know, closed captioning, something like that, you really have to be thoughtful about creating a product that's

truly accessible, not just an add-on, an afterthought.

Another area where there's big demand for products, it is preparing students for independence and for the future of work.

Special education students are getting older, students with disabilities are getting older, families want them to be prepared for college and career, just like all the other students out there. There's a growing need for products and services that can help students prepare. There's a need for tools that help with independence and that might be, you know, verb wall calendars, schedules on apps, help with daily tasks, like learning to dress, make lunch, and some of these products, they're even for students who are going into the workplace so they can provide some advice for an autistic student that's dealing with a boss or has to make a PowerPoint presentation. These types of products, they're becoming more in demand over time.

There is even a product that's called life Sherpa, a virtual coach to support life tasks, school, workplace. It really gives a student or a young adult help with navigating a lot of sort of the life things that come up as you go through school and to work.

I also want to talk about this issue of evidence of effectiveness. It is a big deal for all of these products.

So the federal student, every student succeed act, it really emphasizes the use of evidence-based interventions to improve student outcomes. So states are really prioritizing -- states and districts are prioritizing this proof of effectiveness. States have developed lists of approved vendors that meet that product F you get your product on the list, it is a great thing, because some states require their districts to choose products off of the lists. Other states, it is optional. A lot of districts, they do choose off the list, they know they have been vetted for this evidence of effectiveness. Districts are also sometimes writing this requirement into their RFPs. It is really important to have some evidence to be able to present it and to meet this ESSA requirement here. Some organizations, they're collecting or creating collections of approved products, specifically for special education students, case, the organization I mentioned earlier, they have created an endorsement program, they do a deep dive into the evidence of effectiveness for a product aimed at special education students. This list, it is really in high demand by districts and the organization's members, they know it has been specifically looked at through this lens of serving this population. Districts don't often have the capacity, the bandwidth to do this type of deep dive research themselves.

So here it is just a list of some EdWeek Market Brief

stories we have written on this topic if you want to do additional reading. Some of these stories I mentioned earlier, but it is definitely providing sort of some guidance on a lot of the areas that I touched on and thank you so much. I'm going to pass it back to Sean.

>> SEAN CAVANAGH: Thank you. That was terrific.

I'll now turn it over to Brian Bradley who will talk about recent rule change in ESSA that has taken effect which has implications for vendors. Brian has done great reporting in this area. Take it away, Brian.

>> BRIAN BRADLEY: Thank you.

As Sean mentioned, there was a rule change in ESSA to report financial data as a per school, per pupil level. The data must be de segregated by state, federal, local funding sources as well, as well as personnel and non-personnel expenditures. Previously this had been done on a per district per pupil level. The per pupil per school level, a lot more granular than the previous requirement.

So U.S. education secretary Betsy DeVos set a deadline of this school year for publication of the data with regard to how coronavirus may impact state's ability to meet this requirement, I heard from a U.S. Department of Education official this week that no state has informed the department they're unable to meet the deadline of this school year. Obviously, the situation, it is changing by the day.

We'll be contacting the U.S. Department of Education, checking up with them to see if they do plan to change this deadline at all.

Or if any state has contacted the department requesting any sort of postponement. As I mentioned before, up until this school year, per pupil, per district financial reporting was the requirement, we increased granularity of the per school reporting requirement, we'll give vendors insight into where districts' priorities lie, additional insight into where it lies, including with equity.

Before I get into this graph, I wanted to highlight a recent Education Week research center poll of over 800 district officials which indicated that equity for all students rank only behind student achievement in terms of how those district leaders expect products and services they buy to improve in the districts.

As our colleague Michelle had reported earlier this month, education companies should be prepared to answer the question on how the product and service will help districts address equity issues.

The poll highlights the relevance, the equity gaps that are exposed, that they'll have on businesses, that are looking for

innovative ways to market the products and offer them to districts that most need them. You can see on the graph here, definitions of equity differs among the district leaders but this should give you an idea of what they're looking for businesses to provide when it comes to promoting equity.

Where ESSA is a measuring stick, a measuring stick for equity, giving straightforward insight into where districts are prioritizing expenditures and the relationships between the priorities and achievement indicators in every school. So vendors can correlate the outcome data with per school per student funding statistics and have more detailed oriented conversations on how the products will help districts and getting higher return on investment in terms of student achievement. In addition to reporting on per school finances, ESSA includes several requirements for reporting on achievement. Including the state designed long-term goals for academic achievement, graduation rates and English learners, including measurements of interim gross. In addition to this indicator published on a per school basis or these indicators published on a per school data, the data will be desegregated by racial and ethnic group, by children with disabilities, English learners and economically disadvantaged students. If student achievement is lower at schools that are better funded on a per pupil basis, how does the district participate in the information needed by their student? Data reporting required by ESSA could spark conversations like this.

Another poll we did last year, it showed that district leaders place a higher priority on obtaining student achievement data than they do on obtaining product performance data. Just 28% of district leaders in that poll said they have a big need for data on product performance versus 46% who said they have a need for student achievement data. So we know that district officials pay close attention to achievement data. If companies bring in specific achievement data to the conversations with districts, it could be one deciding factor that sets them apart from a field of interested vendors on specific contracts.

On the flip side of the vender opportunity conversation, the financial reporting requirements could prompt districts to look more closely at whether products are meeting an adequate level of productivity. Or if the districts are purchasing at the right price points. It is possible districts will sharpen focus on productivity with a correlated achievement data which will show equity and achievement gaps more deeply.

Vendors should also be aware, Washington state plans to breakdown the financial data to a sub object level where it bricks out expenditures for the specific types of supplies and purchases and contract services. The state will do this in

spring 2021. The state is taking initiative to publish data more granular than required by ESSA to promote transparency as they told me for the story I wrote earlier this year. If any other state education agencies are listening, planning to break out the financial data to such a granular level, feel free to let us know about your plan, we would love to hear them.

I don't want to overstate the new data that will be available for states to implement the reporting requirements of ESA, data may not be as granular as venders would like as it is not requiring states to be as granular as Washington state. A math curriculum will not be able to see how much districts are spending on the math curriculum products, being sure to clarify that.

A unique thing, vendors will bring more social benefit and will go deeper in conversations with districts by suggesting how districts may shift funds to meet specific educational needs.

The data will give valuable insights into spending on the perspective of inside of the school district. With that, I'll turn it back over to Sean.

>> SEAN CAVANAGH: Thanks. Appreciate it.

I will talk a little bit about some research that EdWeek Market Brief has collected about a broader topic, sort of the overall tech landscape in districts around the country.

This is based on a nationwide survey that we conducted of district administrators last year. It is most of our member, they know, a Market Brief, we're constantly putting surveys in the field. Mostly to district administrators, but also to principals and to teachers when we think that doing so will provide some insights to our audience.

When we look at the overall district tech landscape, this is particularly relevant to companies offering digital products, obviously, they're trying to figure out the strategy in terms of where districts are going to have the capacity to implement those products and this is also great intel for companies to have at their disposal right now as they figure out what kinds of capacity for online learning K-12 systems have at various grade levels because online learning, it is -- you know, Michelle mentioned, it has become so much more critical during this new era of the coronavirus..

A couple of questions that we were seeking to answer through our collection of data was how common are 1-to-1 programs? Just so we're on the same page, I think most of you probably know here, when we talk about a 1-to-1 programs, we're talking about 1 device per student although there are variations on that now that -- that's the general standard we're talking about. Our data looked at what are the differences in 1-to-1 programs by grade level. What kinds of devices delivered by

different companies are most common in school districts. Let's go through some of that data.

Actually, before we do that, I wanted to mention -- so -- sort of why does this matter? An overall reason why this matters is that district connectivity, previous research has shown, has soared over time but there is some data that's been released that shows high speed connectivity has greatly improved. It also is important to know, you know, at what grade levels companies can rollout their products, and in particular, where do districts have the devices necessary to implement ambitious types of educational technology. We also wanted to breakdown sort of what are the differences between smaller, rural districts and larger districts for ED-tech tools. Here you can see some of the data that we collected.

The question we ask, it is please describe your districts' overall technology environment and select all that applied.

Again, it was a survey, 500 district administrators around the country, so just to look at the results, you see in terms of type of device, type of company offered by different companies, Chromebooks, they were dominant. I know that won't surprise some folks in our audience that's been following the device market. Chromebooks, they have really taken off over the past five to six years main districts are quite reliant on them. You have to go pretty far down in terms of the people who responded by saying that Apple was, you know, the primary device they're using at all schools, and then Microsoft was a bit further down the list.

We also asked about -- as I mentioned, how common are one to one programs. Let's go through some of those results.

You will see that -- we asked about whether you have a setup for one to one devices, at the high school level, middle school level, elementary school level. The basic finding you will see, it is most common at the high school level, at 19% followed by at the middle school level at 15% and then just 5% say they're using the devices at the elementary school level only..

To go through a few key takeaways here, when we ask this question, we found that 86% of district leaders say they have one to one programs at some grade level, but just -- that's any grade level across the board.

Just 28% say that they have 1-to-1 programs at every grade level. As I mentioned, just 19% are 1-to-1 only at the high school level, 15% at 1-to-1 only at the middle school level, and just 5% at the elementary school level.

Just to go over this, one more time, when we look at what companies dominate the market, Google is on top by far, followed by Apple, followed by Microsoft. It is important to note that

40% of districts we survey say they use a mix of different devices across schools and that this data point very much resonates with what we hear interviews with district officials.

Many districts really have gotten to the point where they mix and match devices based on what the administrators want, what school principals want and what educators want. Those can be very different things. I want to note striking references we saw in the device landscape between large and small districts. Smaller districts according to our data, they were more likely than large ones to be 1-to-1 at all grade levels. In smaller districts, they were much more likely to be Chromebook districts than were large ones, larger districts. But, at the same time, it didn't matter what the size was, all of these districts reported using a mix of devices to a pretty great extent. By small districts we're talking about 2500 students total enrollment, large ones, so,000 or more students -- 10 -- keep in mind, 75% of the districts in the United States have 2500 or fewer students.

I also wanted to quickly go over, this is a quarterly briefing, some highlights from Market Brief's coverage over the past few months. You will see here, we did a story about the future of work and how it is changing the types of curriculum products that companies are offering and other products and how companies are responding to the demands in districts.

Brian did a story on Amazon's growing role in purchasing in many of the nation's districts. You know, he talked to not only the district officials who were buying these products -- routing their purchases through Amazon, but others who studied Amazon and in some cases have been critical of Amazon.

Michelle did a story recently that looked at new strategies for companies in digital marketing, and some of the innovative approaches that are underway there. My colleague Michelle Mulner whose is not on the line but is present in spirit did a story on where education companies get their best ideas. She was talking to CEOs of the companies, Michelle has done a great amount of reporting, talking to company leaders about the challenges they face, you know, their innovations, attempts to make good hires, so on.

>> A couple of other highlights. We did a story recently on -- this was based on a nationwide survey we did on how the next generation science standards are shaping purchasing. We have also been following a major change in Texas, it is -- Texas, they overhauled their law as it relates to reading instruction as part of a broader piece of legislation that increased funding for schools. That law will have implications for years to come in Texas.

Brian did -- has done a couple of stories on how the law

has changed the Texas market.

We also had a story about companies responding to RFPs and trying to figure out what districts are looking for in an RPF and what is absolutely critical mistakes that companies sometimes make.

If you missed it, late last year, we also put together a webinar in which we looked at evidence standards which Michelle was alluding to in this briefing, but was looking at the authority that's given to states in this area and what some of the standards are for evidence that districts are going to be -- that districts are already putting on companies.

So with that, we have got time for Q&A here. If you want to ask a question, you can type it in the Q&A box located above the resource list window on your screen. I'm going to start by asking my colleague Michelle Davis a question. Michelle, you talked obviously about, you know, the needs of the special education population and how they're changing during this crazy time where there's all of this online learning, remote learning, my question to you would be, do you think that the needs that families, students have now, given on lean learning -- is that going to lead them to have to turn to more kind of general education products and services or are the needs of the special education population simply too specific, that there is no way that the products and services offered by companies that aren't really special ed focused could meet the needs? Where do you come down on that?

>> MICHELLE DAVIS: I think the answer is probably both. There are products out there for the general population that I think would work for different aspects of special education students, especially if they have accessibility and supports built in which some companies really have paid close attention to this. They have really emphasized it. I do think there is going to be a need for some real specialty, you know, products, some niche products, especially this environment.

I was talking to a company a couple of days ago, I think they focus on vocabulary building skills. They have a lot -- they work with a lot of special education students. There is a demand for the product, it is just going sky high. So I really think that districts right now are looking for products that will allow them to satisfy the equitable education requirement instead of a law. So I think there is just a huge need for the specialty products as well as for parents locking for products that might work for them in a general way also in a more specific way as well.

I actually had a question for you, Sean: Based on your presentation, I wanted to ask based on the survey, the results about districts that have 1-to-1, types of districts, type of

devices that they're using, what kind of baring do you think
that has in this time as schools are shutting down and everyone
is switching to remote learning? Obviously, the schools and
districts that have 1-to-1 are in good shape. It didn't seem
like from the polling results that that was a majority of
districts in the country?
     >> SEAN CAVANAGH: That's right. I think that there are
particular implications at the elementary school level where
1-to-1 is much less prevalent. I think that many districts will
have to scramble to figure out what to do   with younger
students and it could be that the option is that -- okay -- we
think parents have devices at home, we can deliver online
lessons to the devices that parents own. That's happening in my
house. A broader issue here, and this is something we have
reported on for Market Brief as well as in Ed Week has reported
on this, all of these equity concerns that are related to device
issues. Many students may not have reliable connectivity at
home if they have -- you know, especially if they're from an
impoverished background. You know, there may be equity involved
in terms of if devices are delivered to homes where English is
not the first language. I think those are all relevant
questions. I think generally speaking, you know, it would
appear, if you are offering the digital products at upper grade
levels, districts would appear to have the infrastructure, a
better infrastructure to deliver what you're offering. At
younger grade levels, I'm not so sure.
     Brian, let me ask you a question, you talked about this
data that states are making available, right now, at the school
level, I know this is speculative, but from the people you talk
to, how easy or difficult will it be for vendors do you think
for making sense of this data and to do something with it that's
actionable? Will they be confused by this data? Totally
bewildered or easily interpretable? Somewhere in between?
What's the sense that have.
     >> BRIAN BRADLEY: It will take did he going. There is no
sort of set template for the report cards that states have to
release. The requirement is that they include the required
data. Some states have rolled out this data. They have rolled
out report cards, by last count, it is 26 of them. You know,
obviously, we're waiting on the other 24. What will that look
like? You know, how many links will you have to click on to
find the per school per pupil financial reports? It is going to
take some digging for sure. It is hard to tell just how much
digging will be required. The fact that this -- the fact that
this is out there, it will be a huge benefit.
     If vendors can find it. I think it sort of add as new
layer to the conversation when you're marketing the products and

trying to build the relationships with districts about what you can offer and how you can improve -- improve the learning experience for students at particular schools.

      >> Right. Right.

      That makes -- that makes total sense.

      Michelle, I wanted to ask you about something that came up in your presentation. We were talking about how more and more school districts don't want to purchase separate products for special education students you know, there is an emphasis on allowing students with disabilities to use the same tools, products as traditional students. What's the reason most school districts don't want to purchase separate products for special education? Is it for budgetary reasons, is it this -- you know, this concept of integrating special education students into the mainstream classroom? What's the rationale behind that?

      >> MICHELLE DAVIS: I think there are a couple of things. One, it is definitely the feeling that they want -- that educators want special education students to be incorporated into general classes with supports.

      So if everybody is using in the class, they're using one reading program, one curriculum, one digital program and then the special education student has to login to something completely different, that's -- you know, isolating, it also is difficult for the teacher. One of the big issues, it is to be able to compare data to not have to login and out of different programs and, of course, this issue of interoperability that we have written about many, many times, it is these programs and these products, they often don't work together very well, they can't trade data, they can't incorporate data very easily from other places. Teachers want to be able to see a dashboard of all of their students, especially if students are incorporated in the general classes, and how those students are doing.

      Obviously, there are going to be products, specialized products that students with disabilities need and that special education students need that are separate from other students. I think, you know, a big issue, it is that districts don't want to be buying so many separate products. I think we have found also in our reporting from the last couple of years that there was so much purchasing of products by individual teachers, individual schools that districts really found they didn't even know what they had and they were paying for products that did the same thing. They were being used in one sinkhole here, one school there, and I think there's a real effort on behalf of school districts in the last couple of years to do an vin tore of all the digital products that they're using and to really streamline that and simplify it to make sure that they're getting the most use out of the products that they choose to

have.

As a result of that, I'm really seeing districts want to sort of narrow down the number of products they're using, obviously they want to make sure they're serving all the students, but if they can, if there is a product that they can use across the board with ELL students, with regular students, within the classroom, with students with disabilities, with all of these different populations and they have different supports for the different populations, I think that's going to be a very attractive product to a district.

>> MICHELLE DAVIS: Yes. Thank you.

We had up with question roll in from the audience. This person is asking have your interviews touched on satisfaction with Google versus Microsoft and Apple products? I'm curious if Chromebooks will be the market leader going forward.

The answer is yes, we have done some research on that. In a special report that we did, it was about a year and a half ago, it came out, we had looked at all of these companies, Google, Apple, Microsoft, how the products are perceived in the market and generally speaking, we did find that Google faired very well in terms of satisfaction. Particularly as it relates to the usability of its products, the ease of use. There were other areas where it also ranked high, it also ranked well in terms of cost, which is perhaps not surprising considering Chromebooks, Apple, Microsoft, they did do fairly well in some other areas, in terms of product satisfaction, but Google did really well in terms of how pleased districts were with the specific products. Yeah. If there is -- I can also -- for the person that wrote in, if you would like to see a copy of that special report, employees email me and I will send it your way.

Brian, I wanted to ask you, I mean, you talk about companies making use of the school level data. Can you think of any examples for how a company may look at some of this data, use some of this data and make any kind of a decision about we're going to change this strategy or try to do this differently in the kinds of products we develop. How might they look at that data and make practical use of it.

>> BRIAN BRADLEY: I think it all goes back to achievement. If you can correlate the financial data with student achievement statistics such as progress of the English language learning, do you have -- do you have learning products that can help with that? Do you have a product that might be able to help particular schools that might not be progressing as much in that area as the districts would like? Do you have -- you know, another part of the achievement data, disaggregate by students with disabilities? Do you have a product that can help with learning, help students with disabilities learn? So this is --

you know, this is going to allow vendors to be a lot more
specific and bring up the needs of students in specific schools
as described by the different achievement data required by ESSA.
It is just sort of -- it is sort of a different approach, a more
specific targeted approach and I think you can get at it with
this, with this new information.
        >> SEAN CAVANAGH: Make as sense. We're running against the
end of our allotted time. Thank you, Michelle, broken, thank
you for your contributions and for all of the people that bowed
questions in the webinar -- posed questions -- I responded to a
couple of you online. If it is a question I couldn't answer,
you can also email me and I'm happy to get back to you after the
webinar.
        So one thing, I would like to remind you, few want to watch
the briefing again, an on-demand archive will be available over
the next 24 hours on marketbrief.edweek.org, and you can also
visit to find articles that have these topics covered.
        Thank you, Michelle, Brian. And thank you all for
listening. We'll talk to you soon.
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