Schoolzilla

QUESTIONS SAVVY SCHOOL DISTRICTS ASK VENDORS (AND THEMSELVES) WHEN SHOPPING FOR TECHNOLOGY

With multiple stakeholders, tight budgets, legal obligations, and many choices out there, it can be hard to select the right tool—much less do so swiftly and smoothly. The school districts that are best able to do so ask great questions of vendors and themselves. As a result, they're able to predict timelines, cultivate buy-in, mitigate barriers, detect deal-breakers, and, above all, make decisions that serve their district well.

Before You Shop: Needs Assessment

We highly recommend you start this process with a strong understanding of what you're hoping a new product will help you accomplish for your students and why a new product is the best way to achieve that. For that reason, it's worth spending the time on a proper needs assessment (click here for a handy guide) before talking with vendors.

Phase 1: Map Out the Process

You might be eager to embark on your hunt for the perfect tool. We understand it can be tempting, but take a moment instead to consider what it will take for your district to reach a conclusion. This step will ensure you don't run up against barriers that throw your timeline off.

Ask yourself the following:

- *Is the same team looking to make multiple new technology purchases? Is one dependent on the other? How much change do we have the capacity to manage well in a given school year?* If you're making multiple changes in your technology ecosystem, it makes sense to explore the options in parallel. Conversely, implementing and sustaining simultaneous system transitions might stretch your team's capacity and your district's tolerance for change. Shop with both in mind, but consider staggering rollouts.
- *Does our board need to approve this purchase? What is its meeting schedule? How do we get on the agenda? How far in advance? How soon in advance of a meeting must materials be submitted?* Board approval might feel far in the future now, but you'll thank yourself for having read up on the procedures when your new tool is up for a vote.
- *At what point must we use a request for proposal (RFP)? What is the RFP minimum? Who makes the final decision?* (If this is the board, see above.) *What ethical guidelines must we abide by during this process?* In many cases, districts require their employees to restrict their communication with vendors during formal procurement processes for ethical reasons. Find out what's required of you so you can get the information you need in appropriate ways and times.
- *Do we have funds to make a purchase now or will this be a part of the upcoming year's budget? When must our team's budget be submitted? When does the board (or appropriate authority) approve the budget? When does the fiscal year start?* Purchasing timelines don't have to halt your process now (nor should they), but they can delay its conclusion. See the "Creative Funding Solutions" sidebar for workarounds.
- *Is the key decision maker likely to leave? What about the person likely to be implementing this project? If so, when might that happen?* These are never pleasant questions to consider, but departures can present a challenge if they happen in your district. Design your timeline—including implementation—to wrap up before you anticipate transitions might occur, or come up with a contingency plan.
- *What's my timeline for reaching a decision*? Start by working backward from the date you decided you would like end users to be using this tool. Then take seasons into account. Assume progress will move more slowly during back-to-school season, winter holidays, testing season, and early summer. Typically, RFP processes take much more time than other purchases, so if you need one, elongate your timeline accordingly. The same is true to a lesser extent of board decisions. Finally, assume timelines will get pushed back and build in a little cushion for the unforeseen.

Phase 2: Meet and Greet

Websites can only tell you so much. Once you know enough to believe there's a potential fit, ask for an introductory phone call with a sales representative. These conversations are likely to be high level; the purpose of them is to understand each other's interests and determine whether there's potential for a fit.

Ask yourself the following:

- *Who's the best person to hold initial calls?* Start with just one person and bring in others later in the process to spare their calendars.
- *Does the vendor know what I'm looking for?* Send over a high-level summary of your needs assessment beforehand so the salesperson can cut straight to your situation rather than spending time on the basics.
- *How well do they listen to me?* The answer can be indicative of the type of relationship you'll have if/when you get going.

Ask the vendor the following:

- *What experience do you have working in a K–12 education setting?* This is an especially important question to ask if the vendor does not work exclusively in education. It's all too easy for general providers to imagine that you're simply "in a different vertical" and discount the ways in which school district objectives, needs, and processes differ from the rest of their customer base.
- *What is your typical implementation timeline for a district like ours?* For now, this question is just to check against your original timeline. If it doesn't fit, ask your salesperson for advice—he/she has likely seen this before.
- *What is a ballpark price for districts like mine*? You don't want to invest too much time in a vendor who's drastically out of your price range, but don't sweat over the pennies until you've spent a little more time understanding the capabilities you would (or wouldn't) get in return.
- *Do you have a self-guided demo I can use to test-drive the product myself?* Before you bring in your colleagues, give the product a basic pressure test by exploring it yourself!
- *What other districts like ours do you work with? How big is your customer base?* There isn't one right answer here, but there are pros and cons. With a newer, smaller vendor, your district may be able to have a bigger influence on the product's development. If you're the first district in your state to sign up, you may be able to negotiate a discount based on helping the vendor expand into new territory. In contrast, a more established vendor is more likely to be able to provide references from districts you know personally.
- *Can you give me any examples of districts that have chosen not to renew with you? When districts make that choice, what are the most common reasons?* Use this opportunity to see how vendors reflect on their product's weaknesses and what improvements they have made or are making to their product in response.
- *Would you mind sharing summary materials after the call?* The next meeting will be even more productive if you have a little help catching your colleagues up on what you've learned.

Phase 3: Showtime

Invite the most promising vendors back to demo their products to a few of your coworkers. This time around, you're aiming to assess how good a fit they might be with you. How many of your desired outcomes could these vendors reasonably help you achieve?

Ask yourself the following:

- *Have I included a variety of perspectives?* This group might include student services, curriculum and instruction, instructional technology, IT, data and evaluation, leadership, and others. (If possible, bring back the stakeholders you included in your needs assessment.) With a multidisciplinary team, you'll assess vendors more accurately. What's more, your coworkers will appreciate being included in the decision-making process and will be more likely to care about the project's success as a result.
- *Are users such as teachers or principals available to attend?* Similarly, including users (who are often school site staff) will give you the double benefit of feedback straight from those for whom it matters most and an early start on the buy-in-building process.
- *Who needs what level of granularity?* It's OK to split up meetings, especially if some stakeholders need details and others want to stay high level. Make it a quick demo for your superintendent, for example, but schedule more time with data analysts who'd want to get into the nitty-gritty details.

- *What should the vendor(s) be prepared to share?* Recommending a few talking points might feel like "tipping your hand," but a vendor does need to come prepared to make the most of your colleagues' time. Don't be afraid to ask your colleagues to come with tough questions. The combination of a well-prepared vendor and a critically engaged audience will mean a productive demonstration.
- *Which way are my stakeholders leaning?* Debrief with your team afterward: What did they like? What did they not like? These are good questions to start with, but sometimes you'll get vague answers. Probe for more precision with questions such as the following: If you had to rank the options, how would you rank them and why? If it were this product or the status quo, which would you prefer? What would you need to see to give this the green light?

Ask the vendor the following:

- *Are you able to tailor the demo to the audience? Can you populate the platform with our district's data?* The better your audience can imagine a platform as "theirs," the better they can tell whether they'd like it.
- *Do you need an update?* If you get delayed anywhere in this process, be proactive with your salespeople. They're likely juggling a number of potential sales; with open communication, they'll be able to keep your name on the implementation resources you'll need if and when you do partner.

Phase 4: Nuts and Bolts

By now, you probably have a few favorites, but the devil is in the details. Spend some time scrutinizing both the technical limits and implementation requirements to ensure you know what you might be getting yourself into. If you already know who you prefer, this phase will likely overlap with Phase 5.

Ask the vendor the following:

- *What does a successful implementation process look like?* Ask for a call with your salesperson and whoever would manage your relationship after you sign on. Ask the following to ensure everyone is on the same page about what it takes to reach success:
  - *How long does implementation typically take for a district like mine?*
  - *What work is required of our team? How much time does that take?*
  - *What skills, information, or access do those individuals need?*
  - *When this process does not go according to plan, what is most often the cause?*
  - *What type of training do you provide?*
  - *How often are you available to check in about our implementation and rollout process?*
- *How do you make sure the application is available and performing well? Do you have tools to monitor performance and processes to apply updates?* You've already explored the features you want, but it's important to probe how well they work and how they're iterated upon.
- *How often does data refresh? Does it do so automatically?* Depending on what kind of system you're looking at and what information it would store, you may want it flowing in or out on a particular timeline. Avoid stale data and file-exporting headaches by asking for the details of data syncs.
- *What is your average resolution time for support tickets?* Nobody's perfect, so ask about what happens when something's off. It'll count when you get a prompt, helpful email from a real human.
- *How do you manage data security and privacy?* Does the vendor have a security incident response plan? What measures are in place to protect personally identifiable information? It's important to verify that the vendor would protect your student data vigilantly and respond responsibly in the event of an incident.
- *Will other districts vouch for you?* Ask for references. If you're really motivated, you could even go visit a fellow school district to see the tool in action.

Phase 5: Sealing the Deal

Congratulations! You've found your match! There's a little more to it than simply signing on the dotted line, so start having these conversations early (ideally during Phase 4) so nothing gets hung up right before you cross the finish line.

Ask yourself the following:

- *Who needs to approve this purchase?* The answer to this question should be easy because you already covered it in Phase 1. However, it may be helpful to explain your implementation timeline to the powers that be, who might not understand why it's important to get started sooner rather than later.
- *Do I need approval from our legal department?* If so, ask for the Terms of Service and a draft of the contract and send them over to your legal team. Legal review is a frequent curveball that can delay the selection process, especially for larger districts, so get this out of the way as soon as you can.
- *Who's the appropriate person in your purchasing/accounting department to be working with? What does he/she need from the vendor to get payment out on time?* Even if you haven't gotten final sign-off yet, your purchasing/accounting contact might appreciate a little notice that this expense is coming up.

Ask the vendor the following:

- *What will you need for a smooth implementation?* Some districts can get so focused on signing the contract that they forget that set-up is right around the corner. Get a step ahead and start gathering credentials, files, contact information, etc.
- *When will you need to check in next?* Look up your subscription expiration date, then mark dates six and three months out from the expiration date for a check-in with the vendor. If they don't already do regular check-ins, these will be crucial for a conversation about your experience thus far. It'll offer an opportunity for you to advocate for what isn't working well—if you can fix it, you'll save yourself having to go through the shopping experience again. At the very least, it'll prompt you to evaluate your progress toward the goals you laid out during your needs assessment process.

Creative Funding Solutions

Pilots: This option allows you to try a product out by paying for a short amount of time on a prorated basis. If you like it, you're ready to sign a full contract and you've already made it through implementation! If you don't, you've minimized your losses. This option is popular with districts shopping on an off-season schedule (i.e., not during the spring) because it allows ample room for an early start on implementation and usually puts districts on a spring purchasing schedule in subsequent years.

Multiyear contracts: Some companies will give you a discount for signing a multiyear agreement. Most successful technology rollouts take longer than a single year to gain momentum anyway, so there's little to lose here. What's more, it allows you to lock in pricing with a vendor, preventing pricing changes you may not have budgeted for in future years.

Splitting the bill: Your team might be out of extra funds for the year, but there may be other pools in other departments. Touch base with IT, curriculum and instruction, or whoever runs professional development funding. If there's mutual interest, you may be able to split the invoice and make a joint purchase.

Hunt for funding: In some cases, grants are available to fund innovative projects in school districts. For example, forty-six school districts were awarded funding last school year to track their progress against multiple measures of success as part of the Mosaic District Progress Monitoring program. (Please email grants@schoolzilla.com to stay abreast of future funding rounds.) If your district employs a professional grant writer, he/she may also be a good source of ideas.

Build it in for next year: Obviously, a postponed timeline isn't ideal, but collecting ballpark pricing and building it into your budget for next year means you can pick up where you left off.