BUYING TECHNOLOGY YOUR DISTRICT WILL ACTUALLY USE

Before embarking on a time-consuming procurement process, completing a solid needs assessment will help you keep the vendor selection process focused on your district and your students—not shiny bells and whistles! The savviest districts also leverage this process as a way to get people to buy in: your implementation and rollout of a new technology will be smoother if all key parties feel that their everyday work, expertise, accomplishments, challenges, and wishes are honored and taken into account from the very beginning. Lastly, a well-done needs assessment will surface the most important needs, priming stakeholders for alignment on what's essential and flexibility on the rest.

For the purposes of this guide, we'll assume that someone in your district is motivated to shop for a new technology system for the district.

Part I: Stakeholders

The future of a newly purchased tool is brighter when stakeholders are engaged before the purchase decision is made. Typically, the people involved in a new technology initiative can be divided into three broad categories:

▶ *Proponents*: People who drive the initial interest in a new tool. Sometimes this is someone close to the work who is inspired to do more with a new product. Other times, a leader such as the superintendent might decide it's a priority.

▶ *Users*: People who would ultimately use the tool and, if the project is successful, would directly benefit from it. In many cases, these people are school site staff.

▶ *Implementers*: People who will not use the tool but must be involved for the project to be successful. These might be people with technical skills such as IT staff or an SIS administrator, but it can also include someone involved in training and encouraging staff to use the tool.

Take a few minutes to consider your stakeholders. Which people fall into each category? Now consider who might be available to talk with you about the district's needs. (You might think of the same individual for multiple categories—that's fine!)

Part II: Needs Assessment

Once you've considered your stakeholders, it's time for a listening tour. We've listed some questions you might want to ask. Some of them will help you understand what exactly stakeholders want from a new solution, whereas others will put their potential cost into perspective. We've built in some questions about an alternative to purchasing. They will help you set a bar against which to evaluate potential vendors in the future. We've grayed out boxes where the questions do not apply to the given role.

Stakeholder	Proponent(s)	User(s)	Implementer(s)
Who are they? (e.g., guidance counselors, IT staff)			
Who did you speak to? (e.g., Kevin, Susana)			
Understanding desired outcomes Start with what's most important: how a tool will help your team serve students. If the answers to these questions are hazy, consider postponing the selection process until there's a strong case for student and family benefits.			
How would this support student outcomes?			
How would this support the district's strategic goals?			
Understanding desired adoption Once you have clear answers to the questions above, it's time to drill down into how goals might be achieved with a new product. The more specific you can be, the better. They'll guide you through the rest of the process.			
Where did you get the idea to use this product?			
What is your current process?			
What about your current process would you want to keep?			
What about your current process would you want to change?			
How would you be able to apply this tool to your work? What actions might you be able to take as a result of having used this tool?			
How frequently would you want to use this tool?			
In what settings might you be able to apply this tool?			
By when should you be able to apply this tool to your work?			
Understanding trade-offs of a new tool There is no silver bullet when it comes to technology. Ask questions that get at the trade-offs of adopting a new product so you have a well-rounded understanding of the pros and cons.			
Do we have the expertise and capacity necessary to undertake an initiative like this?			
If so, how much time would it take us to implement and support this tool (and, if necessary, sunset a current process)?			
If so, how would supporting this initiative affect the rest of your work? What would you need to delay, scale down, or eliminate from your plans?			
If not, is training necessary? How much time and money would it cost?			
If not, would we need to hire or contract someone to support it? How much would it cost?			
Understanding trade-offs of the alternative This is crucial but often overlooked. Consider what your district would do if you didn't purchase this product. Would you chart your own path and build something from scratch? Would you stick with your current system? The costs of this plan (both in dollars and student outcomes) are the bar against which you'll be measuring potential vendors.			

Stakeholder	Proponent(s)	User(s)	Implementer(s)
If you'd build a DIY solution			
Do we have the expertise and capacity necessary to undertake an initiative like this?			
Would you need to hire for this?			
What other services (e.g., consulting, hosting) would you need?			
How would supporting this initiative affect the rest of your work? What would you need to delay, scale down, or eliminate from your plans?			
How much money would the staff time and/or contracted services cost?			
How much ongoing maintenance would be required each year? What would that cost in staff hours and/or spending?			
If you wanted to modify the system later, what would that cost in staff hours and spending?			
If you'd stick with the status quo			
Does this system succeed in supporting the student outcomes you listed above?			
Does this system succeed in supporting the district-wide strategic goals you listed above?			
Are you able to change anything about this system to achieve those goals?			
How much would that modification cost?			
How much capacity does it take to support that modification?			
Are there other costs associated with supporting that modification (e.g., training, consulting, hosting)?			
If you wanted to modify this system again later, what would that cost in staff hours and spending?			

Understanding current stakeholder preferences
While the questions above will ultimately help you choose the best option to meet your district's needs, it might still take some convincing to get everyone on board. Determine who's rooting for what early on so you know how to work with them in the process to come.

How are you currently feeling about the idea of a new tool?			

Part III: Rubric

Recap your finding for everyone involved by creating a rubric. Beyond creating a handy feedback-gathering tool for the shopping process, articulating findings from the group will also help pave the way for alignment and compromise.

Here's how you might create one:

1. List common themes you encountered during your needs assessment in each column (e.g., easy to use, interoperability).
2. Elaborate with criteria for meeting them (e.g., offers single sign-on capabilities, can be used without an explanatory manual)
3. Rank each theme and criteria by importance, ranging from showstopping must-haves all the way through unnecessary bonuses. The number of stakeholders who care about your themes should drive this ranking, but don't forget about practical deal breakers that might outrank popularity.
4. List the themes in order of importance. If you want to be systematic about this, assign a multiplier that expresses the difference. As you consider vendors, score them against each theme and then multiply their points by each corresponding multiplier. The resulting point values should help you understand how strong each vendor is in the areas you care about most.
5. Include the alternative (status quo or DIY solution) you discussed in your needs assessment in the first row. This is the bar against which you'll be measuring potential vendors.
6. Finally, share this rubric with your stakeholders to close the loop on your conversations and signal the start of the shopping process!

And here's a simple example of what it might look like:

	Easy to Use Can be used without an explanatory manual		Interoperability Data syncs automatically, able to integrate with our SIS		Excellent Customer Service Responsive support team		Total Points
Options	**Points**	**Multiplier**	**Points**	**Multiplier**	**Points**	**Multiplier**	
Alternative	4	5	3	10	6	3	68
Vendor #1	8		2		5		75
Vendor #2	5		5		7		96
Vendor #3	6		6		10		105

Once your needs assessment is complete, you're ready to roll up your sleeves and search for a tool that fits the bill. Stay tuned for our upcoming guide to a smooth and successful shopping process!