AN OPTIMAL REFERENCE GUIDE

The Strategic Approach to an Education Administrative Technology Procurement

Extraordinary insight into today's education information topics

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Executive Summary

Learning organizations, including local & state education agencies (districts, schools, and charter-managed organizations) are under significant pressure to deliver and maintain highly functioning education administrative technology systems; student information systems (SIS), instructional improvement systems (IIS), learning management systems (LMS), financial/HR systems, and a variety of other systems. These systems play a crucial role in organizing and structuring education data, acting as the authoritative sources for accurate records of student and educator data. They also serve as the vehicle for a learning organization and its community to access, view, and utilize their data.

While very few school districts are first-time buyers of SISs today, often they are in the market to replace an existing SIS that has not scaled to meet growing district needs. In addition, newer systems such as IISs, focused on utilizing education data to drive curriculum and differentiated instruction for all students, have arrived on the scene. As data collection and reporting have grown to meet the needs of local, state, and federal requirements, the uses of data are changing, and the standard administrative technology systems are not a "one size fits all" solution. Systems that are scalable and easy to customize are often a better fit for a district or a school than an out-of-the-box, less scalable solution. In addition, one SIS might be a better fit in one school district than another district.

How do you find the best match of an administrative computing system for your organization? Decision makers should consider:

- Clearly defined business processes;

- A thorough list of organizational requirements from all user perspectives;

- Scalability of a system to grow and adapt to new requirements, additional staff and students, and integration of new applications;

- A data governance process to clearly define all roles and responsibilities related to capturing and storing data; and

Education organizations should lay out and follow a structured process for the procurement of administrative technology systems that includes broad user-driven requirements and a comprehensive strategy for analyzing systems to find the best match.

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- Cost of ownership over 5 & 10 years,
  including maintenance contracts,
  human capital, updates and upgrades.

About This White Paper

This white paper presents an overview of the important issues in procuring education administrative technology systems from the learning organization's perspective, outlines a methodology from stakeholder buy-in during the requirements-gathering phase to the eventual selection of a solution, and makes the case for the strategic advantages offered by following a highly structured procurement process.

Project Governance

The success of the procurement process of an administrative technology system is largely dependent upon the structure put in place to govern the process through its entirety. Building an organizational chart of all stakeholders related to the learning organization, including their roles, as well as assembling a project team that represents a strong cross-section of users of the new administrative technology system is crucial to the project's success.

ORGANIZATIONAL STRUCTURE

Developing an organizational chart to represent the sponsors, key stakeholders, project leaders, project teams, and personnel responsible for each phase and deliverable, provides important structure to the procurement process. By spelling out roles and responsibilities, your organization provides clarity around who is involved in the project and what will specifically be accomplished.

PROJECT TEAM

The project team for procuring an administrative technology system should consist of 12-14 members representing a diverse cross-section of staff members and stakeholders from your learning organization. For example, a school district might include administrators from the district or school level, department heads, teachers, data clerks, secretaries, representatives from health, student services, high school guidance, or food service. The key is to create a team of high-level users of the new system who will clearly represent the needs of the organization and also help build momentum by providing stakeholder buy-in.

A typical organizational chart offers a good indication of who in the organization is responsible for all operational activity; however, it will not likely address who is responsible for a defined project. Therefore, the role of project governance is to provide the framework to govern the project from start to finish.

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Needs Analysis and RFP Development

NEEDS ANALYSIS

A comprehensive needs analysis is the crucial first step to procuring a new administrative technology system. Gaining an understanding of your organizational needs through the examination of your current use cases, practices, and shortfalls in the existing system or in your process will begin to provide a picture of areas needing to be addressed.

During this phase, stakeholder interviews, focus groups of users, and site visits to learning organization campuses will provide important data to begin to compile requirements for a new system and will also begin to build trust and buy-in from users as they become actively involved in the process.

A final component of the Needs Analysis phase is to complete a thorough document review. Fold in the learning organization's vision, mission, strategic plan, and include research around best practices for administrative technology systems, use and applications, in districts and schools around the United States to complete the picture.

RFP DEVELOPMENT

A Request for Proposal (RFP) is the document that will serve as the authoritative source of requirements and related information to outlining your organizational needs. This is the document to which vendors of administrative technology systems respond. The development and publishing of this document must be orchestrated in a way that captures and articulates the input from all of your stakeholders and presses vendors to answer each and every one of your questions, clearly and methodically.

The most important documentation in your RFP are your requirements. Strong requirements for administrative technology systems, typically as many as 1,500-2,000 total, leave little doubt and gray area as to what your organization is looking. Requirements are unique, yet also rooted in best practices for any administrative technology system, and often grouped into categories in the RFP. Typically, requirements are also reflective of your organization's greatest needs. For example, if high school transcripts have been historically problematic in determining value for grading, assigning proper credit, or mechanically lining up on the document and printing correctly, the requirements will spell each of these items out and ask for a detailed individual response.

Vendor Selection Process

VENDOR EVALUATIONS

Once your RFP responses been completed and submitted by prospective Administrative Technology Systems vendors, the work begins to evaluate the proposals based on how they (the vendors) responded to your questions and requirements.

Prior to the acceptance of the responses, your organization should create a weighted scoring analysis methodology where additional emphasis is placed on the items of most importance to you. All published requirements count, however, some have greater value and importance than others in terms of priority or addressing a structural need. Your analysis should enforce those prioritized items and allow for greater emphasis to be placed on them.

The evaluation of responses culminates with the selection of finalists. Each finalist has potentially responded to the RFP demonstrating a variety of strengths, but most importantly, has best matched your unique, specific requirements.

VENDOR DEMONSTRATIONS

The final step for vendors in the selection process, is to visit your learning organization and present a demonstration of their solution. This allows your team to compare the finalists with each other, as well as to observe all the ways their solution will meet your needs, or not. To ensure that this process allows you the opportunity to compare each administrative technology system with another, your organization should create and insist on the use of a script for the vendors to follow.

A vendor demonstration script is a document, built on your requirements, providing a guide for each vendor to follow when they come to present their solution. The script allows your evaluation team to score each vendor presentation in the same manner, following the same criteria, based on how well they addressed your requirements. The script also gives your evaluation team an opportunity to dig deeper with follow-up questions when further clarification is needed. Finally, the vendor demonstration script forces the administrative technology systems vendors to demonstrate what you want to see, items related to your specific needs, rather than just the items they want to show you.

FINAL RECOMMENDATION

At the conclusion of the vendor demonstrations, your organization has a great deal of information to review in selecting a final solution. Two final steps to complete the process are to check references and conduct site visits of learning organizations utilizing the proposed solution. Both activities offer tremendous insight into the practical experiences of users. You may learn about their implementation plan, training, similar user cases, scheduling, pitfalls to avoid, successes to build upon, and a variety of other important primary source information.

Final recommendation materials include all of these.

- Detailed information from your Needs Analysis

- A set of functional requirements

- Request for Proposal responses

- Weighted analysis of responses

- Scored vendor demonstrations

- Vendor reference checks

- Summaries of site visits to current solution users

Administrative Technology Systems Implementation

Once your learning organization adopts a new administrative technology system, the real work begins to implement the solution. The implementation should be treated as a separate project from the procurement process; however, the information gathered during the procurement phase is highly valuable, particularly in identifying key stakeholders and users, their needs in modules and levels of training, and to be certain the vendor is delivering exactly the solution that matches the requirements identified in the RFP and demonstration process.

Follow these high-level steps to successfully implement an administrative technology system.

1. Form an implementation team.
2. Create/develop a project plan for implementation in collaboration with the learning organization and the vendor.
3. Establish a data governance process.
4. Develop a data conversion plan.
5. Implement a communications plan.
6. Develop a training plan along with levels of attainment for each category of user in the organization.
7. Maintain and manage:
    a. Weekly project management meetings,
    b. The project plan and scope of work,
    c. Project implementation status reporting, and
    d. Action/issue resolution matrix.
8. Report/present updates to organization leaders and boards as determined by the team.
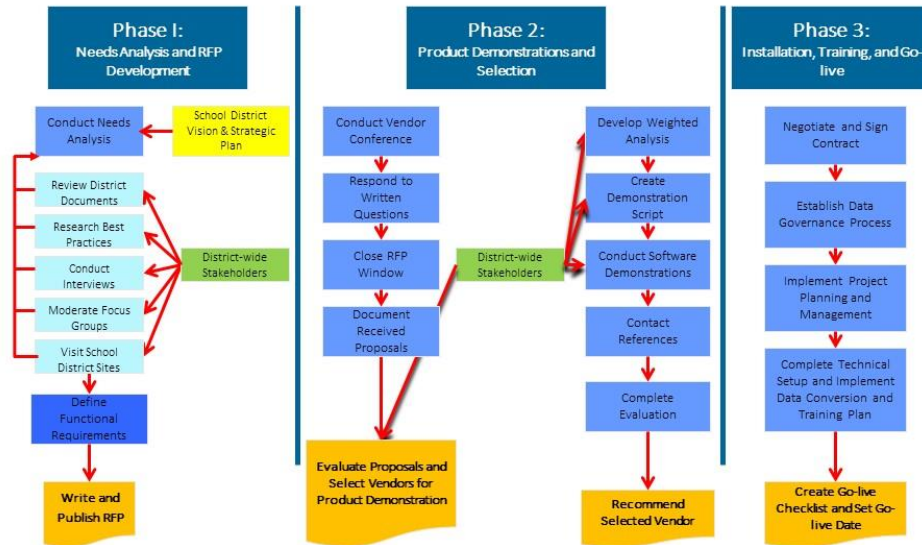
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Summary

Procuring and implementing a new administrative technology solution in an education environment presents a series of unique challenges. Growing demands on system functions by larger user communities, enhanced and sophisticated access needs to data, and an ever expanding set of requirements for use by all members of a learning organization have caused an increase in instances of administrative technology system replacements. Simply stated, organizations are outgrowing their current systems, or new operational needs are emerging and a new set of technology solutions are necessary to address those new needs.

Adhering to your organization's procurement rules and regulations addresses the mechanical function of purchasing a new administrative technology system; however, there is a tremendous amount of requirements needed to satisfy all users and business processes of a learning organization. Additionally, if not selected methodically, systems can become obsolete, outdated, or less useful. Given the expense in dollars as well as investment of human capital in purchasing and implementing newer administrative technology systems, learning organizations can only afford to get it right the first time. The only way to ensure that occurs is to follow a highly structured process led by knowledgeable administrative technology system procurement specialists.

Procurement Process Flow

About ESP Solutions Group

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Extraordinary Insight™ into P20W education data systems and psychometrics. Our team is comprised of industry experts who pioneered the concept of "data-driven decision making" and now help optimize the management of our clients' state and local education agencies' information systems.

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