



EDTECH PROCUREMENT IN HOUSTON INDEPENDENT SCHOOL DISTRICT

The Shift to Blended Learning

We are in the midst of a national shift to blended learning—an educational model that combines teacher-led instruction in the classroom with online, mastery-based education that enables personalized learning for each student and increased effectiveness for teachers. The growing availability of high-speed Internet connectivity, affordable devices and high-quality digital content means student-centric, personalized learning is finally achievable for schools and districts at scale. The effective use of technology is a key to blended learning, and technology has thus become increasingly common in schools throughout the country.



Why Does EdTech Procurement Matter?

In what U.S. Secretary of Education Arne Duncan has called a “new normal” economy that prizes efficient and effective educational spending, getting the technology procurement process right is essential. Success at this stage of educational innovation—where teaching, learning and technology meet—can be measured by the efficient, transparent and impactful use of funds toward hardware and software purchases that deliver on the promise of blended learning.

Technology is a tool for teaching and learning, and purchasing technology without thoughtful consideration of instructional goals can lead to inefficient and ineffective spending. District leaders should begin by identifying teaching and learning goals and then return to those goals to inform purchasing decisions. EdTech procurement is an important reflection of a district’s overall vision for learning, and procurement decisions affect the long-term potential to realize learning goals.

TLA BLENDED LEARNING SNAPSHOT

The Learning Accelerator (TLA) is a nonprofit whose mission is to accelerate the implementation of high-quality blended learning in districts across America. The **TLA Blended Learning Snapshot Series** captures specific examples of success in key areas, such as education technology (EdTech) procurement, human capital, and others. These snapshots present a series of implementation efforts that can inform and inspire other districts in the move to blended learning.

Houston's EdTech Procurement Story

This snapshot highlights Houston Independent School District's (HISD) success with purchasing EdTech and is a valuable real-world example of how to follow the recommendations found in the *Smart Series Guide to EdTech Procurement*. HISD is the largest district in Texas and the seventh largest in the country, and the success of their strategy demonstrates that it doesn't take ideal conditions or special circumstances to innovate. HISD's leaders learned from others, took their time, supported teachers and students in the transition and effectively managed the initiative. With strong leadership and a solid plan built on a common sense approach, even turning a ship the size of Houston toward blended learning was possible.

The information in this snapshot was built upon a series of interviews with key leaders and stakeholders throughout HISD in order to capture the procurement and implementation processes in action. Interviewees included a full spectrum of staff, ranging from Houston's Chief Information Technology Officer to principals at the pilot schools. HISD also provided sample EdTech purchasing tools for other districts who are embarking on this journey.

Through the [PowerUp initiative](#), HISD leveraged the necessary resources to launch a long-term program to get technology in the hands of 200,000+ students. PowerUp was designed initially for the district's 65,000 high school students, with laptops delivered to the first 11 pilot schools in January 2014 and plans to expand into 18 more high schools in the fall of 2014. Following a six-month research and collaborative period initiated by HISD Superintendent Terry Grier,

the initial goal to use technology to transform the nature of learning and instruction is now on the verge of widespread adoption. HISD's approach combined thoughtful goal setting, thorough planning and robust support. Their process demonstrates the importance of starting with learning goals and keeping them at the center of key implementation decisions around procurement.

Create the Conditions for Success: Set Common Goals, Fund The Shift And Secure Support

HISD leaders stress that creating the conditions for long-term success before moving into key implementation decisions is critically important.

- **Set common goals:** Superintendent Grier's vision for "anytime-anywhere learning" for all HISD students drove, and continues to drive, procurement and implementation efforts.
- **Fund the shift:** HISD chose to use grant funds, existing operating dollars and funds re-allocated from elsewhere in the district to fund the digital shift for every high school student through the district's general budget. Funds were also repurposed to sustain PowerUp through textbook, Title I and professional development dollars.
- **Secure stakeholder support:** Stakeholder involvement was a consistent priority that engaged a diverse cadre of active participants. HISD purposefully brought together several central office departments—finance, purchasing, information technology (IT) and newly minted technology positions—to establish a common vision and build alignment. Chief Information Technology Officer Lenny Schad managed a project team assembled from these departments and coordinated with other leadership as necessary.



Houston Independent School District

is located in Houston, Texas, population 2.16 million. With 211,552 P-12 students, HISD is the largest school district in Texas and the seventh largest in the country.



In an effort to guide districts in making smart choices, [The Smart Series Guide to EdTech Procurement](#) offers practical advice to inform key EdTech purchasing decisions. A key tenet of the organizations that partnered to create the guide is the idea that EdTech purchases should be closely aligned to educational goals. HISD's success in this key area is one of the many reasons why their story is featured in this snapshot.

“With anytime-anywhere learning, our students will have the world at their fingertips.”

*Superintendent Terry Grier
(February 1, 2013—HISD State of the Schools Address)*

Plan: Moving from Vision to Action

Interviews following HISD's successful EdTech procurement process revealed that the following action steps enabled the complicated initiative to succeed:

Establish Need

HISD first determined gaps and needs. HISD evaluated what the schools already had in terms of infrastructure, support and hardware as a key component of the process before the 11 schools ever saw devices.

Learn from Pioneers

The IT team conducted extensive research of other districts and schools using technology to narrow down the results of what HISD wanted to implement in their district. This involved traveling to Mooresville Graded School District ([MGSD](#)) in North Carolina, a celebrated district that has received national attention for its digital conversion efforts, to discuss the successes and failures of technology procurement with those schools' leaders.

Conduct Research

HISD also conducted a comprehensive scan of available digital curriculum and Web 2.0 tools that would meet their instructional needs. HISD called the vendors and asked for demonstrations. Members of the curriculum department (by discipline) and IT navigated the products, used the tools to sample the experience, and tracked their reviews in a shareable format.

- The Instructional Technology (IT) members reviewed programs for navigation, interoperability, user friendliness and instructional potential.

- Questions asked included: Will it foster student-centered instruction methods? Will it support discovery learning? Does it offer the ability to search for content based on several criteria such as standards and learner preferences? Are there any added features for differentiated instruction?
- The curriculum team first validated the content for quality and alignment with at least 80 percent of Texas standards (TEKS) for Science and Math, English Language and Social Sciences in order to ensure minimum digital content to address the core courses.
- They then assessed the ability to access other [digital content](#) via Library Services (netTrekker, Discovery Ed, nBc Learn).



Explore Options

As HISD's 1:1 plan (one student: one device) came into action, the question of leasing versus buying was the first major decision. HISD chose leasing due to the lower initial cost and ability to do



a slower rollout. [See [Texas Lease vs. Buy Guidelines](#) and [HISD Cost Calculation](#)]

Issue the RFP

HISD built an RFP from an existing template, and updates were made to cover the district's non-negotiable specifications. The RFP was released and responses came in from most major manufactures. [See [HISD Device RFP](#)]



Evaluate Bids

In order to achieve a true cost comparison, a lengthy iterative process (two to three cycles) took place between the vendors and HISD. Houston received multiple bids offering different products, specifications, and services at different costs. They used these bids to refine their actual need and, by requesting the same thing from all vendors, were able to get true price comparisons.

- Houston advises that leaders define their specific needs then encourage vendors to make "apples to apples" comparisons by drafting bids that can be compared side by side.
- Critically important to the success of HISD's RFP work was allowing enough time to ensure that decisions were well-informed and that there was open communication with the school board so they could support the time-consuming process.

Engage Stakeholders

The top few vendors were chosen and further vetted to make sure they aligned with HISD's needs and the top proposal was brought before the HISD school board. The school board had been kept "in the loop" through email and meetings during the entire RFP process to ensure that they understood what was happening and would be ready to help make the final decision.

Negotiate

Once the school board gave its approval, the real negotiations began. A legal team from the manufacturer, the leasing agent and HISD sat down to finalize contract negotiations. After lengthy negotiations and final acceptance, the delivery, lease, and warranty timing schedules were put in place. HISD recommends planning for six weeks for hardware delivery.

Select the Best Choice

HISD selected a package that included leased laptops, dedicated on-site support, loss and damage protection, as well as phone and online support.

Prepare and Support Teachers and Leaders

During the RFP process, principals and school leaders of the initial 11 pilots met with district leaders during the summer, a full six months before the devices would ever be delivered to their students. Michael McDonough, principal of the 3,600-student pilot Bellaire High School, described walking away from that meeting feeling overwhelmed but knowing that the district absolutely supported him in the technology implementation.

Keep the Lines of Communication Open

For one year, each pilot school was assigned a dedicated member of the IT team that had a two-way direct communication channel with every principal, including cell phone numbers and regularly scheduled meetings. This formal process for collaboration and alignment points to the importance of setting up systems for ongoing support and collaboration as a key to effective implementation.



CHALLENGES FACED BY HISD:

Establishing lines of communication for the RFP.

The purchasing team acted as the go-between for the vendors but didn't always have the technical expertise to handle the specifications of the RFP's iterative process. Houston leaders advise establishing a point of contact to ensure direct open lines of communication between departments allowing them to work together on nuanced RFP details. Houston also recommends that the interdepartmental communication concerning the RFP is coordinated by the central office, so the vendor responses come across as a unified voice.

Ensuring an "apples to apples" comparison in the RFP.

HISD did months of pre-RFP work to figure out exactly what they wanted, but the RFPs came back differentiated and full of extra accessories for hardware and services. By drawing a clear line regarding devices and keeping the requirements clear, HISD forced vendors to manipulate their prices to reflect exactly what was wanted, thus making a comparison possible.

Allowing sufficient time for the process.

The total time for HISD's procurement process, from the creation of the RFP to final agreement, was approximately four months, but HISD recommends allowing more time to get things done correctly. The decision to lease rather than buy took longer than expected when timing was crucial to maintain school board and administrative support. This, along with the tremendous departmental time and effort to create an "apples to apples" comparison, caused delays. Houston advises that leaders should give themselves more time than they think they will need and continuously share new information with stakeholders to keep things running smoothly.

"You don't want the vendor to be pitching you a product, but a solution. We need them to think of their product as an experience [with technology] that has an impact on human lives and students. We want our vendors to be partners in the business of education."

*Liliana "Beatriz" Arnillas,
Instructional Technology Team Leader*

Implement and Improve: Keys to Successful Technology Integration

After plans were in place for procuring technology that could support instructional goals, the energy in Houston shifted to



[implementation](#) in the classrooms. While the focus of this snapshot is the procurement process, it's worth highlighting HISD's top recommendations for how to introduce technology to transform teaching and learning and how to keep improving.

Engage Stakeholders Early

Principals and staff of the 11 pilots met with district staff six months before device delivery. There was a high level of transparency around the complexity of the project, and support for each school was stressed throughout.

Extensive Teacher Training

The district allowed plenty of time for teachers to get comfortable with the new learning devices. Trainings were scheduled throughout the summer and fall and emphasized patience and flexibility as teachers learned how to use the tools, making sure teachers felt empowered. The initial staff from the pilot schools will act as mentors and train other HISD staff as the program expands.

Leverage Early Leaders

The implementation team visited campuses to identify early adopters and leverage their leadership in the rollout. The teachers worked hand in hand with the IT team to find the right



[technology-friendly teaching resources](#) to complement the existing curriculum.

Support Staff

One IT team member was assigned to each of the pilot schools, and the principals knew those team members were fully dedicated to helping the teachers and staff succeed with PowerUp. Two-way channels of communication, as well as regularly scheduled meetings, ensure schools feel fully supported.

Measure Impact and Improve

In keeping with the student-driven goals for the blended learning transition, HISD leaders hope to see an appreciable difference in student achievement within one to three years as evidenced by benchmark assessments. Computers have been in the classroom for just a few months, and Houston is already looking to the next 18 schools to receive devices in the fall. Leaders from the next phase are visiting the original 11 pilot schools to figure out how to make the process seamless and efficient.

Be Consistent

In HISD's case, allowing individual principals to tweak the rollout did not work. The format must be uniform and consistent in order to keep everyone focused on the same goals. In districts where principals have greater autonomy, consider how collaboration and buy-in during the vision and process stages can keep school leaders focused on the common mission while maintaining control.

Cultural Shifts Take Time

Some schools have already fully embraced blended learning models, while others are more cautious in their approach. Houston recognizes that such a shift will take at least five years, but they remain focused on the initial goal of getting teachers at all readiness levels to start thinking about student-centered learning.

***“This is a way
of transforming
what and how we
teach.”***

*Superintendent Terry Grier
(April 25, 2013 - HISD School
Board Presentation)*

CREATE
CONDITIONS
FOR
SUCCESS

PLAN

IMPLEMENT

IMPROVE

[The Blended Learning Implementation Guide \(BLIG\)](#) walks users through a four-step process for implementation of personalized, blended learning environments.

Recommendations

HISD's example reveals that successful EdTech procurement is possible with common sense planning, stakeholder engagement, open communication, change management and transformational leadership. Other districts can and should be able to emulate the key elements of HISD's plan. Launching a blended learning initiative built on a solid foundation of student learning goals is made possible through EdTech purchases that support them.

The successful EdTech procurement process in HISD suggests the following high-level recommendations:

- 1 **Develop and share the vision across your district to get buy-in. Keep people and processes focused on the end result: expanding learning opportunities for students.**
- 2 **Learn from the experience of districts with successful deployments.**
- 3 **Spend time determining exactly what you want from your technology and make it clear in the RFP. Make sure vendors adapt to your needs (not their wants) and price accordingly.**
- 4 **Allocate sufficient time and be prepared for an iterative process in order to get the best price with the best vendor fit.**
- 5 **Connect the work of every department with efficient communication and create the necessary structures to allow that communication to be easy and frequent.**
- 6 **When working with outside agents such as technology vendors, make sure to have a point of contact that represents a unified inter-departmental voice.**
- 7 **Use a consistent rollout process at schools. Consider a phased rollout where teachers gain early access to devices and training, well before students.**
- 8 **Capture best practices. Continuous improvement starts with collecting information about what works and what doesn't during first waves of implementation to develop future rollouts.**
- 9 **Meet your teachers and students where they are. Find the school leaders and students who are ready for blended learning and be patient for the rest to come on board. HISD estimates five years for a complete cultural overhaul.**

The intent of this TLA Blended Learning Snapshot is to capture best practices from a district that has completed successfully a key step towards adopting blended learning: purchasing EdTech devices. As more schools move toward student-centric technology plans, seeing firsthand how Houston successfully accomplished its EdTech buying goals will help take some of the mystery out of technology procurement for others. Giving educational leaders more tools to be successful will ultimately contribute to the growth of high-quality blended learning.

For More Information:



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