

Selecting an Educational Management System

Checklist for Effective Evaluation and Implementation Planning

Data driven-decision making related to the management of learning requires that information useful in promoting learning be immediately available to all of the stakeholders in the educational process. A good Educational Management System integrates online assessment, instructional planning, and reporting using highly flexible tools. School districts that desire educational stakeholders to have rapid access to data for decision-making can use this checklist for Educational Management System evaluation and implementation planning.

1. Identify Stakeholders & Their Role in the Process

An educational management system will impact, in unique ways, the many different members of the educational community. Making sure the perspectives of administrators, IT staff, curriculum team, teachers, principals, governing board members, parents, and students are included in choosing a system will make it easier to implement the system. This first step includes determining whom you will include in the decision making process, and what roles they will play.

- ? How will input from stakeholders be gathered and taken into consideration?
- ? How will stakeholders become informed of the options available?
- ? Will there be a formal review committee or will administrators seek stakeholder input as needed?



Clarify each stakeholders' assignment regarding the evaluation of systems and make sure all participants understand the path from input and recommendation to the final decision. This is important when the final selection process may involve just a few members of the team who will have the responsibility of weighing various criteria.



Goal setting now will make it easier to prioritize criteria and evaluate appropriate technology. Be specific in choosing your main objectives for implementation. For instance, if measuring progress towards standards is important to the district, a top criterion might be the inclusion of items reflecting the most up-to-date state academic standards by performance objective. This might narrow the field of appropriate products and save time in the evaluation process.

2. Determine District Goals

Framing the priorities of the district is an important next step. Districts might state their goals in terms of both short and long term priorities in order to make decisions now that will provide long term returns to the district. The best systems will provide flexibility as district goals progress.

- ? What are the overall goals of the district in using an Educational Management System? Benchmark testing? Formative testing? Instructional planning?
- ? What are district goals related to data and standardized tests?
- ? What are the district goals for reporting assessment data?
- ? What are the goals for using the system to record grades and produce report cards?
- ? What are the goals related to monitoring curriculum implementation?

3. Develop Criteria

This step involves translating the district goals from Step 2 into a list of educational system requirements.

Topics for consideration:

- Assessment capabilities
- Scoring and Benchmark-setting
- Reporting capabilities
- Accommodation of Electronic Learning Communities
- Flexibility both in system implementation options and adaptability to changes in standards and government reporting requirements.
- Instructional tools
- Security measures
- Data management features
- Technical requirements



School districts are faced with many choices in software for educational management. The diversity of needs among schools, and the range of solutions can challenge the most astute educational leadership.

As a resource, a list of recommended criteria for use in evaluating and selecting technology for educational management is included in the ATI White Paper "The Galileo Educational Management System." For a free copy call 1-877-442-5453.

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Vendors can be helpful by providing timetables for system set-up and training. For instance, ATI's Partnership Model includes free technical assistance for implementation planning. Topics of preliminary planning sessions include using district goals to develop tasks and timelines for addressing:

- *Set-up and Support Protocols*
- *Benchmark Testing Logistics*
- *Curricula Aligned Test Needs*
- *Data Importation*
- *Test Administration – Online/Offline*
- *Customization (such as forms and standard sets)*
- *Training*

4. Establish Timelines & Determine Selection Process

Target implementation dates will impact your evaluation process. Working backwards from your district's desired implementation date, plan a realistic timeline for the comparison and selection process. Communicating this timeline to district staff involved in the process (such as purchasing departments) and to outside vendors under consideration will allow you to identify and solve any potential delays ahead of time.

- ? Will the selection process require an RFP? How long will it take to move the RFP through district channels? How much time do you need to review RFP responses?
- ? If an RFP is not required, what selection process will be used? How much time is needed for the decision-making process?
- ? When are members of the selection team available?
- ? How will the Governing Board be included in the process and how will their role impact the timeline?
- ? What post-selection tasks and customization might impact the timeline? (Example: selecting which PO's to include in various benchmark tests.)

5. Compare Technology Solutions

Reviewing alternative solutions to meet district criteria developed in Step 3 is really a series of steps. The length of this stage in the process will be dictated by your timeline above, so steps may occur quickly and/or simultaneously to stay on track. Use each step as an opportunity to further narrow your list and move closer to implementation.

Gathering Product Information and Materials

Request information on systems to review from background research and referrals.

Discussions with Vendors

Interview vendors and ask for an online walk-through. This will allow you to preview systems and create a short list for presentations at your district.

On-Site Presentations

Vendors should be ready to provide a demonstration that meets your needs. Make sure you have decision-makers present to evaluate the software firsthand.

Passwords and Practice Time

Request access to the software and assign qualified staff to "try-out" the system. Since the trial is pre-training, encourage the "tester(s)" to work directly with the vendor and ask plenty of questions.

Written Proposals and Cost Estimates

Whether you require a cost proposal or issue an RFP this step is an important final cut. Make it a point to review proposals carefully against your criteria. This is a good time to ask additional questions of the vendor and schedule a demonstration of the top systems if you haven't already had one.

References from other Districts

Talk to other schools that use the software you're considering.

6. Move from Decision to Planning for Implementation

Meet with the vendor to create a custom Implementation Plan. Components of this plan can come from the work you've invested above in determining district goals and establishing target timelines. Open communication with the selected vendor from the beginning will enable a smooth implementation.



Start discussing training schedules as soon as possible to make sure district requested dates can be accommodated. Identify challenges to implementation with the vendor and resources to minimize those challenges.