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K–12 School Software Buyer's Guide

A step-by-step approach to evaluating software for your school

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Modern school software solutions should bridge communication gaps, provide real-time analytics, reduce the time and effort required to complete tasks, and empower the entire school community.

K–12 School Software Buyer's Guide

This guide is designed to help K–12 private school leaders match their institution's unique needs with the right software solutions for their schools.

Fully integrated cloud-based education and financial management solutions can connect your whole school by powering efficiency, alleviating mundane tasks, and creating an exceptional user experience for your students, families, teachers, and staff.

Take this step-by-step approach to gather key stakeholders, identify potential vendors, prepare for discovery, and make an informed decision when selecting K–12 software solutions.
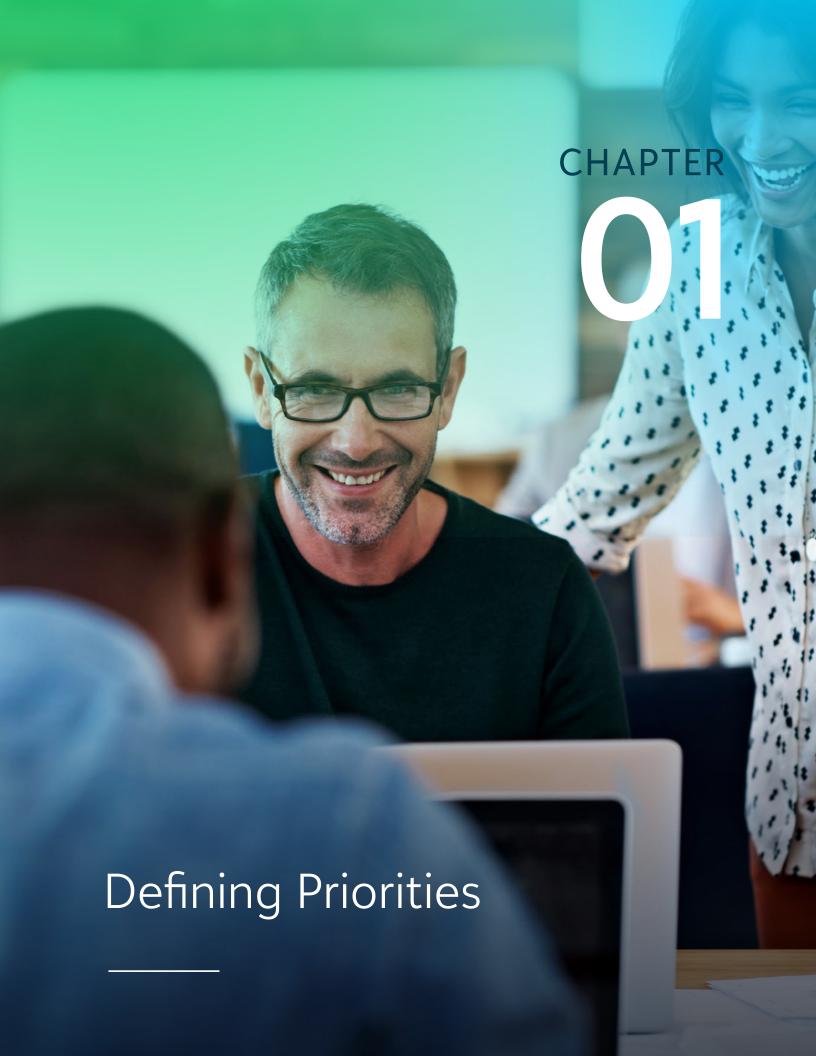
Contents

Defining Priorities

Defining your priorities lets you clearly state what you need from a solution and how you want to leverage it for future growth.

Your requirements should reflect a holistic view of your school to prevent unintended consequences and obtain buy-in from all impacted teams.

WHAT TO LOOK FOR IN K–12 EDUCATION SOFTWARE

It's built for your purposes.
Select a solution designed specifically for K–12 school needs and workflows. Software not designed to address schools' unique challenges may create more issues than they solve.

It connects your entire school.
Your faculty and staff need a 360-degree view of your students to engage them effectively and deliver the best experience possible.

It meets student and family expectations.
Today's families are always online. They're accustomed to information and communication tools at their fingertips and on their smartphones. Your software should provide the modern digital experience they expect.

It adapts to all devices and browsers.
Will you only use the software on office computers? Or do you prefer an intelligent cloud solution that's accessible wherever and whenever your students, faculty, and staff may need it?

It meets your needs and your budget.
Make a list of features that are must-have, nice-to-have, not needed, or not needed at this time. This will help you prioritize what capabilities are critical to your school's operations.

It plays well with others.
Private K–12 schools use enrollment, student information, learning management, tuition, financial aid, accounting, fundraising, and other software systems. Select solutions that integrate as fully as possible.

It prioritizes data security.
Ask these questions about the software you're considering: Where is the data stored? How is it shared? Can it provide role-based access?

It can move data seamlessly.

Make sure your software has the ability to share data seamlessly with your other systems and makes it easy to import and export student information. Does it have secure APIs (Application Programming Interfaces) to extend its capabilities and connect with other critical solutions?

You're prepped for success.

Your software vendor should include excellent in-person, online, and written training with K–12 software experts to help your team quickly hit the ground running.

You get 24/7 tech support.

Look for a vendor that offers a variety of support and success resources, like a robust knowledge base, tips and tricks webinars, in-product chat support, a support portal, and a peer community to share ideas and solutions. Your package should include round-the-clock support for a flat monthly or yearly fee.

You're confident in the tools.

Request in-depth demos that include a preview of all your software requirements in action.

You'll see the return on investment.

Choose a partner with proven outcomes. Ask for references and research the vendor's history working with K–12 schools.

The most important thing to consider at this point is how new software systems will help your faculty and staff with their day-to-day operations.

Gathering Requirements

The time you take to engage thoughtfully in the requirement-gathering process can be the difference between choosing a software solution that moves your school forward and one that holds you back.

This may be the most important step in the software partner selection process!

TIPS ON HOW TO GATHER INPUT FROM STAKEHOLDERS

Stakeholders are those who will use the software, including teachers, staff, administrators, alumni, students, and their families, and those who will support it, like your IT team.

- Include decision-makers
- Define current processes
- Identify gaps
- Understand your stakeholders' ideal world
- Gauge your stakeholders' technical capabilities
- Prioritize your stakeholders' wish lists
- Monetize or enumerate wherever possible
- Tie back to your school's goals
- Examine how the software will fit within your existing tech ecosystem

Stakeholder Considerations:

Nominate a representative from every audience that will interact with the software. Include representation from external groups by identifying students and alumni to help test the system and provide input. Once you've chosen your software partner, this group could also form your implementation committee.

Related Resource: Beyond Checklists: The Human Component of Choosing K–12 Software Solutions

MAKE A LIST OF YOUR REQUIREMENTS.

At a minimum, you should consider these requirements before approaching a software partner:

Functional Requirements

Which functional capabilities do you need from your school software? What will make it easier for teachers to use? What access does each office need? Does the system facilitate communication and put the most important information front and center for students and their families? Ensure the requirements of all stakeholders are represented.

Reporting Capabilities

Which type of reports does your Board want to see? What analytics will be most useful to administrators or the business office? Which out-of-the-box reports do you need? What custom reports do you use now? What reports would you like automated that you currently have to pull manually?

Current and Future Goals

Do you anticipate growth within your school, such as staffing and enrollment? Will there be future access level changes and associated expectations?

Technical Requirements

Consider IT requirements, customizations, upgrades, system maintenance, and other software integrations. Do you want your software to be server-based or in the cloud, accessible out of the office using laptops, tablets, and smartphones?

Training and Support

Every software solution has a learning curve. How much time do you have to train on your new system? Do you prefer in-person training or via online tutorials and video conferencing? Do you want 24/7 support? Which type of support would you prefer (phone, chat, or email)?

Time Frame

What is your time frame from evaluation to implementation? Be realistic.

Budget

What is your organization's software budget? What is your budget for ongoing software support and maintenance?

Think through the answers to each of these questions before you look at individual software packages. Use them to guide your evaluation of the K–12 software systems available.

Related Resource: Essential Qualities of Modern K–12 School Software Solutions

CHAPTER

03

Discovery Preparation

Your approach to evaluating potential software partners should match your needs. Every school's evaluation process will differ depending on:

➤ School size and structure

➤ Workflows and processes

➤ Risk exposure

➤ Level of investment

BASIC VENDOR EVALUATION PROCESS

- Identify potential vendors; conduct extensive industry research, leverage consultants, collect referrals from peer institutions

- Schedule a requirements/discovery discussion before the demo

- Schedule a software demo with key stakeholders

- Follow up to get stakeholder feedback

- Score each vendor using a rating system (see page 14)—weight each category based on your school's priorities (i.e., is budget more important than features?)

- Select a finalist

PREPARING FOR VENDOR DEMOS

Be prepared when asking a potential software partner to provide your school with an in-depth demo. Ensure that you prep both the vendor and your internal stakeholders.

Set expectations ahead of time and make sure the right people are in attendance. Keep reading for tips on getting your stakeholders aligned and prepared for discovery sessions and demos.

Before scheduling discovery calls and solution demos, your stakeholder team must be aligned and prepared.

STAKEHOLDER ALIGNMENT FOCUS AREAS

Outline Current State

- Existing software and hardware
- Operating systems
- Organizational structure
- Program structures

Outline Desired State

- Goals and objectives
- Cloud vs. on-premises
- Proposed project timeline

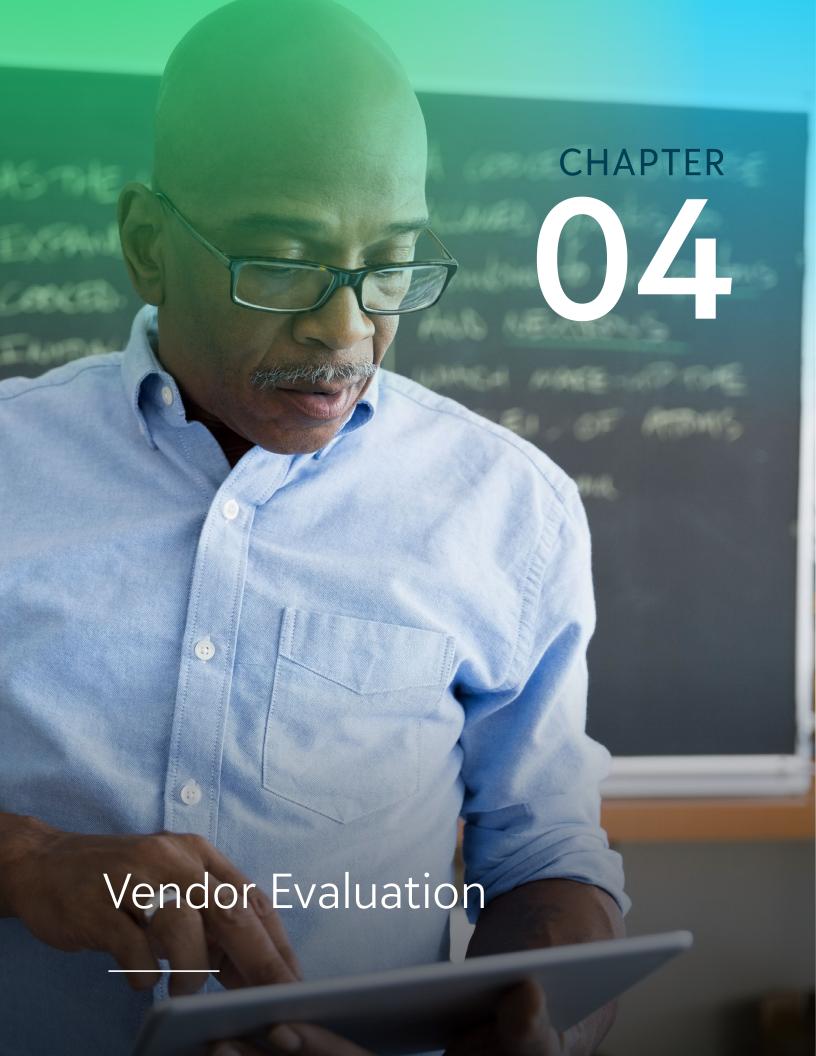**Solution Requirements/Capabilities Ranking**

- Refer to your requirements list (see page 9) and prioritize them from "mission critical" to "nice to have."

DISCOVERY/DEMO PREP CHECKLIST

- Invite and brief appropriate internal stakeholders
- Document stakeholder questions
- Share your goals and requirements list with the vendor ahead of time
- Keep your vendor scorecard handy (see page 12) and ask questions to determine how the vendor stacks up in each category

Vendor Evaluation

WORKSHEET:

Rating Software Solutions

Use this worksheet to evaluate each of the software solutions your school is considering. Rating Scale (1–10): 1=Does Not Meet Our Needs 10=Perfect Match

RATING	SERVICE (Also use this space for any notes)	PROS	CONS
☐	Functional Requirements		
☐	Reporting Capabilities		
☐	Current and Future Goals		
☐	Technical Requirements		
☐	Training and Support		
☐	Time Frame		
☐	Budget		

Vendor Selection

You've done it!

You know what you require and have seen what potential partners can offer you. Now is the time to move forward and select a solution that will make your school more efficient and effective.

BEFORE SIGNING, MAKE SURE YOU HAVE:

✓ Internal stakeholder buy-in

✓ A statement of work from the vendor

✓ A transparent process for internal sign-off, including approval from IT, the finance and legal teams, and your board of directors

Blackbaud's K–12 solutions are helping schools break down silos, harness the power of their data, effectively manage the complete student lifecycle, and drive outcomes to foster a sustainable future.

Learn more

About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K–12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at www.blackbaud.com.