

Electronic Education Report



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Business Intelligence on Opportunities in the Educational Software Industry

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EER PULSE

Accessing Summer Reading

- 75% of parents of 5-11-year-old children get books for their child to read in the summer by borrowing them from a library, and 51% have a home book collection.
- 48% purchase print books at a bookstore and 29% download ebooks to a tablet, ereader, smartphone or computer.
- 26% purchase print books online and 18% trade or borrow from a friend or relative.

Source: Survey from Reading is Fundamental and Macy's, June 2014

Accelerate Learning Brings Science Programs to Market

Accelerate Learning (Houston), the science curriculum company started at Rice University, is looking to build on the success it has enjoyed in Texas with the national rollout this summer of three products: STEMscopes NGSS, STEMscopes State Edition K-12 and STEMscopes Early Explorer.

STEMscopes began as an incubator project in the provost's office of Rice started in response to requests from school districts saying they needed help to prepare their students for science assessments. Accelerate Learning is now independent, but still 70% owned by Rice.

The STEMscopes product began with intervention for grades 5-8, expanded out to full K-12 science curriculum and is adding PreK this summer.

See 'Accelerate' on p. 4

Career and Technical Education Interest Growing

Across the states, there is a push to provide more career and technical education options for students; CEV Multimedia (Lubbock, TX), a 30-year provider of curriculum and resources in that area, is taking advantage of that move in Texas with a pilot program with the Frenship school district, which is based in Wolfforth and also serves western portions of Lubbock and southwestern Lubbock County.

Texas HB 5, signed into law in June 2013 aims to better integrate academic and technical education by helping students develop specific workforce skills and better prepare them to meet college readiness standards.

Texas HB 5's main focus was new high school graduation requirements put in place for the 2014-2015 school year All

See 'Career' on p. 6

One-on-One with *EER*:

Transition to Technology-Enabled Classrooms Has Taken Longer than Anticipated, but is Accelerating

Sue Collins, founder and principal of the Collins Consulting Group, has worked 35 years as a teacher, district administrator, state-level administrator and in senior-level positions at Apple, Compaq Computer, Jostens Learning, bigchalk.com and Apex Learning. EER talked with Collins about the current state of the educational technology environment.

Has the transition to technology-enabled classrooms taken longer than anticipated?

I definitely think it is taking longer than we thought it would. We underestimate the enormity and complexity of the K-12 school market and the impact that

local control has. We have a lot of people and locations to advance to get to technology-enabled classrooms with many moving parts around each of them. Even down to simple things, like do we have the right electricity in our schools? It seems silly to even have to think about that, but when you have huge amounts of technology you have to consider it. How do we power devices on a daily basis? Are there enough devices to get to 1:1, which I think is the key to having a fully involved classroom? Do we have the right network infrastructure? Do we have wifi where we need it?

What factors continue to hamper the transition?

Public policy has wavered. Educational technology was a priority, then less priority and then a priority again. We have come up with some really good instructional models, but not everyone has adopted them. Digital content has been a struggle. Teachers need tools to organize digital content and make sure it meets the needs of their kids.



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I do think we are getting there. There is more integration of technology in the normal thought of education. You can see progress. You can see the investment is making a difference.

What tack can the industry take with policy-makers to encourage the use of technology in schools?

There are some things that would be great to advocate for—a constant funding stream, so that every school does not have to go out for an individual bond to get access to get the devices they need. If we get some commonalities among the education customers, that would help move things forward. The SEC chairman was talking yesterday about refocusing the E-Rate funds to provide for wifi in schools. That kind of long-term stability of funding would be really helpful.

What role can content providers play in helping school districts move forward?

Providers need to understand what is going on in education—spend a lot of time talking with educators about their needs. As the publishing business is going from print to digital, teachers are going from stand in front of the classroom to a flipped classroom—totally different methodologies for teaching, different materials being used and a different cycle of learning that most teachers have experienced in their lifetime. Understanding that and providing products that meet the current needs of teachers but also push them beyond what they are doing today requires talking to educators, not sitting in the office and saying technology can do this, therefore we have to make educators do it. That is not the right approach.

There are some well-known educators and school districts that are much further along in their thinking and their progress than what you would think of as a normal school. You need to also talk to the regular school districts that are moving along at their own speed and doing what they can, but have not made the leap to a well thought out instructional strategy that is technology-based. It wouldn't hurt for those of us in the industry also to talk to students.

Is it time to rein in the focus on digital, digital, digital and talk more about learning goals?

I have always said you need to focus on what the instructional goals are and use the technology, and now

the digital content, to help reach those goals. At the same time, I don't think most educators really understand the full capabilities of technology or digital content. It's almost a two-way street. We in the industry have to provide examples of what you can do and the educators have to say, here is what I can do today and here is where I am going, knowing what the technology can actually do.

What would help move the transition to digital content along?

The teachers obviously need more professional development and they need the right tools. Districts need to step up and say if this curriculum doesn't work for us; we can put together our own curriculum and make it work for our kids.

Common Core has given a set of commonalities and that's useful. But many times people say, that's great, but it doesn't work for us, our kids are different. It goes back to the local control that has always been around. We don't want to lose sight of the fact schools have a group of students they need to serve. Putting resources in a space where educators can search them, organize them and use them to use for different kinds of kids is an opportunity.

Why is so much of the current conversation about devices?

It always has been easier to talk about devices than about instructional methodology or instructional content. It's easier to say this has a 9-inch screen or runs the latest OS than to explain the flipped classroom in its 18 different versions. We need the devices to provide the environment where kids can use technology. There certainly is a market for devices, but I see digital content—moving print to digital and providing the tools and infrastructure that help teachers understand and use it—as the biggest opportunity.

Will BYOD be the answer to providing devices to students?

BYOD is a response to a lack of access in schools. If schools had the ability to provide devices, I don't think we would have so many BYODs. I think it is totally appropriate for students to bring their own devices and to use them. It is the matter of equity that causes me difficulty. Some kids are going to have the latest version of an Android or

iPhone and some kids are going to have no Internet connectivity with their phone or no phone at all. Then you have an unequal student experience that goes against the grain of education in this country. I think it will continue, but I hope eventually the funding will be there to provide the right connectivity and content for every student.

Are there common mistakes companies in the market should avoid?

The biggest issue for companies is the lack of validation in the market, the lack of talking to teachers or whoever is going to become the user from the initiation of product development. This is an idea we have, is this the way it works in your classroom? Does it meet the requirements you have for administration and instruction? Continue that process throughout the development, so that when you finish you know the product meets market needs. We all talk about needing to show efficacy, but that is difficult for a new company to do. Any company can talk to educators. And they can extend the educators' thinking about what is possible. I don't think we want these creative, innovative companies to just do what meets the classroom needs today, they need to push the envelope and show there is more that needs to be done.

How would you sum up your feelings looking at the educational technology environment now?

When you think back, we have come a long way. There has been a lot of progress and it is definitely accelerating now. There is more interest from the investment community. There are younger thinkers coming in to new companies with great ideas and a focus on making them work. ■

K12 Inc. Completes Sale of Assets to Safanad

K12 Inc. (Herndon, VA) in June completed the sale of select businesses that will be part of a new global education technology business led by Safanad Limited (New York/Dubai), a global principal investment house.

K12 founder Ron Packard will lead the new venture. Packard resigned his position as the CEO of the virtual education provider in January and left the company board in June to concentrate his efforts on the new venture.

K12 originally saw the new business as a joint venture between Safanad and itself, but that plan fell apart amid discussions about what each of the partners was going to do in particular markets and the new business now is independent of K12.

Safanad, which has an investment focus within the education, healthcare, and financial services sectors, acquired businesses with combined annual revenue in the \$20 million range from K12. They include the International School of Berne, K12's interest in an existing Middle East joint venture currently operating with a Safanad affiliate, and K12's post-secondary business. ■

Accelerate, cont'd. from p. 1

Accelerate Learning describes STEMscopes as PreK-12 science curriculum that puts teacher support at its center. It includes hands-on inquiry kits and primers of background knowledge with math, English language arts and writing connections in each module.

"The assets are completely digital, but the instruction is hands-on," Accelerate Learning CEO Vernon Johnson told *EER*. Johnson said STEMscopes curriculum is in 53% of Texas schools, the majority of which implement it in a traditional classroom environment, although the program also fits in a blended or 1:1 model.

STEMscopes was approved by the Texas State Board of Education in the state's 2014 K-12 science adoption and previously in the 2011 supplemental science adoption.

STEMscopes has succeeded in Texas because the 300 teachers who have built the curriculum based on AL rubrics have made it easy-to-use, practical and relevant, according to Johnson. STEMscopes provide 38-40 resources with every module and encourages teachers to pick what suits their teaching style and the needs of their students.

Johnson said schools like the flexibility of a digital program that can be accessed and updated anywhere/anytime and find the \$5.25 per elementary school student price a good value.

Marketing Plans

While STEMscopes has grown across Texas largely on

word-of-mouth recommendations, AL is investing in sales and marketing as it takes STEMscopes national. The company plans to hire 13 representatives and is looking for science teachers and administrators who understand pedagogy and know science, as opposed to seasoned sales people.

STEMscopes State Edition K12 will be marketed in states that currently are not implementing the Next Generation Science Standards. STEMscopes NGSS is new K-12 curriculum built from scratch for schools where the new standards are being used.

AL marketing manager David Alviar told *EER* that the new standards focus on building a continuum of knowledge across the grade levels as opposed to learning facts about discrete topics. Additionally, the NGSS assessment is based more on argumentation and portfolio presentation than multiple-choice questions.

STEMscopes Early Explorer uses a learning center model to help preschool teachers not trained in science spark interest in 3-, 4- and 5-year-olds. Johnson said there is much attention on high school science and how it can prepare students for college and careers, but AL saw an earlier need and will market its program to public and private preschools and Head Start.

Online Community

Also this summer, Accelerated Learning is launching a free professional development site STEMcoach.com that will provide educators with STEM resources that include lessons with a teacher guide, question prompts, student guide and student journal.

Teachers can also access instructional practice tips, and videos featuring STEM professionals talking about the skills students need to pursue STEM careers. ■

Survey: Games Used Often in Classrooms

A majority of teachers (55%) use games in the classroom at least once per week, and an additional 25% have students playing games at least once a month, according to a survey for Gamesandlearning.org conducted for a report that group will release in late summer 2014.

What other teachers say about a game is the factor that most influences what games teachers select for use in

FACTORS INFLUENCING GAME SELECTION

	% Response
What other teachers say about the game	48%
The game includes assessment/tracking and/or other classroom management features	43%
Your experience using or preference for the game	42%
Research claims/evidence of educational impact	37%
What your students say about the game	31%
How much the game costs	24%
The game's rating (Everyone, Teen or Mature)	17%
A review of the game	15%
Other	3%
Source: Games and Learning	

their classrooms, cited by 48% of respondents in the survey.

The biggest barriers to using games in the classroom are insufficient time (45%) and cost (44%), followed by lack of technology resources (35%) and difficulty in finding games that fit with curriculum (34%).

The survey found desktop computers are used for game-playing in 72% of respondents' classrooms, while 41% use interactive whiteboards or tablets, with tablet use on the rise.

Most students play games with a classmate or in small groups (34% response rate), followed by individual game play at 30% and playing as a class at 17%.

Among surveyed teachers, 47% said it is low-performing students that benefit most from instruction using digital games, with 30% of respondents saying all students seem to benefit equally.

Gamesandlearning.org is a project of the Games and Learning Publishing Council and is produced by the Joan Ganz Cooney Center, which designed the gaming survey that was fielded in fall 2013. ■

Policies Needed as Digital Content Use Expands

The increasing presence of digital educational materials and resources created, modified, used and shared by teachers prompted the State Educational Technology Directors Association, in partnership with Creative Commons U.S., in June to issue a brief that looks at legal considerations and provides recommendations around the use of those materials.

The brief, *Clarifying Ownership of Teacher-Created Digital Content Empowers Educators to Personalize Education, Address Individual Student Needs*, recommends:

1. The state and its districts should have up-to-date policies and practices regarding digital educational content and resources, including policies on ownership.
2. Where the use of OER aligns with the vision for digital educational content, the state and districts should ensure that digital content can be licensed in ways that encourage sharing and customization.
3. The state and its districts should empower educators to create, use and modify digital learning materials.
4. The state and its districts should ensure that educators have access to online repositories that store quality digital education content.
5. States and districts should provide guidance on quality control to ensure digital learning materials are accurate, aligned to standards and appropriate for elementary and secondary classrooms.
6. States and districts should invest in and/or support research on digital learning materials.
7. States and districts should address questions of funding implicated by the use and sharing of digital education content as funding will be required to ensure students have access to digital materials. ■

EMR Research Corner:

Digital Supplemental Product Sales Are on the Rise

Digital products account for between 30% and 40% of total supplemental sales and are growing at a steady rate, according to respondents to surveys conducted over the past three years by Education Market Research.

The EMR surveys show digital products gaining ground on more traditional alternatives as early as 2009. In the latest digital product survey from EMR, respondents were asked to allocate their total PreK-12 supplemental sales by product application or function. The survey gave 23 possible choices plus Other.

If all digital product applications are grouped together, that segment was up 5.6% in 2012. The remainder of the non-digital supplemental products recorded a 4.9% year-over-year decline. Following are some of the product categories where sales increased from 2011 to 2012, according to survey results.

% Change Sales Increase 2012 vs. 2011

Product	% Change
Supplemental Textbooks	21.5%
Online/Digital Content	19.0%
Periodicals	17.0%
Computing/Mobile Devices	7.2%
Interactive Whiteboards	6.9%

EMR Research Corner is a recurring feature of Simba Information's newsletters based on the work of Robert Resnick, Ph.D., following the merger of EMR with Simba Information. More details from the surveys conducted are available in *The Complete K-12 Report: 2014* published by EMR. For more information or to purchase the report, call 888-297-4622 or e-mail customerservice@simbainformation.com. ■

Career, cont'd. from p.1

high school students will take a foundation curriculum that includes four English credits and three credits each in science, social studies and math. Most will then go on to earn fourth credits in math and science, along with other required coursework, when they select a

diploma endorsement in one of five areas: science and technology, business and industry, public services, humanities or a multidisciplinary option.

CEV is working with Frenship's three middle schools to provide eighth-grade students with more information as they consider their endorsement choices. Through its online platform iCEV, the company gives Frenship students access to 700 virtual job descriptions, career playlists and videos, projects and activities.

The Texas initiative is bringing new life to career education, CEV's vice president for brand management Clayton Franklin told *EER*. CEV's goal for the pilot is to learn as the schools learn and update its products to meet schools needs. She anticipates additional Texas districts will be implementing iCEV this fall.

More broadly, CEV provides multimedia-based semester- and year-long courses that are delivered by a district's teachers. The courses include video lessons that can be delivered in segments followed by projects and assessments.

Curriculum is offered in the areas of agricultural science and technology, business and marketing, family and consumer sciences, trade and industry, and career exploration.

"The general careers category has really exploded for us," iCEV president Dusty Moore told *EER*. All of the topic areas are on the rise, Moore said, with specific sub-topics—like biotechnology within agriculture science and technology and entrepreneurship within business and marketing—growing rapidly.

"People realize there is an end goal for students and that is to go out and have happy, successful careers," Moore said.

CEV is seeing broader participation as students accessing career education pursue interests ranging from learning to code to splicing cells or preparing meals in restaurant-style kitchens.

CEV's business also reaches into the community college and technical college market and is seeing increasing interest there, particularly in providing distance learning options for students.

“Our current focus is not just providing curriculum for schools to utilize, but providing curriculum that leads to industry certification for students,” Moore said. CEV is working with industry partners as interest grows in earning certifications for a range of skills from Microsoft Office proficiency to welding.

Offerings from Many Providers

As the interest in CTE education rises, a number of providers are adding to the options available in the market.

Online curriculum provider Odysseyware (Chandler, AZ) this year added 14 more courses to its agriculture and STEM course clusters as the company continues to expand career and technical education course options. Odysseyware offers CTE courses in seven career clusters including business management and administration, hospitality and tourism, health science, human services, food and natural resources, and information technology.

Online learning provider Edmentum (Bloomington, MN) has 16 CTE courses available and will release another 16 in early September. The courses are aligned to the CTE National Career Clusters Framework developed by the National Association of State Directors of Career Technical Education Consortium. Topics include computer science, web design, game development, introduction to fashion design and introduction to accounting.

Virtual schools provider K12 Inc. (Herndon, VA) is having discussions with a number of states about career

technical education opportunities. K12’s Iowa virtual academies will collaborate with Northeast Iowa Community College and the Iowa Association of Business and Industry to provide a three-year, blended-model high school program in advanced manufacturing. ■

WIN Learning Takes a Different Perspective

WIN Learning (Kingston, TN) believes that students can benefit from exposure to employability skills built into curriculum, and from seeing a direct connection between school subjects and how they link with occupational goals, earned income, and increased life options.

“We don’t prepare the learner for a specific certificate if they want to go into nursing or a technical trade, what we do is prepare them with the foundation skills required for any occupation,” John Costilla, WIN vice president, sales and marketing, told *EER*.

The company provides courseware to the K-12 and adult workforce markets and this summer is launching a personalized career readiness system that has four components:

- myStrategic Compass – a personalized career-planning tool based on skill, work and career interest that provides a framework for the education and path to succeed;

EER Stockwatch 2014

Share Price Values for Instructional Technology Providers, June 4-18, 2014
(closing prices)

	Ticker	June 4	June 11	June 18	% Chg 6/4-18	% Chg. YTD
Cambium Learning	ABCD	\$2.20	\$2.02	\$2.00	-9.1%	17.6%
HMH	HMHC	\$18.28	\$19.45	\$19.36	5.9%	14.1%
K12 Inc.*	LRN	\$23.31	\$23.39	\$25.03	7.4%	15.5%
Pearson*	PSO	\$19.41	\$19.02	\$18.92	-2.5%	-14.6%
Scholastic	SCHL	\$31.80	\$32.72	\$33.17	4.3%	-1.8%
SMART Technologies	SMT	\$2.46	\$2.61	\$2.66	8.1%	21.5%
Average for Group		\$16.24	\$16.54	\$16.86	3.8%	2.7%
NASDAQ Nat'l. Mkt. Composite Index		4,251.64	4,331.93	4,362.84	2.6%	4.9%

*K12 and Pearson are listed on the NYSE; others listed on NASDAQ exchanges.

Source: Yahoo! Finance; Simba Information

- College Readiness Courseware – for students looking to continue on to college, this courseware prepares learners with the necessary foundational skills in math and English language arts with practice and application of concepts addressed by commonly accepted college placement exams;
- Career Readiness Courseware – nine career-focused modules that include reading for information, applied mathematics, locating information and business writing;
- Soft Skills – teaches employability and social skills including conveying professionalism, communicating effectively, promoting teamwork and collaboration, thinking critically and problem solving.

A dashboard sits on top of the four modules, tracking learners' progress and awarding badges as users learn skills. WIN will be linking badge levels to the requirements of specific occupations as part of the trend to align what is happening in education to the demands of the labor market.

WIN revamped its career-readiness courseware to focus on in-demand jobs and the high interest skills that are required for jobs. It also added an assessment feature to its college readiness module that helps determine if a student entering college is going to need remedial work before going into credit bearing courses.

Additionally, WIN has two new programs for fifth-to-eighth learners that teach Common Core concepts in the context of careers. WIN Math will be available in August and WIN for English language arts is scheduled for launch by the end of the year.

Partnering State and Local

WIN is working with a number of state and local partners including the Alabama Department of Postsecondary Education which is using WIN to support Career Ready Alabama, a statewide initiative aimed at increasing career or work-ready skills for individuals and providing businesses a tool to help them identify career ready employees.

Four Chicago area school districts recently purchased and are implementing the WIN Learning system to help students develop the academic and foundational skills necessary to graduate from high school and succeed in college, trade school, the military or the workplace. ■

News Briefs

- ▶ Following a six-month pilot, Brevard County (FL) schools will implement a multi-year, district-wide adoption of **ClassLink** (Clifton, NJ) LaunchPad as a single sign-on solution that will be used by all of the district's 8,500 staff and 72,000 students for anywhere/anytime access to all files and folders. The implementation, which is funded through the district's Race to the Top allocation and supports Brevard's BYOD initiatives, will make LaunchPad the framework that ties together the disparate elements that make up Brevard's learning management system.
- ▶ **Schoology** (New York) will supply all schools in Uruguay with the Schoology learning management system, which will power Uruguay's 1:1 instruction program that is intended to deliver instruction and resources while connecting students and teachers in a community platform.

People

- ▶ **SAFARI Montage** (West Conshohocken, PA) in June named **Tim Clark** director of learning innovation, charged with providing digital convergence guidance to customers through strategic planning and professional development services. An educator for 25 years, Clark most recently was coordinator of instructional technology at the Forsyth County (GA) schools.

Partnerships & Acquisitions ...

- ▶ **Curriculum Advantage** (Lawrenceville, GA) is partnering with **Scantron** (Santa Ana, CA) to integrate its Classworks online instructional solution with the Scantron Performance Series and the Scantron Achievement Series to help educators create and administer customized assignments and receive feedback.

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