



**Software & Information  
Industry Association**  
BUILDING THE DIGITAL ECONOMY

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**SIIA Ed Division Webinar:  
2013 SIIA Vision K-20 Survey Results**

**July 10, 2013**

# About SIIA

The Software & Information Industry Association is the principal trade association for the software and digital content industry. The Education Division serves and represents more than 180 member companies that provide technologies that address educational needs.

## Leverage Your Membership & Shape SIIA Initiatives – Join a Committee!

- Membership Programs
- Market Data and Analysis
- Technical & Development
- Global Strategies and Strategic Partnerships
- Games For Learning
- Education Business Forum

Contact Liderby Portorreal for details: [Lportorreal@siia.net](mailto:Lportorreal@siia.net).

## Upcoming Events

**Education Business Forum | [siia.net/etbf](http://siia.net/etbf) | New York, NY | December 10-11**

Sessions provide inside knowledge about the growth in financial investment, policy upheavals, & shifts in the way customers are accessing content.

**Education Industry Summit | [siia.net/etis](http://siia.net/etis) | San Francisco | May 12-14, 2014**

Sessions prepare attendees to build the infrastructure, products, & services to support the changes that schools need.

For further information or to become a member, contact Eric Fredell at [efredell@siia.net](mailto:efredell@siia.net) or 202-789-4464.



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# Key Initiatives



**U.S. Education Technology Industry  
Market: PreK-12**

**Applications Open: August 5**  
[siiia.net/codies](http://siiia.net/codies)

**Applications Open: August 12**  
[tinyurl.com/EBFinnovators](http://tinyurl.com/EBFinnovators)

**SIIA CODiE AWARDS** 2013  
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The logo for the SIIA Innovation Incubator. It features a stylized orange starburst graphic to the left of the text 'SIIA innovation INCUBATOR'. The word 'SIIA' is in a small font above 'innovation', which is in a large, bold, black font. 'INCUBATOR' is in a bold, red, all-caps font below 'innovation'.

# Education Division Team

Members have access to ALL SIIA staff. A full listing of SIIA staff by division can be found on the [SIIA Website](#).

## SIIA Education Division Staff

Karen Billings  
Vice President  
Education Division  
[kbillings@siia.net](mailto:kbillings@siia.net)



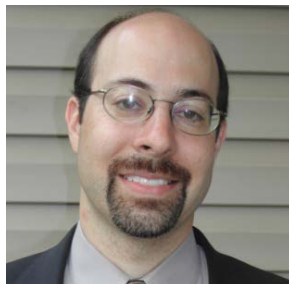
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# Guest Speakers

Sue Collins  
Owner  
CollinsConsult



Susan Meell  
CEO  
MMS Education



# Today's Webinar

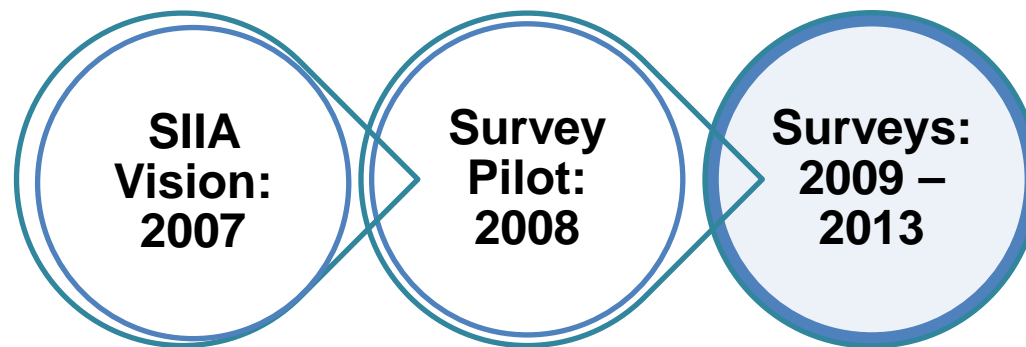
- Welcome/Introductions/Announcements
  - Karen Billings, Vice President, Education Division
- Overview of Vision K20 Survey and Preview of Results
  - Sue Collins, Principal, CollinsConsults & Susan Meell, CEO, MMS Education
- Introductions of Vision K20 Partners
  - Lindsay Harman, Education Market and Policy Analyst, SIIA
- Q&A - Everyone



# SIIA Vision K-20



To ensure that all students have access to a teaching and learning environment capable of preparing them to compete globally and lead the world in innovation.



# SIIA Vision K-20



The SIIA Vision K-20 sets out seven Educational Goals for the use of technology:

1. Help schools meet the **needs of all students**
2. Support accountability and **inform instruction**
3. **Deepen learning** and motivate students
4. **Facilitate communication**, connectivity and collaboration
5. **Manage the education enterprise** effectively and economically
6. Enable students to learn from **any place at any time**
7. **Nurture creativity** and self-expression



# SIIA Vision K-20



To achieve our Vision K-20 SIIA provides five benchmarks (Technology Measures)

1. Using **21st Century Tools** for Teaching and Learning
2. Providing **Anytime/Anywhere** Educational Access
3. Using Technology to Close the **Achievement Gap**
4. Using **Technology-based Assessment** Tools
5. **Enabling the Enterprise** through Technology



# About the Vision Survey

- An online self-assessment tool for faculty, building/district and department/campus administrators
- Consists of 20 benchmark statements indicating progress toward the SIIA Vision K-20 goals
- Provides educators an annual tool to monitor their organization's progress toward the Educational Goals
- Provides SIIA members and education stakeholders a yearly snapshot of the use of educational technology and trends data



# Introduced in 2012 Survey

Expanded benchmark statement to ask about the **ideal level** of technology integration to create a collaborative vision with educators of the future. Example:

## 21<sup>st</sup> Century Tools

**Educational content is delivered flexibly in digital formats, media and platforms.**

	Delivered primarily through print materials	Delivered through print materials and some technology	Delivered through an equal blend of print materials and technology	Delivered primarily through technology with some print-only materials	Don't know/Not applicable
Current	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# New in 2013 Survey

Added 3 questions to better understand 'BYOD' policies:

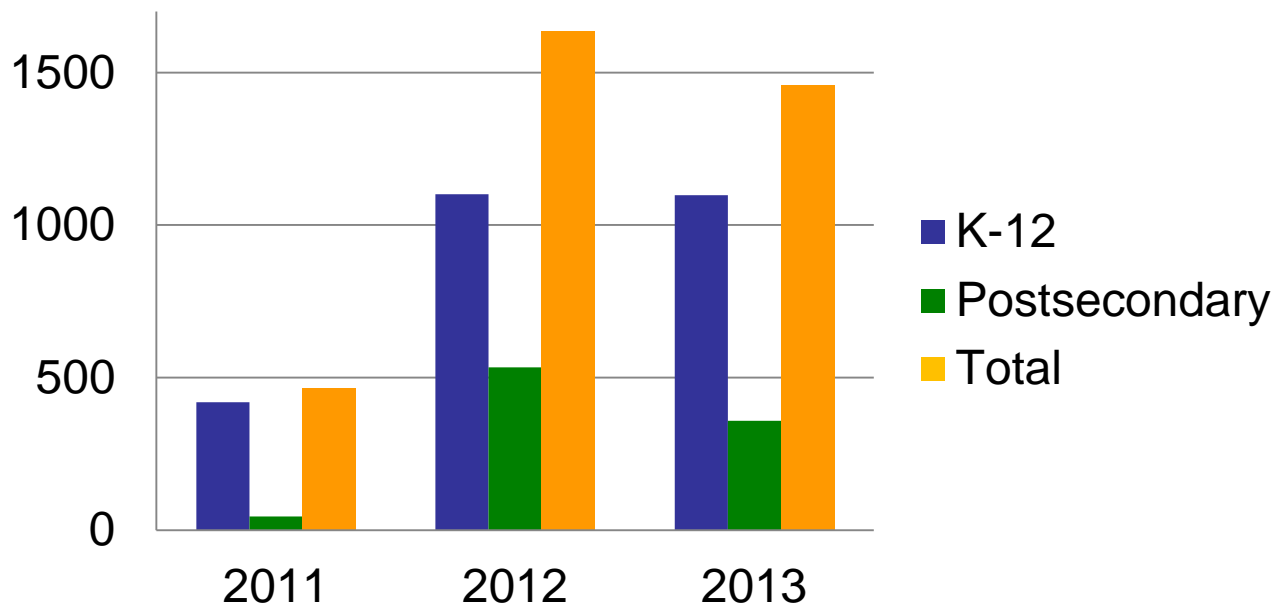
1. Does your educational institution allow students to bring their own mobile devices to use in the classroom?
2. Are there currently any restrictions on the use of students' mobile devices in the classroom?
3. Do you anticipate any restrictions on the use of students' mobile devices in the classroom in the future?



# Results from 2013 Survey

Increase in survey participation from 2011 is maintained with over 1,400 participants this year.

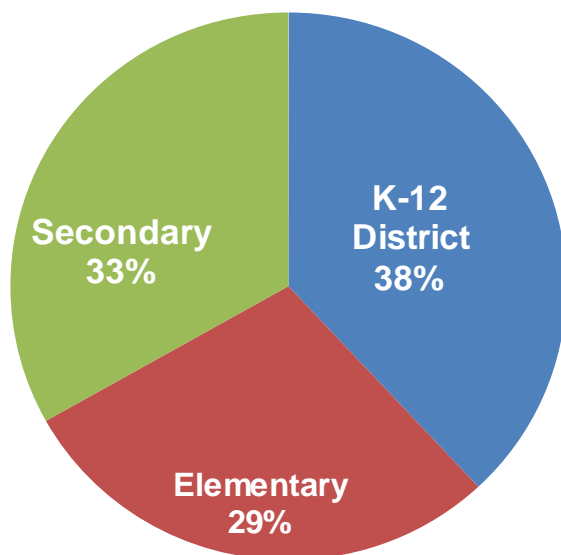
**Survey Participants by Year and Level**



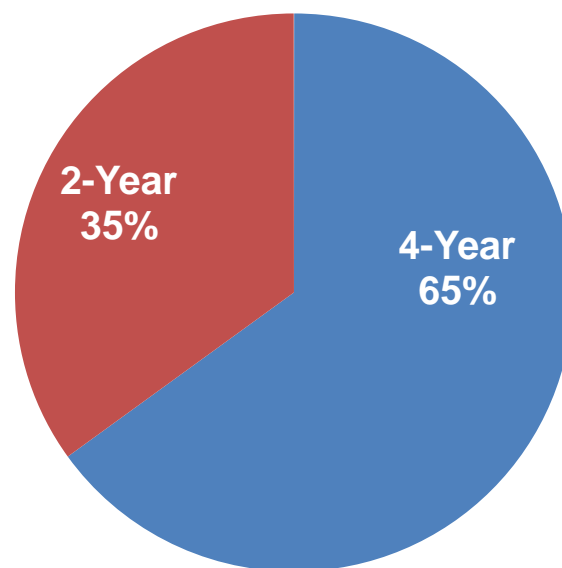
# The 2013 Survey Participants

Survey participants are well distributed between K-12 and Postsecondary schools with good, geographic representation in states with high education enrollments.

**K-12 Institutions**



**Postsecondary Institutions**



# 2013 Survey Participants

Audience consistent mix year over year of approximately half classroom teachers/professors and IT directors, media specialists, administrators and department chairs.

Title	K – 12		Postsecondary	
	2012	2013	2012	2013
Professor/Instructor/Teacher	49%	<b>49%</b>	43%	<b>48%</b>
IT/Technology Director/CTO/CIO	14%	<b>14%</b>	10%	<b>10%</b>
Librarian/Media Specialist	8%	<b>14%</b>	7%	<b>5%</b>
Department Chair	5%	<b>6%</b>	10%	<b>11%</b>
Principal/Asst. Principal	10%	<b>8%</b>	1%	<b>1%</b>
Dean	1%	-	7%	<b>6%</b>



## 'Bring Your Own Device' Policies in the Classroom

Almost half of all Secondary (48%) and K-12 Districts (46%) allow students to bring their own mobile device into the classroom now. Nearly 60% anticipate they will allow within 1 year. Elementary schools are less likely to allow now (20%); more 4 Year Postsecondary schools (95%) allow than 2 year (83%).

Are students allowed to bring their own devices?					
	K-12			Postsecondary	
	<u>Elementary</u>	<u>Secondary</u>	<u>K-12 District</u>	<u>2 Year</u>	<u>4 Year</u>
Yes	20%	48%	46%	83%	95%
Within 1 year	11% 70%	12% 83%	13% 87%	4%	0%
Within 1-5 years	39%	23%	28%	6%	3%
Never	11%	9%	5%	2%	0%
None of the above	20%	8%	8%	5%	2%



# BYOD Policies

Of those that allow mobile devices, K-12 Schools and Districts are more likely to allow with restrictions; Postsecondary schools less likely to impose restrictions.

Grade Level	Allow Mobile Devices in the Classroom NOW	% That Allow with Restrictions	% That Allow Without Restrictions/ Don't Know
Elementary	20%	79%	21%
Secondary	48%	88%	12%
K-12 District	46%	80%	20%
Postsecondary – 2 year	83%	50%	50%
Postsecondary – 4 year	95%	40%	60%



# BYOD Policies

## Most Common Restrictions/Requirements:

- Must follow district/school policy
- Teacher discretion for use in the classroom
- Must use for education purposes only
- Must register device with district/school
- Must have parent's permission
- No twitter, texting, social media, Facebook, games, or music

*“Administration is having difficulty establishing the policies for student usage of mobile devices and what should be the responsibilities of parents and how to enforce the policies. This is a middle school and access to inappropriate content is of concern.”*



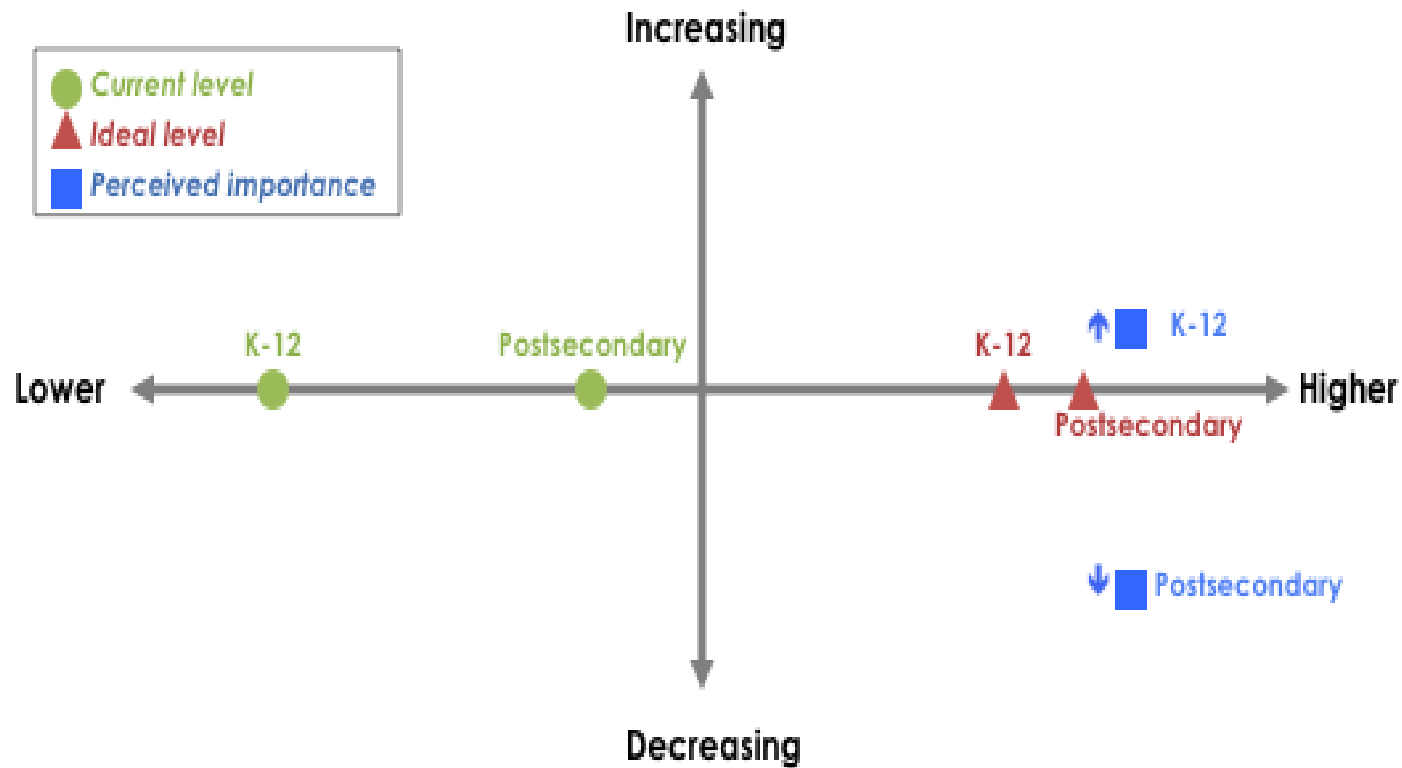
# Key Findings: Current to Ideal Integration

- Very little change in ratings for current and ideal integration between 2012 and 2013.
  - 20% of K-12 and 30% of Postsecondary participants report their institutions are currently integrating technology at a high level.
  - More than 75% of both K-12 and Postsecondary participants rate the importance of technology integration and the ideal level very highly.
- Current usage levels lag ideal usage – a finding consistent on all measures of technology integration.
- Postsecondary participants consistently rate their current and ideal level of technology integration higher than do K-12.
- Level of institution (K-12 vs. Postsecondary) is the strongest and most consistent differentiator observed in reported levels of technology integration.\*

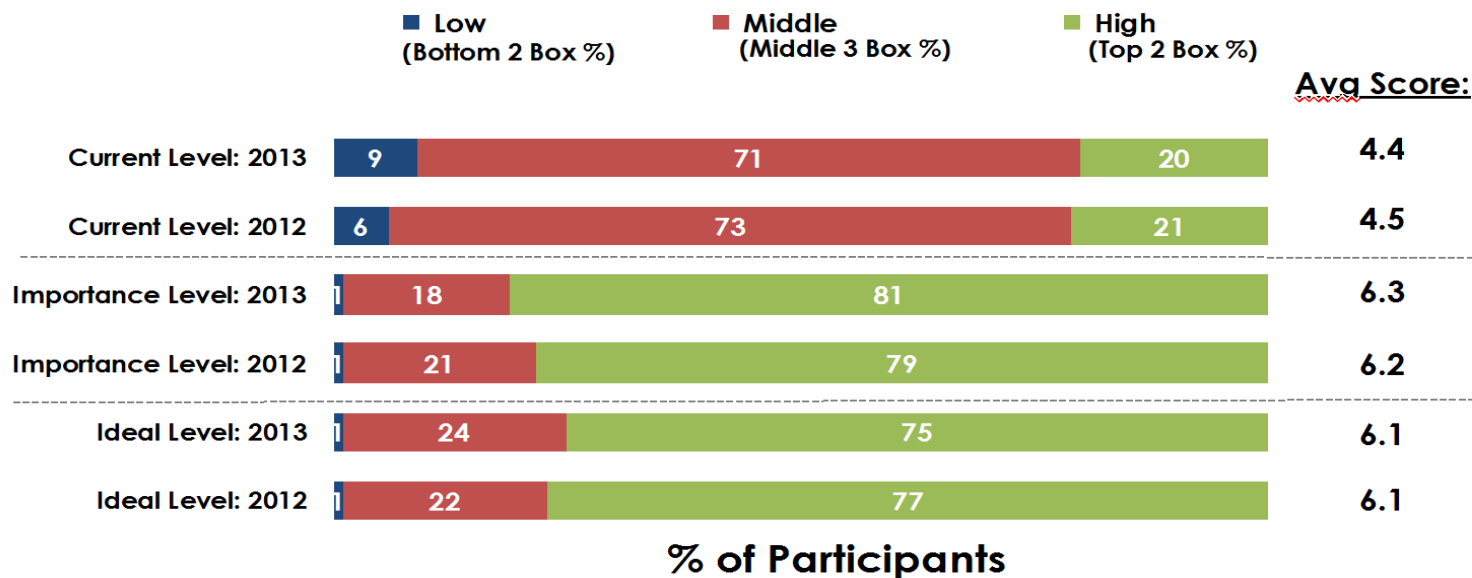
\* While weaker variations across demographic and organizational variables are observed, they generally correlate to these two education levels.



## Level of Technology Integration: Current, Ideal and Importance



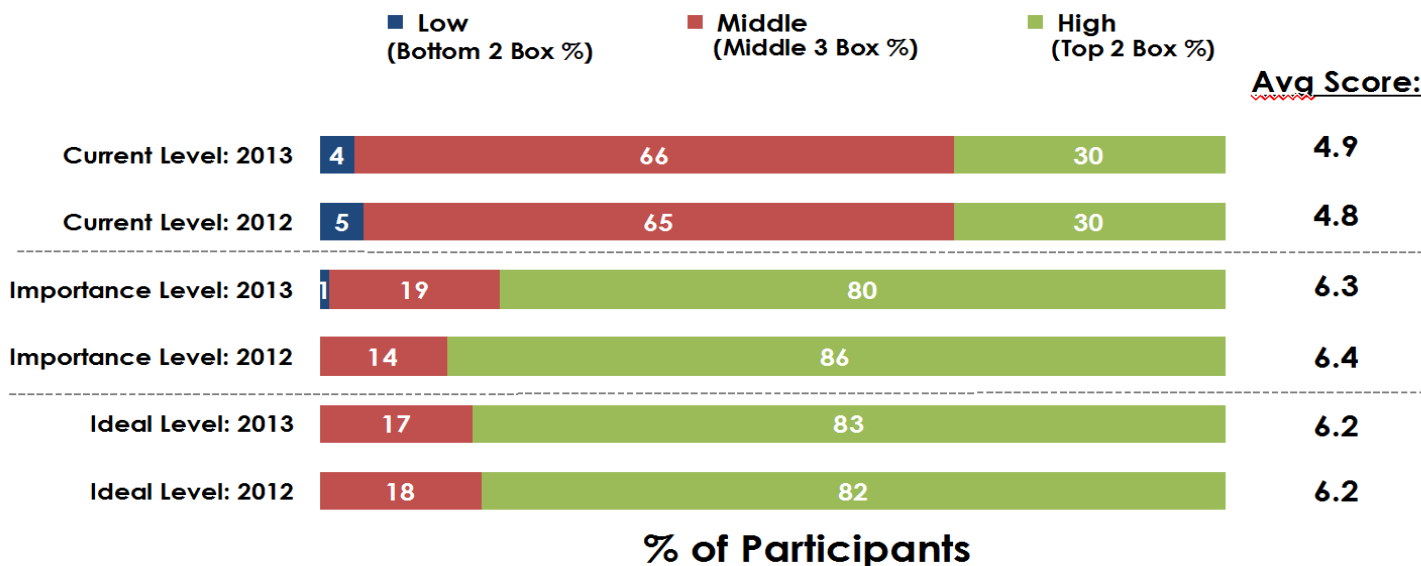
## Stated Level of Technology Integration by K-12 Participants



Participants in K-12 indicate they have room for improvement – **20%** state technology is **highly integrated** in their institution yet **81% believe it is very important** – and **75% indicate high integration is the ideal**. While perceived current usage has dropped slightly, stated importance has increased slightly in 2013.



## Stated Level of Technology Integration by Postsecondary Participants



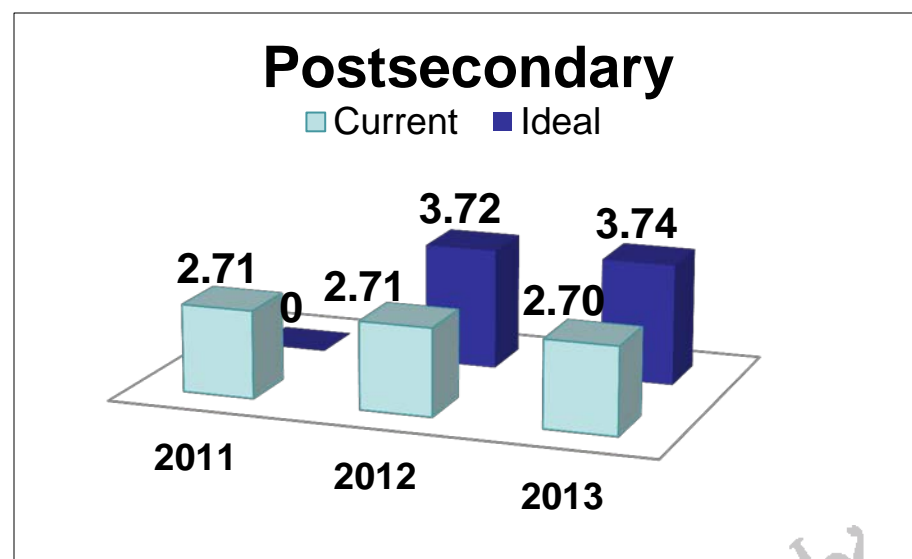
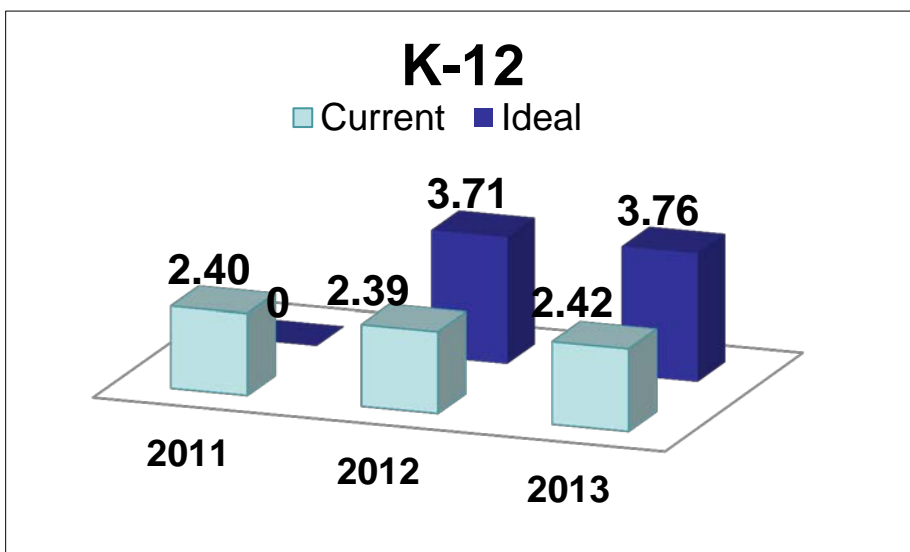
A **greater proportion (30%)** of Postsecondary respondents report a high level of technology integration and **80% say it is highly important and also rate their ideal level highly**. Stated importance of technology integration has decreased slightly since 2012.

. On a 1 to 7 scale, 1 = lowest level, 7 = highest level. Totals may not equal 100% due to rounding.



# Average Benchmark Statements Scores: Past Three Years

- The average benchmark scores have been very consistent the past three years with a slight improvement in K-12 this year.
- Postsecondary exceeds K-12 in current integration, while both have similar scores for their ideal integration.



\*'Ideal' technology integration benchmarking questions introduced in 2012.

## Commonalities Between K-12 and Postsecondary

The four benchmarks with the highest current usage levels have remained the same for the past three years for both K-12 and Postsecondary – and are also among the closest to ideal.

Benchmark Statements– Top Four Benchmarks for K-12 and Postsecondary	K-12 Current	K-12 Gap to Ideal	Postsec. Current	Postsec. Gap to Ideal
<b>Security tools</b> are used to protect student data and privacy	3.40	.53	3.45	.48
<b>Access to adequate bandwidth</b> is available for robust communication, administrative and instructional needs	3.14	.84	3.27	.67
<b>Access to adequate bandwidth enables instructional uses</b> that include collaborative learning, video-based communication and other multimedia-rich interactions	3.06	.90	3.28	.65
<b>An institution website/portal provides the education community</b> with access to applications, resources and collaboration tools	2.83	1.10	3.15	.79



## K-12 Benchmarks with Greatest Changes in 2013

Very few benchmarks have significant changes in scores from last year. Greatest positive change is in adequate bandwidth for collaborative learning, video-based communication and other instructional use (+.11) and assessments (.08) with greatest negative change in access to adequate bandwidth for communications, administrative and instructional needs (-.10).

Category	Benchmark Statement	Average Score Change 2013 : 2012
<b>Anytime/Any where Access</b>	Access to adequate bandwidth enables instructional uses that include collaborative learning, video-based communication, and other multimedia-rich interactions	+ .11
<b>Assessment Tools</b>	Technology-based assessments measure a full range of 21st Century skills and knowledge	+ .08
<b>21<sup>st</sup> Century Tools</b>	Access to adequate bandwidth is available for robust communication, administrative, and instructional needs	- .10

Q1-20 benchmarking questions rated on 1-4 scale, with 1 = lowest level of agreement and 4 = highest level of agreement. Benchmarking statements with => .08 differences in average score between 2012 and 2013 listed. Changes listed may vary slightly from previous chart due to rounding.



## Postsecondary Benchmarks with Greatest Changes in 2013

Very few benchmarks have significant changes in scores from last year. Greatest positive change is in differentiated learning and/or online tutoring for all students (+.10) with the greatest drop in access to adequate bandwidth for robust communication (-.17).

Category	Benchmark Statement	Average Score Change 2013 : 2012
<b>Differentiated Learning</b>	Electronic supplemental instructional resources and/or online tutoring are accessible to all students	+ .10
<b>21<sup>st</sup> Century Tools</b>	Access to adequate bandwidth is available for robust communication, administrative, and instructional needs	-.17
<b>Anytime/Any where Access</b>	Ubiquitous, reliable access to resources and services is available through a multitude of mobile devices and through wireless/wifi access points	-.10
<b>Enterprise Support</b>	Institution leaders use technology tools for planning, budgeting, and decision making	-.09

Q1-20 benchmarking questions rated on 1-4 scale, with 1 = lowest level of agreement and 4 = highest level of agreement. Benchmarking statements with => .08 differences in average score between 2012 and 2013 listed. Changes listed may vary slightly from previous chart due to rounding.



## Key Findings: Technology Measures and Seven Educational Goals

- Average scores for the Five Technology Measures and Seven Educational Goals have been relatively consistent for past three years for both K-12 and Postsecondary.
- Comparing current scores with ideal scores for each measure and goal indicates that educators have a vision for how they would like technology implemented. While most do not see 100% technology integration as the ideal level across all benchmarks, the gap between ideal and current usage scores indicates room for improvement and a desire to improve.



## Ideal Scores for Technology Measures Show Similar Priorities for K-12 and Postsecondary

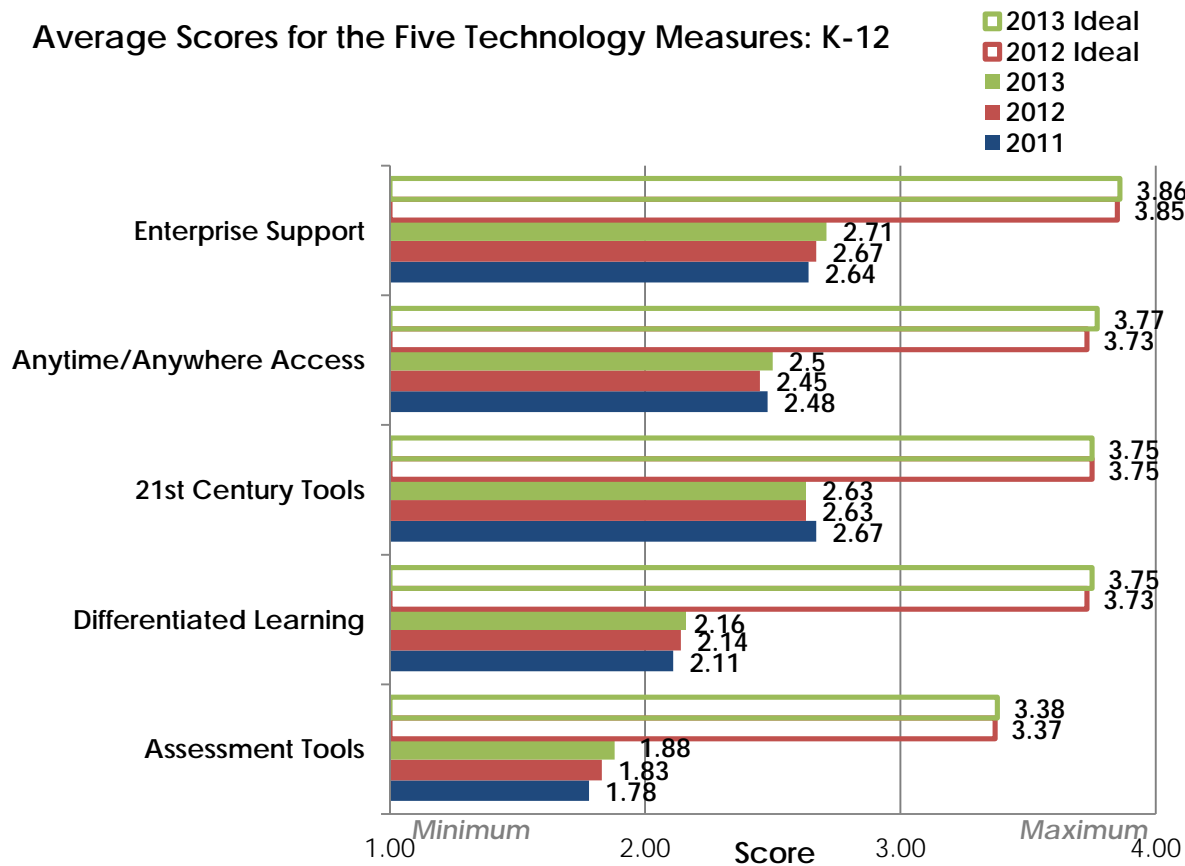
K-12	Score	Postsecondary	Score
Enterprise Support	3.86	Enterprise Support	3.87
Anytime/Anywhere Access	3.77	Anytime/Anywhere Access	3.80
21 <sup>st</sup> Century Tools	3.75	21 <sup>st</sup> Century Tools	3.76
Differentiated Learning	3.75	Differentiated Learning	3.75
Assessment Tools	3.38	Assessment Tools	3.42

K-12 and Postsecondary are closely aligned in terms of the ideal level for the Technology Measures. Both rate Enterprise Support as most important and Assessment Tools as least important in terms of ideal level of technology integration. All scores very similar to 2012 scores.



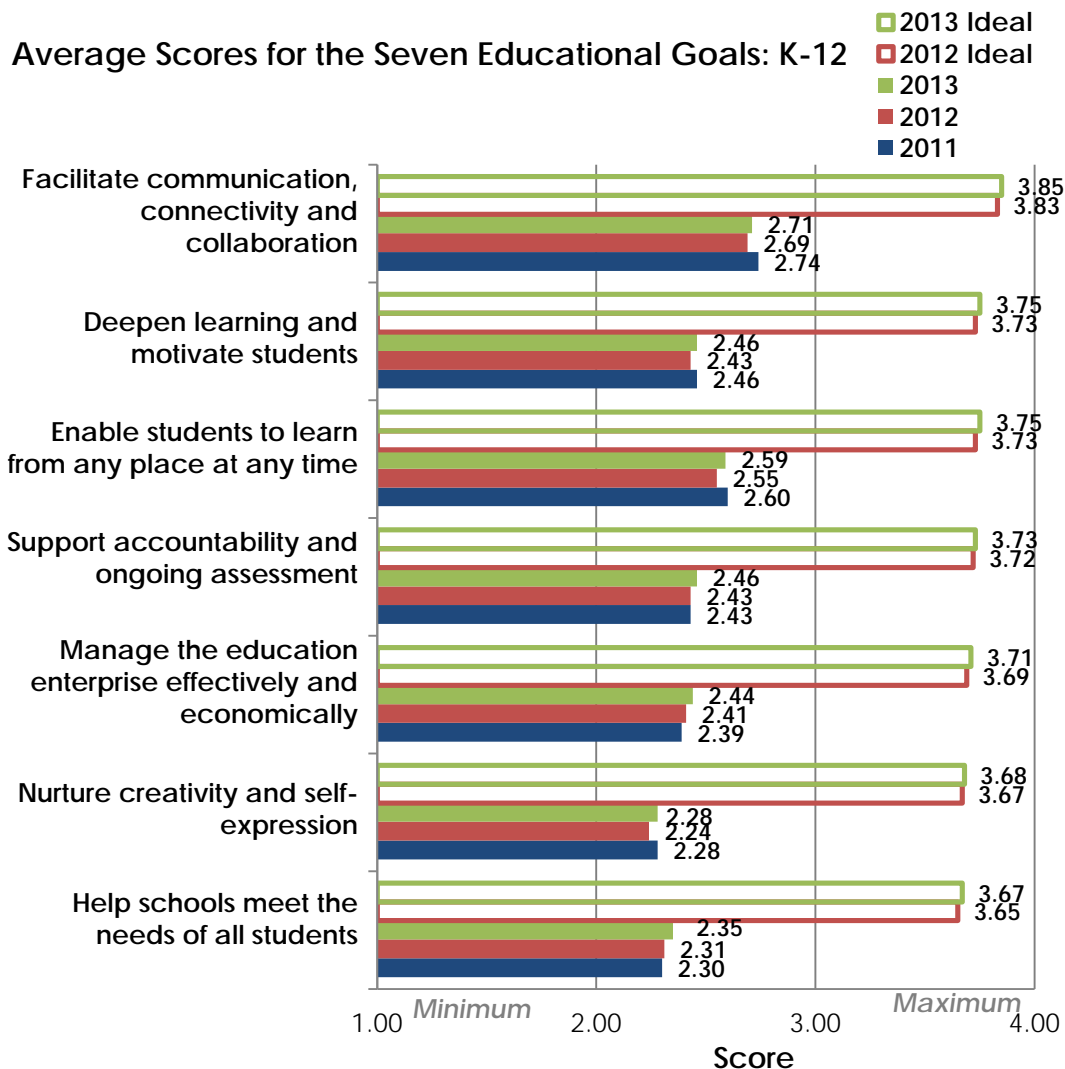
## Technology Measures: Comparing Ideal to Current Implementation Scores for K-12

Average Scores for the Five Technology Measures: K-12



*“EETT funds and a very forward thinking Information Technology Director for our district has ensured that we have consistent hardwiring and wireless capabilities...”*  
**Secondary Teacher**





## Seven Educational Goals: Comparing Ideal to Current Implementation Scores for K-12

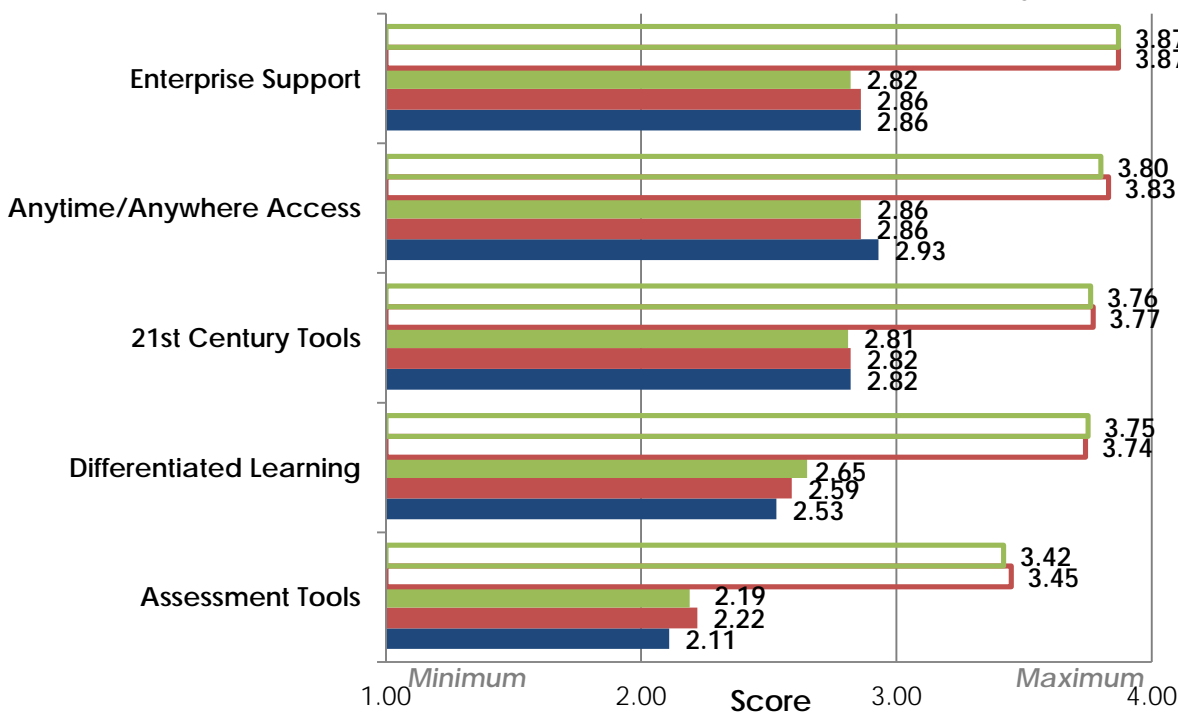
*“We have new administration that is moving our school quickly toward stronger and wiser use of technology both in the classroom and for business and administrative endeavors.”*  
**Elementary IT/Technology Director**



## Technology Measures: Comparing Ideal to Current Implementation Scores for Postsecondary

Average Scores for the Five Technology Measures:  
Postsecondary

2013 Ideal  
2012 Ideal  
2013  
2012  
2011

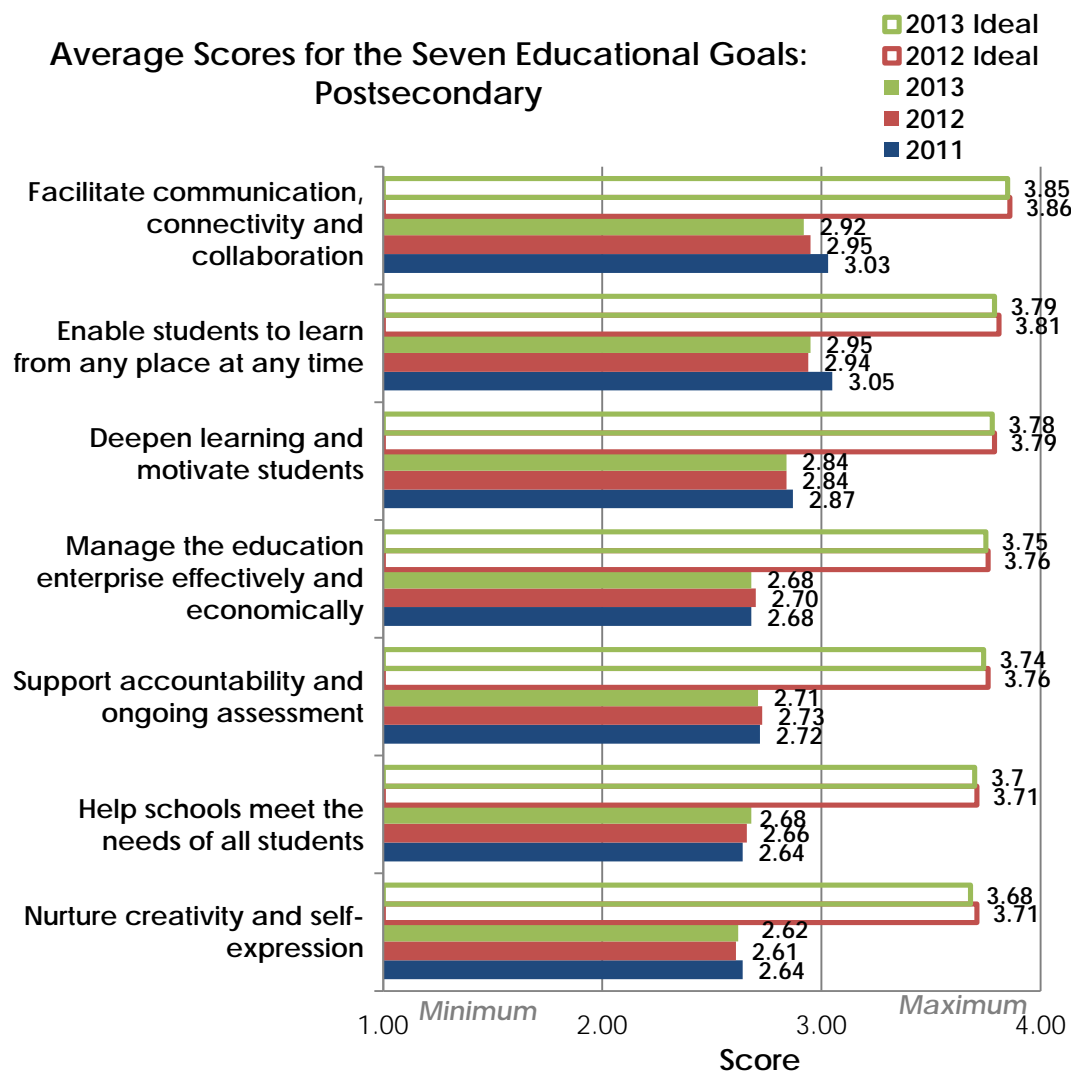


*“The conversation around here is still somewhat in the dark ages, i.e., the University President asking how advising is done for students not on campus. Some leadership heads are just not getting the paradigm. But we are trying.”*

*Instructional Technology/Design  
Postsecondary, 4 Year*



# Average Scores for the Seven Educational Goals: Postsecondary



## Seven Educational Goals: Comparing Ideal to Current Implementation Scores for Postsecondary

*“Having all the access in the world and the ability to locate it, still, does not make for a smarter, thinking student. i.e. the ability to read a map does not make you a good explorer. They just think they are.”*

*Professor  
Postsecondary, 2 Year*



## Other Comments from Survey Participants

*"This is an important survey. I look forward to reading the results and learning how they will be used to improve technology-delivered education to rural academic institutions, including tribal colleges."*

*Librarian/Media Specialist  
Postsecondary, 2 Year*

*"Technology is a useful tool, but too many people see it as the answer to all education's problems. Solve poverty first."*

*Teacher  
Secondary*

*"This is a waste of time. No one cares, no one acts on this."*

*Teacher  
Postsecondary, 4 Year*

*"Wonderful, innovative, interactive approach and system to gather data to improve digital learning currently and to advance further now and in future!"*

*Teacher  
K-12 District*



## Challenges to Reaching Ideal Levels of Implementation

Based on these comments and others provided by survey participants, the greatest challenges to reaching the goals and ideal level of technology implementation include:

- **Funding** - Finding reliable, ongoing funding to support technology and the staff, training, and support needed to implement it successfully.
- **Leadership** - Having leadership who understand technology, are making appropriate instructional technology decisions and implementing them.
- **Time** - Finding the time for educators to learn, implement and evaluate the use of technology to advance education goals.
- **Technology Obsolescence** - Adapting to changes in technology, such as implementing upgrades and appropriate level of filtering within educational institutions.
- **Accessibility** - Broader access from outside the school, such as the home (especially in rural areas), in addition to accessibility by disabled students.



## Notable Highlights

- The survey shows consistent results for K-12 and Postsecondary when compared to previous years, **indicating schools are holding up in spite of the economy and budget cuts.**
  - At the K-12 level, perceived current technology usage has dropped slightly while stated importance has increased, indicating possible growing awareness of importance of technology and lags in integration.
  - At the Postsecondary level, stated importance of technology integration has decreased slightly since 2012. Along with a higher level of current integration compared to K-12, this may indicate an emphasis on the appropriate level of focus on technology as a tool in a broader educational environment.
  - Both K-12 and Postsecondary indicate they are experiencing problems maintaining adequate bandwidth for communications, administrative and instructional needs.
- K-12 is behind the Postsecondary market in terms of BYOD but is gaining ground. BYOD most likely to be allowed in middle and high schools compared to elementary schools. Most have policies with restrictions.



# Notable Highlights

- There is little variation between 2012 and 2013 scores on benchmarking questions, indicating a possible stagnancy in decision making and implementation of changes.
  - The items that are **closest to ideal integration (broadband/security systems)** may suggest that it is easier to increase implementation for technology where the buying and decision-making process is controlled by fewer people and is not dispersed among an entire teaching staff.
  - The items **farthest from ideal integration (ePortfolios/online professional learning)** are somewhat more complex initiatives that often involve larger investments and are usually purchased and implemented at the district level.
- The survey indicates that Educators in both K-12 and Postsecondary have a vision and desire for integrating technology at a much higher level than they currently have, but need the support and assistance to make that happen.



# What's Next

- We are implementing a new version of the survey, currently in beta testing, with more precise benchmarking questions and new ratings scale for the 2014 survey. Some longitudinal measures will be maintained with current survey.

<http://visionsurvey2013beta.questionpro.com>



# We Appreciate our Vision Partners

- The Big Deal Book
- Campus Technology
- Consortium for School Networking (CoSN)
- Curriki: The Global Education and Learning Community
- Digital Learning Day
- eCampus News
- edWeb
- eSchool News
- Global SchoolNet
- iNACOL
- Intel Worldwide Education
- International Society for Technology in Education (ISTE)
- iPoPP
- JDL Horizons
- THE Journal
- The League for Innovation
- NISAD
- Project Tomorrow
- SmartBrief
- SXSWedu
- TechLearning.com
- Technology Leadership Network within NSBA
- Today's Catholic Teacher Magazine
- University Business
- WeTheTeachers



For further information and to support SIIA's Vision K-20  
and other initiatives, please contact:

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