



a vision for K-20 education



2014 Results from the SIIA Vision K-20 Survey

EXECUTIVE SUMMARY

June 2014
Software & Information Industry Association



Data analysis and final report provided by MMS Education



About SIIA and the Education Division

The SIIA is the principal trade association for the software and digital content industry. SIIA provides global services in government relations, business development, corporate education, and intellectual property protection to more than 800 leading software and information companies.

SIIA's Education Division serves and represents more than 180 member companies that provide software, digital content, and other technologies that address educational needs. The Division shapes and supports the industry by providing leadership, advocacy, business development opportunities, and critical market information. SIIA's Education Division provides a neutral business forum for its members to understand business models, technological advancements, market trends, and best practices. With the leadership of the Division Board and collaborative efforts with educators and other stakeholders, the Division undertakes initiatives to enhance educational technology and the success of SIIA members.

For more information, see: www.siaa.net/education/.

ABOUT THE VISION K-20 CONTRIBUTORS

The SIIA Vision K-20 initiative has many contributors who have supported the project since its inception.

We would like to thank the following Education Division Committees and members for their contributions to the development of the initiative:

SIIA Education Division Board of Directors
SIIA Education Division Working Group on the Vision K-20 initiative
SIIA Education Division Marketing Committee
CollinsConsults
The Winter Group
Paula Maylahn Consulting

We also appreciate the work of the SIIA staff: Karen Billings, Lindsay Harman, Liz Martin, Jonathan Magin, and Mark Schneiderman.

We especially thank MMS Education and consultant Karin Pavlovic for their data analysis and production of the final report. Their work on the Vision K-20 survey and their analysis of the results made a huge contribution to the initiative and we appreciate their work in developing the new survey benchmarks for 2014. www.mmseducation.com

We also appreciate the work of all our member companies (listed in the addendum), educators, representatives of the technology industry, and the education community for contributing to the initiative.

Please contact the SIIA Education Division if you have suggestions for or comments about this document. Email: education@siaa.net

Executive Summary

INTRODUCTION

The SIIA Vision K-20 Initiative promotes the best uses of technology to ensure that all U.S. students have access to an environment capable of preparing them to compete globally and lead the world in innovation. The Vision K-20 Survey is an annual online self-assessment hosted on SIIA's Vision K-20 website for educators and educational leaders in K-12 classrooms, schools, and districts and postsecondary courses, departments, and campuses. It consists of 37 benchmark statements indicating progress toward the SIIA Vision K-20 goals and measures. New benchmark statements were tested in a separate beta study in 2013 to create a baseline for 2014.¹ All benchmark scores from 2013 in this report are from the separate baseline study, while all other longitudinal data is from the primary 2013 survey. Statistical significance testing at the 95% confidence level between years is introduced this year.

The 2014 Vision K-20 report analyzes the results of nearly 1,000 surveys completed by educators representing all levels of K-20 education. The data collected from these educators has shown the ideal level of technology integration to be significantly higher than current levels, indicating that educators have a desire to integrate technology at a much higher level. The current level of technology integration is on par with 2013, with some benchmarks showing directional signs of improvement and a few showing statistically significant improvement over the previous year.

In addition to the benchmarks, the 2014 version of the Vision K-20 survey asked questions about Bring Your Own Device (BYOD) implementation in schools, and institutional preparedness for online, summative assessments, to see how schools are adapting to new technology options.

DEMOGRAPHICS

The demographics of the participants in the 2014 survey are very similar to previous years. More of the participants are female than male, particularly in the K-12 segment; a majority have more than 15 years of experience, and the median age was 53 years. Close to half describe their role as "Professor/Instructor/Teacher." The chart that follows shows the distribution of the responders from the last three years across the various segments of K-20 education.

Education Level of Institutions Represented in Surveys

	2012	2013	2013B	2014
n=	1635	1457	312	981
K-12	67%	75%	78%	88%
Elementary	24%	22%	17%	27%
Secondary	18%	25%	30%	28%
K-12 District	26%	28%	31%	33%
Postsecondary	33%	25%	22%	12%
2-Year	9%	9%	5%	5%
4-Year	23%	16%	17%	8%

2013B= Data from new benchmarks baseline conducted in 2013.

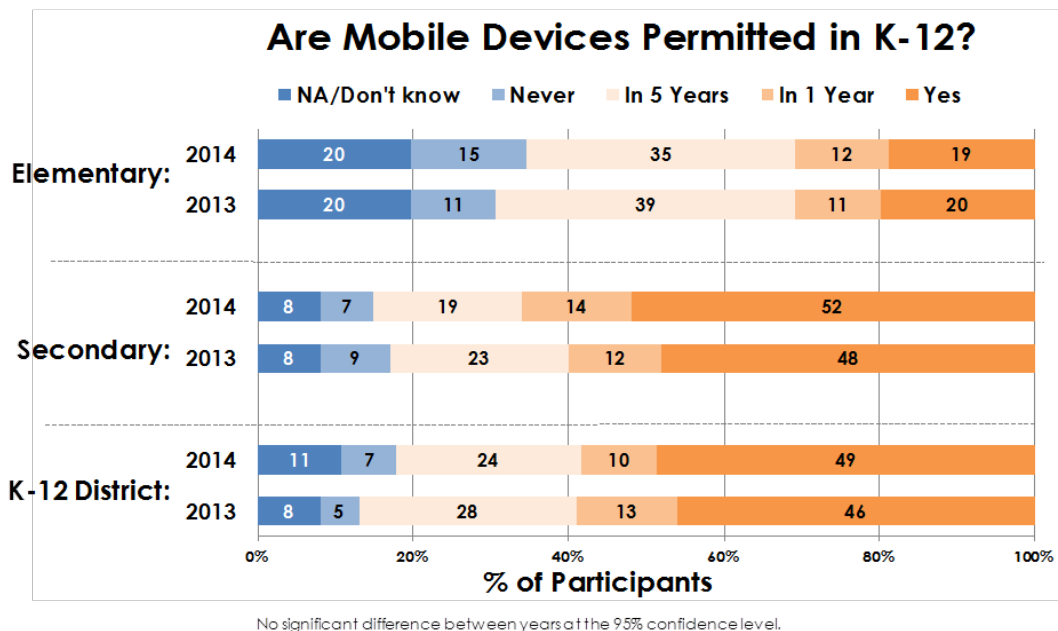
¹ More details about the 2013 baseline study can be found in the appendix.

KEY FINDINGS

BYOD is expected to increase

Both the K-12 and Postsecondary segments indicate increasing usage of mobile devices. While almost all Postsecondary participants report mobile devices are allowed in the classroom, usually without restrictions, K-12 respondents more commonly enact restrictions when they are allowed, especially at the Elementary level. In K-12, mobile devices continue to gain greater acceptance at the Secondary level than Elementary level, following similar findings in 2013. Secondary participants who are currently allowing BYOD or will within one year, increased from 60% in 2013 to 66% in 2014, while Elementary and K-12 District participants remained static (at 31% and 59% respectively). Among postsecondary, 2-Year and 4-Year participants are at parity this year with approximately 90% currently accepting mobile devices in the classroom.

The K-12 participants forecast an ongoing increase in the use of BYOD with 85% of Secondary, 66% of Elementary and 83% of K-12 District participants saying mobile devices will be allowed within the next five years.



Across all K-12 and Postsecondary participants, mobile devices are used most frequently in the classroom to access and research digital content online. The next most frequently cited reasons for using mobile devices in the K-12 classroom are to create content, develop skills, and communicate and collaborate. In Postsecondary classrooms, the next most cited reasons are to access e-textbooks and instructional materials.

Many in K-12 do not feel 'highly prepared' for online, summative assessments

This year educators were asked how prepared their institutions are for online assessments in terms of adequate bandwidth and devices. Many (almost 60%) do not feel 'highly prepared' with adequate bandwidth or with adequate devices and hardware for their students – a definite concern as online testing related to Common Core inches closer to implementation.

% Highly Prepared for Online Summative Assessments (Top 2 Box %)		
	Adequate Internet Bandwidth	Adequate Devices/Hardware for Students
Elementary	41%	32%
Secondary	40%	36%
K-12 District	42%	36%

Perception of current technology integration shows directional increase

In the beginning of the survey, participants are asked to rate their overall current and ideal level of technology and the general importance of integrated technology. The current level of technology integration has shown a slight, directional increase for both K-12 and Postsecondary compared to 2013 but importance level and the ideal level have shown a statistically significant decrease. The overarching message is that there is still a significant gap between the current and ideal level and technology integration continues to resonate as very important for these participants.

Overall Levels of Technology Integration (Top 2 Box %: Participants who Report High Importance/Integration Levels)			
	2012	2013	2014
K-12			
Highly important	79%	81%	76%
Highly integrated: Current level	21%	20%	22%
Highly integrated: Ideal level	77%	75%	72%
Postsecondary			
Highly important	86%	80%	77%
Highly integrated: Current level	30%	30%	37%
Highly integrated: Ideal level	82%	83%	74%

Statistical testing not shown.

Comparison of benchmarking scores for K-12 and Postsecondary

The average current and ideal usage scores for the 37 benchmarking statements in 2014 are on par with the 2013 baseline scores for both K-12 and Postsecondary, showing a slight directional increase. The higher the score, the closer the institution may be to achieving the benchmarks of the K-20 Vision.

	Average <u>Current</u> Benchmark Score		Average <u>Ideal</u> Benchmark Score	
	2013	2014	2013	2014
K-12	3.95	4.05	6.28	6.33
Postsecondary	4.53	4.68	6.06	6.36

Statistical testing not shown.

Highlights of K-12 current benchmarking scores

Many of the K-12 benchmarks show directional improvement compared to 2013 and several have statistically significant increases, indicating progress in these areas toward the Vision K-12 goal.

Top Ten Benchmarks for K-12: Current Usage Scores	2013	2014
Security tools are used to protect student data.	5.57	5.65
Security tools are used to protect students' online privacy.	5.52	5.51
Information systems track institutional data.	5.15	5.13
Institution leaders use technology tools for budgeting.	4.75	4.94
Students have access to digital educational content online.	4.51	4.77
Information systems are used to establish educational accountability.	4.59	4.76
An Institution website/portal provides the education community access to appropriate resources.	4.54	4.73
Institution leaders use technology tools for planning.	4.46	4.73
Information systems track student performance for decision-making.	4.50	4.62
Online access through wireless/wifi is reliable.	4.35	4.57

Statistical testing not shown.

Highlights of current Postsecondary benchmarking scores

The top ten current usage benchmarks for Postsecondary tend to show less directional improvement and many are on par with last year. For both K-12 and Postsecondary, the ideal score is significantly higher than the current score on every benchmark, in both 2013 and 2014, indicating that most participants aspire to a higher level of technology integration

Top Ten Benchmarks for Postsecondary: Current Usage Scores	2013	2014
Security tools are used to protect student data.	6.03	5.82
Students have access to digital educational content online.	5.77	5.78
Security tools are used to protect students' online privacy.	5.98	5.72
An Institution website/portal provides the education community access to appropriate resources.	5.56	5.45
Information systems track institutional data.	5.54	5.28
Online access through wireless/wifi is reliable.	5.28	5.19
Online courses are available to all students.	4.73	5.17
There is ubiquitous online access through wireless/wifi.	5.51	5.17
Institution leaders use technology tools for budgeting.	4.82	5.14
Digital educational content can be accessed through multiple platforms.	4.75	5.08

Statistical testing not shown.

SUMMARY

The survey indicates that **Educators in both K-12 and Postsecondary have a desire to integrate technology at a much higher level than they currently have, but need support and assistance to make that happen.** As technology evolves and technology solutions expand, there may be new opportunities to reach ideal goals with more cost-effective and less hardware-dependent solutions.

With minimal changes occurring year to year, what will it take to accelerate the pace for leveraging technology and transforming K-20 education institutions? The findings of the Vision K-20 Survey indicate the work is not complete. **Education stakeholders face significant work to achieve the Vision K-20 goals and increase opportunities for all students to fulfill their promise through technology-supported education.**

With the support of SIIA members and partners, SIIA will continue surveying faculty and administrators to track this rate of change. More importantly, SIIA, SIIA members, and other education stakeholders will continue to support educators making the transition from print to digital. We will also continue to call on education market leaders and policy makers to increase investment, leadership, and support to ensure the nation's educational system can innovate and compete on a global scale.