Helpful Tips when Preparing to Change Student Management Plan Systems

**Marissa Ximenez, TCASE Services Inc-empoWEr,
Gayla Fair, Boerne ISD**

TCASE
interactive
2023
you are our people

Helpful Tips When Preparing to Change Student Management Plan Systems

Marissa Ximenez LSSP, empoWEr Training Manager
Gayla Fair, Assistant Director of Special Education, Boerne ISD

1

Is it time for a change?

- Deciding to change student management systems
  - Looking at your systems objectively will help you to identify issues that may have been 'swept under the rug' or that haven't previously been considered critical. While individual issues may seem fairly minor, once you start to add them up you may find it difficult to justify continuing to wrestle with a system that doesn't fit your needs.

2

Reasons for Changing Systems

The reason for switching can vary for districts:

- Seeking a user friendly system
- Easily access the information you need for reporting
- Desire to experience No technical issues
- $$$-Annual renewal is no longer affordable
- Outgrowing software
- Diminished Value
- Functional Requirements
- The need for better Integrations
- The district Deserves Better customer service

3

Getting Prepared

Changing your student management system is 100% achievable, you just need a solid plan in place. Here are some key considerations you need to make for the change.

4

Before Speaking to Vendors

Involve Stakeholders

- Determine who will be involved in this project and their role
- Purchasing Department contact
- IT Manager
- Representative from relevant departments/roles
  - Conduct smaller brainstorming sessions

5

Timelines

Once you have your stakeholders involved, determine your timeframes.

This may vary for each school, consider how many people are involved, other pending projects and the districts/charters specific approval process.

Work backwards from anticipated launch date.

Generally allow 6 months to determine needs, research systems, communicate with vendors and implement software.

6

Budget

Know an approximate budget allocated for switching systems

Is your goal to maintain your current budget?

Are you looking to reduce the amount of your budget spent for your software?

If you are wanting to reduce your budget, be upfront with your sales representative so they can offer a proposal that fits your budget.

7

Taking the First Steps

Mapping your Software

- Look at the systems and district processes you have in place
- This will help determine functionality of the new system
- Speak with each department about their needs, what systems they currently use and challenges they are facing

8

Project Goals & Priorities

Your district goals and priorities will help determine what vendors to consider

Goals may include:

- Consolidating systems
- Specific additional features or functions
- Easier integrations or better connections between information systems and softwares
- Time savings (through workflow and automation)
- Better value/cost saving
- Improved stability

9

Identify Potential Roadblocks

Key Staff Availability

Concurrent Projects

Blockers

Operational Impact

10

Create a Functionality List & Do Your Research

You possess a clear vision of your desired outcome

Next step:

- Create a list of functionality "must-haves" for your new system
- Compare all of the options available
- Research includes feedback from current districts, just ask about their experience

11

Navigating the Next Phase of Action

It's time to formally evaluate the selected vendors

Determine how you take requesting and receiving information from vendors

- Request for Information (RFI)
- Request for Proposal (RFP)
- Vendor quote/Proposal

Timeframes for vendor response depend on your school's internal processes, but it is good to provide a rough outline of when you expect to get back to the companies that have responded to either type of request

12

Be Conscious of Financial Implications.

Determine the expected costs for the new system

- Consider travel expenses for training
- First year cost vs. consecutive year cost

How do I pay for this?

- Budgement amendment
- Payment aligns with fiscal year

Operate within the confines of your budget and make it clear to your new vendor that exceeding allowed expenses is not an option

13

Opt for a System that has a Team of Experts in your Specialized Program Areas and Data Expertise

For a smooth switch choose a provider who can offer you straightforward advice on what data you need to bring across to the new system.

Ask for specifics on what type of data you will need from your current system that can be used in your new system

Give yourself plenty of time to review your data before you send it to your new provider.

A Student Management Plan System who works closely with TEA and federal departments will be able to keep their system's validation up-to-date, helping with your compliance.

14

Speaking of Data, What happens to our records?

Your records belong to your district/school

If you are solely relying on your current student management plan system to house your student files, plan on having an additional backup of files

Once you leave your current student management plan system, your online files will not be easily accessible

15

Top-Notch Training is Imperative

The success of your staff relies heavily on the crucial aspect of receiving training of the highest caliber from the new student management system.

Coordinate with your trainer to determine dates that align with your professional development schedule.

Strategically coordinate staff members' schedules in accordance with their program and specific roles.

Plan follow-up online training sessions at regular intervals throughout the year to provide supplementary support for staff as needed.

16

Decide on a Training Approach

Elect a training option that is well-suited for your district/charter

- In-person
- Trainer of Trainers
- Instructor-led training
- Video training
- Online/virtual training

17

Ongoing Support and Updates

Is support available, and through what channels can it be accessed?

What does this support look like?

It's also important to be aware the needs of your school will evolve and grow over time, and a good system should evolve and grow alongside you.

As the driving force behind the software, and its reason for existing, schools should have a key role in directing and shaping the functionality behind it – and the vendors should be ready and willing to listen.

18

Can We Do This Successfully?

Yes!

Switching is achievable, you just need to pick a student management plan system who have a history of providing excellent support to their customers; who will guide you patiently through the change, and without question or complaint, continue to support you into the future.

19

Sometimes the grass is greener, you just have to be brave enough to leap the fence.

20

Thank you for attending!

Marissa Ximenez, LSSP	Gayla Fair
Training Manager	Assistant Director of Special Education
TCASE Services Inc - empoWEr	Boerne ISD
512-474-4492	gayla.fair@boerneisd.net
marissa@tcase.org	
www.empoweriep.com	
www.tcaseservices.com	
www.tcase.org	

21