ATLIS
Association of Technology Leaders in Independent Schools

Capital Purchasing Framework

This resource was created as an ATLIS Leadership Institute R&D project. Thank you to the following thought leaders:

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Introduction

Navigating the process of changing or updating systems in schools requires a strategic approach to ensure successful implementation. This comprehensive framework for planning capital purchases is designed for anyone involved in the decision making and acquisition of big-ticket items for their school. It provides a structured guide to consider various factors before making significant changes. It begins with a thorough needs assessment to identify areas for improvement, followed by goal setting to define the objectives of the capital purchase. Financial planning, research, stakeholder engagement, and pilot testing are essential steps to ensure informed decision-making and buy-in from all involved parties. Implementation planning, monitoring, and evaluation ensure that the chosen systems align with the school's goals and requirements, while sustainability and scalability considerations guarantee long-term viability. Lastly, documentation and knowledge transfer ensure that staff are adequately equipped to utilize the new systems effectively. By following this framework, schools can navigate the complexities of system changes with confidence, ultimately enhancing educational outcomes and operational efficiency.

Needs Assessment

Before anything can get started in the replacement process, the first piece that needs to be put into place is to take a current inventory assessment. It is imperative to identify what machines are currently in your environment so you can determine the need for replacement.

"What do I even look at first?"

After taking a current inventory you might be saying "I have a lot of equipment, what do I even look at first?" There are 5 main factors to consider.

1. **Age of Equipment:** This is most likely going to be the primary factor in determining replacement as older machines are more prone to failure and may not be able to support

or be compatible with future software. You need to look at when certain equipment's end of life is to determine when in your cycle replacement will fit in.

2. **Performance:** After tallying inventory, it's important to look at the performance of your equipment. Is the equipment still meeting the needs of the user and your school? Is it falling short? With workloads changing throughout the year it is important to keep tabs on how your equipment is handling and adapting to the needs of your school. If it starts to fall short you may want to start thinking about replacements.

3. **Maintenance Costs:** This may be one factor that gets overlooked most of the time. When we think about replacing technology the actual physical replacement is what we think about and not necessarily the costs of maintaining that new equipment or even the cost of maintaining old equipment. So things like network administration, patch management, backups, insurance, disaster recovery, etc. All the things that go into making sure your technology equipment stays running smoothly need to be assessed. It may be more cost effective to replace old equipment rather than continuing to try to maintain it.

4. **Security:** This is vital to any school as old technology can be more vulnerable to security threats as they may not be able to get the most up to date security updates/patches available. A risk assessment needs to be conducted on your current inventory to identify what needs to be replaced first.

5. **Industry Standards:** It is important to stay up to date with current industry standards and regulations. Not only is it a good way to ensure you are staying in compliance with any state/government regulations, but it is also a great way to future-proof yourself when newer technologies come out. Will your current equipment be able to seamlessly integrate with new technology? If you have already bought new equipment with this in mind, you'll be in a better position when inevitably that new technology releases. Also by using industry standards, you can feel confident in the quality and reliability of your equipment as the standards provide a good benchmark for what to look for in deploying and replacing equipment.

Decision Making

Now that you have discovered your needs, it's time to take stock in what new fleets or replacement fleets you have to focus on for the upcoming purchasing period. Are you adding new technology this period? New technology being introduced into your domain is inevitable. Does the new replace the old technology to save you some budget? Does this alter any

replacement cycle you have already put into place? If you haven't instituted a replacement cycle, how do you even begin to establish the rotation? Now is the time to dive into your Needs Assessment List to establish a starting point.

High priority issues will be front and center. Where are the biggest needs for replacement and how will their failings affect the environment they are in? Are you using an MDM (Mobile Device Management) to help you manage your OS and iOS fleets? If so, part of your work will be much easier to assess simply by running reports for version history and battery life. But this may not be as easy to track with your servers or WAPs (Wireless Access Points). Documentation is your friend. Hopefully, there is some sort of documentation of when non-MDM devices were put into the field so that a life-span can be associated with the unit. As we know, some tech fails before it may have been expected to go and this should be documented when it is replaced. By staying as close to a replacement cycle as possible, you should be able to reduce those pesky unexpected failures by up to 90% and keep your school running more efficiently.

"Documentation is your friend."

Now is the time to start setting up those small group meetings. It's important to interact with your team to discuss movement to new or different devices for the infrastructure of your school. Perhaps it makes more sense to move your on-prem to cloud services. Does your team have the band-width to make that move at this time or does it need to wait for another year? Does the wait coincide with your budget for replacement? As you move through the upgrading of your fleets in technology, assessing whether the current devices in use are still the right platform/set up for your school's needs. When replacing devices for student use, it is highly recommended to meet with your teachers to discuss what they will be using the devices for, what software or apps are being used, and what size is best for the age. This is particularly important for multi-platform schools. It may only be the need to discuss the software/apps being used which may determine hard drive space. It will also be helpful to identify usage in the classroom. Will you need to have a 1:1 fleet per student or 1:1 per grade level where the device is shared?

Decision Process for Device Upgrade:

- Discuss with teachers (in small groups):
    - Purpose of device usage in classrooms
    - Required software and applications
    - Ideal device size based on student age groups

- Identify classroom usage patterns:
    - 1:1 device per student
    - Shared devices per grade level

The meeting process may be a circular process, specifically as you speak with your faculty regarding student use devices. Initial conversations will spark further larger group meetings to clarify broader use through classrooms by students. For example, your First Grade faculty states they only need one fleet of 20 iPads to share between 2 classrooms but these same iPads should be able to go with students to Spanish and Art at the same time. Will the Specialists be using the iPads on the same days? Chances are, there will need to be a total of 2 carts for First Grade having a 1:1 device per student. Will iPads be the right option if faculty is moving more toward web-based sites and away from apps? In this case, it may be time to move to ChromeBooks or see if those sites also have iPad apps.

Do you have a Bring Your Own Device component to your student used devices? Have you considered the cost factor for those students purchasing a device? Every school has a different structure in how your student BYOD is set up. If you are requiring students to bring a device of their choosing, you may want to offer an option to purchase through your department with a select choice of devices. As students and families choose the device they would prefer; you can then order those devices, send the charges through your Financial Aid department for any reductions to cost, and then the remainder is billed to the families through your Accounting Department. When considering your devices offered this way or as a department recommendation for students purchasing one platform, consider the durability and life of the product so as to reduce the turnover for students over their time at your school.

You are now at the point of needing to get buy-in from your stakeholders and move on to securing your budget. Your stakeholders may be your department, your faculty needing devices for students, or possibly even your Administration and Board Members. This level of buy-in will be determined by the requirements of your school and what it is you need buy-in for. We will go into more of this in the next section.

Gaining Support and Buy-In

With any capital purchase, you need to assess who will be affected by the change or upgrade. Sometimes, the community is not affected at all, but more often than not, you will need to communicate the change and get buy-in from your constituents.

Understanding the reason for the purchase is crucial. Your community will need to see the benefit. You need to be able to convince your constituents that your solutions have value to them. If you are not certain that your choice is the best choice, getting buy-in from your community will be challenging. If you know your plan has shortcomings but is ultimately the best solution, it is important to share that information at the onset.

Determining who will be affected by your purchase is necessary. The impact of your purchase should be assessed across your constituents. It is very important to understand who will support the project and who will oppose it. Often, more than one constituent group will be affected, and those effects will need to be communicated in different ways. Finding the right supporters to champion your cause will also assist in the process.

"Buy-in takes work, planning, and communication."

When communicating with the stakeholders, it is important to judge the level of impact to determine what type of communication works best. A small change may only require an email explaining what is new, but other projects may dramatically affect one or multiple groups in your school. Those projects will need to be communicated differently. This may involve webinars or in-person presentations where questions can be asked. Allowing for this level of discourse will help ensure your community feels heard and that somebody can address their concerns.

Identifying Stakeholders (Depending on School Structure and Project Size):

- Staff
- Faculty
- Student
- Administration
- Board Members
- Parents

It is also important to have an idea of potential concerns. Addressing them in communication will help put your community at ease and let them see that you have thoroughly considered your decision from multiple angles. Supporting the decision by connecting it with your strategic plan or learning outcomes goes a long way. Data-driven support will help you sell the project and deter the opposition.

Utilizing community members to vet your solution can also help gain support. For example, purchasing a few options of new laptops and having a handful of faculty and staff test them will allow your community to see you are considering their opinions. It will also allow your constituents to get a preview of potential devices.

Buy-in takes work, planning, and communication. If you are willing to listen to the stakeholders who will be affected by the change you want to implement, it will go a long way. Your community will ultimately support your decision if they feel they were included in the process.

Financial Considerations

Ensuring effective management of school technology finances involves assessing the current budget, exploring additional funding sources such as grants and donations, prioritizing spending on critical needs, and responsibly handling old equipment through options like selling or recycling. Collaboration with key stakeholders like the C.F.O. and Development office, and ensuring Diversity, Equity, and Inclusion (DEI) considerations are integrated is essential for successful financial planning and sustainability in technology initiatives.

Here are the key points to remember (lifespan and replacement cycle: varies between four and seven years depending on the device type):

Research typical lifespans of similar technologies:

1. **iPads:** With leasing agreements typically lasting 3-5 years and options to buy out the lease, schools have flexibility in determining the lifecycle of iPads in their environment. Depending on factors like lease terms, technological advancements, and the device's condition, it might be more cost-effective to buy out the lease and continue using the device for an extended period, potentially up to five years.

2. **Laptops:** The lifecycle of laptops can vary widely depending on leasing agreements, insurance coverage such as AppleCare for Apple products, and ownership decisions. Leasing agreements for laptops often range from 3-4 years with options for buyouts. If insurance coverage aligns with the device's lifecycle, it can influence the decision to upgrade or extend usage. Owning the device outright can also extend its life cycle, especially if it remains functional and meets the school's needs.

In both cases, factors like technological advancements, maintenance costs, and the evolving needs of users, including considerations of Diversity, Equity, and Inclusion (DEI), play crucial roles in determining the optimal lifecycle for electronic devices in an educational environment. Regular evaluations and strategic decisions, guided by DEI principles, can help schools maximize the value and efficiency of their device investments.

"Account for growth and expansion."

Develop a long-term replacement plan:

Decide on the cycle that works best for your school's technology plan. That may require discussion and planning with your C.F.O. or Business Manager to decide on the terms of your agreement with your device vendor.

Factor-in maintenance and upgrade costs:

Factor in device replacements in your costs. Do not buy the exact amount, account for growth and expansion. You may need to replace devices outside of the scope of insurance.

You may need to consider an upgrade rollout over time. One example may be upgrading AV equipment in classrooms. You might need time to work through multiple school breaks to purchase and install equipment. This could take one or more school years to complete.

Funding Options:

Assessing your school's budget and seeking additional funding is key for technology projects.

Here's how to do it:

1. **Check your budget:** Talk with your C.F.O. about your school's budget for technology. See if it matches your long-term plans. If it's not enough, work with them to adjust it gradually. Focus spending on what's most important for teaching and learning.

2. **Look for outside funds:** Explore grants and donations beyond your budget. Work with your school's Development office to find grants from the government, foundations, or businesses. Also, use events like Galas to gather donations from families and alumni. Make sure these funds are used for tech projects.

3. **Set Priorities:** Within your tech budget, prioritize spending, taking into account Diversity, Equity, and Inclusion (DEI) considerations. Think about what's urgent, like updating infrastructure or providing teacher training, in a manner that promotes equitable access and opportunities for all students. Allocate resources to initiatives that foster diversity, equity, and inclusion, ensuring that technology investments support the needs of all learners. Regularly review and adjust your priorities based on changing needs, ensuring that DEI principles remain central to decision-making processes.

Managing school technology finances involves checking the current budget, adjusting if needed, seeking extra funding through grants or donations, prioritizing spending on crucial needs through a lens of Diversity, Equity, and Inclusion (DEI), and considering options for old equipment like selling or recycling in a manner that promotes equitable access and opportunities for all students. Collaboration with key players like the C.F.O. and Development office, while incorporating DEI principles, is key to success.

Value of Old Equipment:

Assessing old equipment is important for getting the most out of it and being environmentally responsible.

Here's what to do:

1. **See if You Can Sell or Trade It:** Check your lease agreements to see if you can trade in or sell your old equipment. Some vendors let you exchange it for credit toward new purchases. You can also sell it to refurbishing companies for extra cash. Consider organizing yard sales for staff to buy old equipment at discounted prices.

2. **Think About How to Dispose of It Responsibly:** If the equipment is too old or broken, look into responsible disposal options. E-waste recycling companies can handle electronic devices safely. Make sure to wipe any data first. You could also donate it to charities, schools, or community groups.

3. **Consider Its Value When Buying New Equipment:** When you're looking at buying new technology, remember the value of your old equipment. Think about how much you could get from selling or trading it in. This can help you decide when to upgrade and make the most of your investments.

By carefully assessing old equipment, thinking about responsible disposal, and considering its value, schools can manage their technology resources well. Working with vendors, recyclers, and charities can make the process smoother and help the environment too.

Implementation Plan

The implementation plan is a roadmap for executing the project after the above steps have been taken, and final approval, and funding has been secured. During this process, as with all the other steps highlighted above, it's critical to stay in touch with key stakeholders. Involving

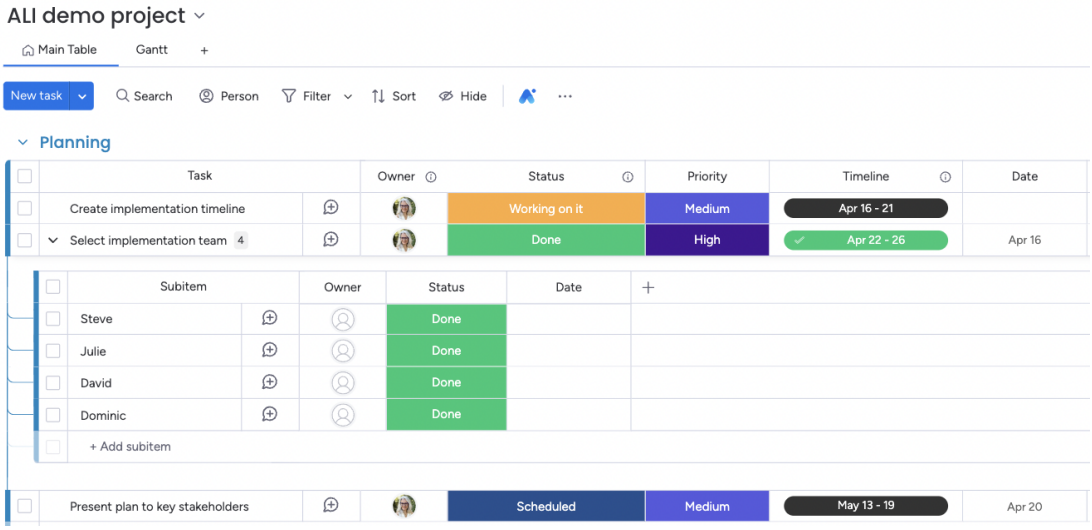
stakeholders early and throughout the process ensures they feel heard, which contributes significantly to the project's success.

"Stay in touch with key stakeholders."

Here's the implementation plan breakdown:

Planning & Organization:

- Meet with key stakeholders, present your implementation plan and ask for their feedback. Key stakeholders can be administrators, department heads, a special committee with faculty and staff volunteers, and even a group of student leaders.
- Check with key stakeholders and the school calendar manager before creating the final implementation timeline.
- Use project management software (e.g. Monday.com) to stay organized and share tasks or milestones with your team and key stakeholders, and outside vendors as needed.



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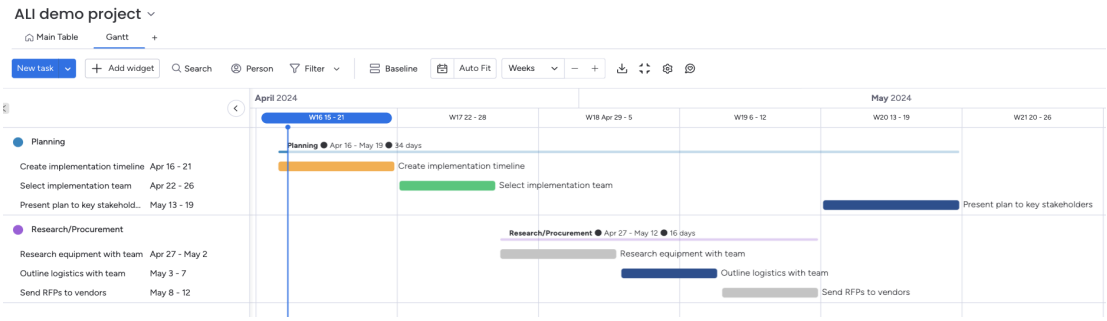

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Staffing:

- Select and schedule the tech implementation team. For larger projects like a new phone system or wifi installation, you may need to hire outside consultants.

Research & Selection:

- Schedule the implementation team to meet and outline the logistics of the project and research the materials required.
- Sends RFPs (Request For Proposals) to at least three vendors. Consider including women- and minority-owned businesses, as well as small, local businesses in your selection. For a hardware replacement project like an iPad fleet, obtain a quote from a single, previously vetted vendor like Apple.
- For larger projects or new vendors, evaluate the vendors based on AI risks, data protection practices, and compliance (FERPA and GDPR if applicable) before selection.

Purchasing:

- Select the vendor and send the contract to the CFO for review and approval.
- Check with the business office before choosing a purchasing method (purchase order, credit card, or net terms invoice).

Equipment Logistics:

- Schedule the equipment delivery.
- Find a secure storage space for the delivered equipment.
- Set up the workspace where the team will unbox, configure and test the equipment.
- Asset tag and inventory all equipment.
- Update your system documentation.

Equipment Configuration:

- Configure, and test the equipment. We strongly recommend setting up a pilot program with several users from the community to test the equipment before the official school-wide roll out.
- Create training materials (digital and conventional).

Deployment, Roll Out or Cutover:

- Communicate with stakeholders the day/time of the cut over at least two weeks prior to the roll out. Schedule individual or group hands-on sessions in advance as well if needed.

Training:

- Provide training during the roll out using conventional and digital methods. Some users may prefer hands-on sessions, while others are more comfortable with emails with embedded video instructions for example.
    - Assess the roll out a few weeks after the initial launch and send out a survey to users to see if more training is needed.

Equipment Disposal:

- Decide how to dispose of old equipment, then update your inventory accordingly. Here are some options:
    - Recycling.
    - Donating.
    - Selling (Ebay, Craigslist, trade-in programs, other schools) – the revenue may help offset the cost of the new equipment as mentioned above in the Financial Considerations section.
    - Adding to the loaner pool. Equipment may have to be reconfigured, so this could be a summer project.

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Disclaimer

The information contained in this document about information technology (IT) and its applications in schools is provided based on general knowledge and understanding. It is intended for personal use and informational purposes only. While efforts have been made to ensure accuracy and reliability, individual experiences with IT implementation and usage may vary. Therefore, any actions taken based on this information are at your own risk. For specific advice or guidance tailored to your unique circumstances, it is recommended to consult with IT professionals or relevant experts.

Sources

Nash tech; Monday.com; Sell/Trade Equipment;

Branson School; The Pingry School;, Gilman School; The Bush School; St. Bernard's School.

Resources

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