



***What K-8 Educators are
Saying Now...
About Supplemental Materials***

AEP Summit 2006

Presented by:
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MMS Education

June 8, 2006

Special thanks and appreciation....



About MMS Education

- Education market specialists
- Helping clients reach the education market since 1977
- Publisher's publisher
- Based in Newtown, Pennsylvania
- Stop by and say hello at Booth #4

MMS Core Capabilities

- Strategic Planning
- Market Research
- Marketing/Event Management
- Content Development
- Sales and Outreach
- Information Technology Solutions



Education is our only business

We have been honored to work with many distinguished clients since 1977.

Some of these include:

Educational Testing Service
The Walt Disney Company
The College Board
Evan-Moor Publisher
Perfection Learning
GTE Foundation
Dairy Management Inc.
Houghton Mifflin
National Science Foundation
USA Today
Turner Broadcasting
U.S. Army and Army Reserve
PLATO Learning
PASCO Scientific

Riverside Publishing
Time Warner
McGraw-Hill
Marco Polo/Verizon Foundation
Time-Life Education
PBS
Pearson Learning
Verizon Communications
Triumph Learning
NASSP
Sesame Street
The New York Times Company
Globe Fearon
The Field Museum

Market Study

- **Decision-making**
- **Use of supplemental materials**
- **Textbooks vs. supplemental materials**
- **Format preferences**
- **Look to the future**
- **Suggestions and recommendations for supplemental publishers**

Methodology

Online surveys

- Sent to 5,514 district/building level
- Districts > 2,500 students
- Top 20 states
- One reminder email sent
- Incentive - drawing for 10, \$50 Amazon gift certificates
- **3.3% response rate (176 completed surveys)**

Methodology

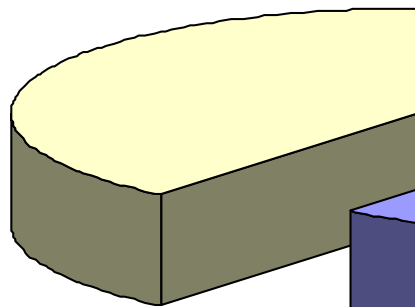
Telephone Surveys

- Purchased 2,019 names
- Districts > 2,500 students
- Incentive drawing for 10, \$50 Amazon gift certificates
- **113 completed surveys**

Market Study

289 Participants

**Telephone
Survey
113
39%**



**Online
Surveys
176
61%**

Participants – 20 States

Northeast - 16%

- MA
- NY
- NJ
- MD
- PA

Southeast - 26%

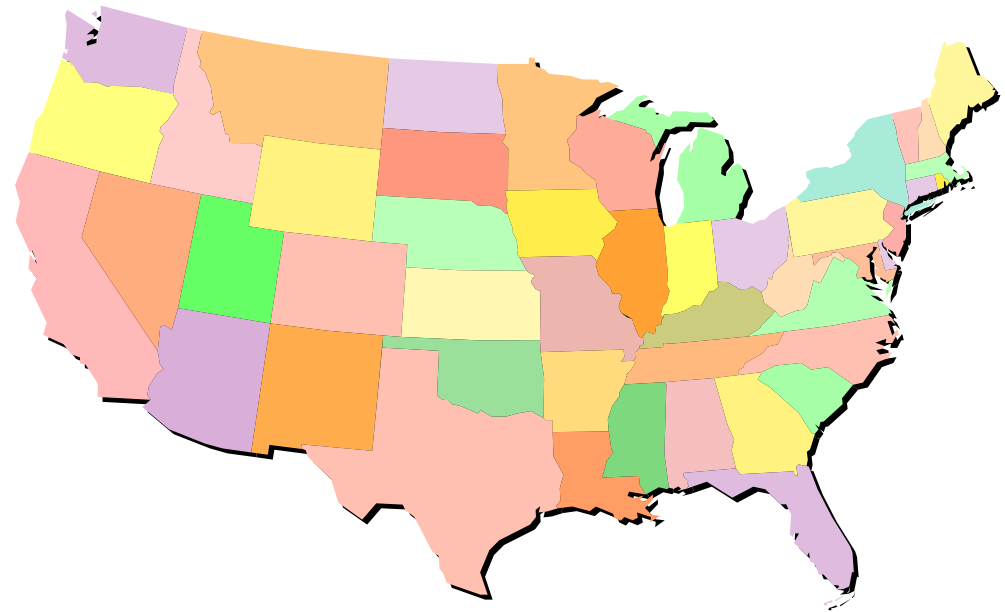
- GA
- FL
- LA
- NC
- VA

Midwest - 21%

- IL
- IN
- MI
- MO
- OH
- WI

West - 36%

- CA
- CO
- TX
- WA

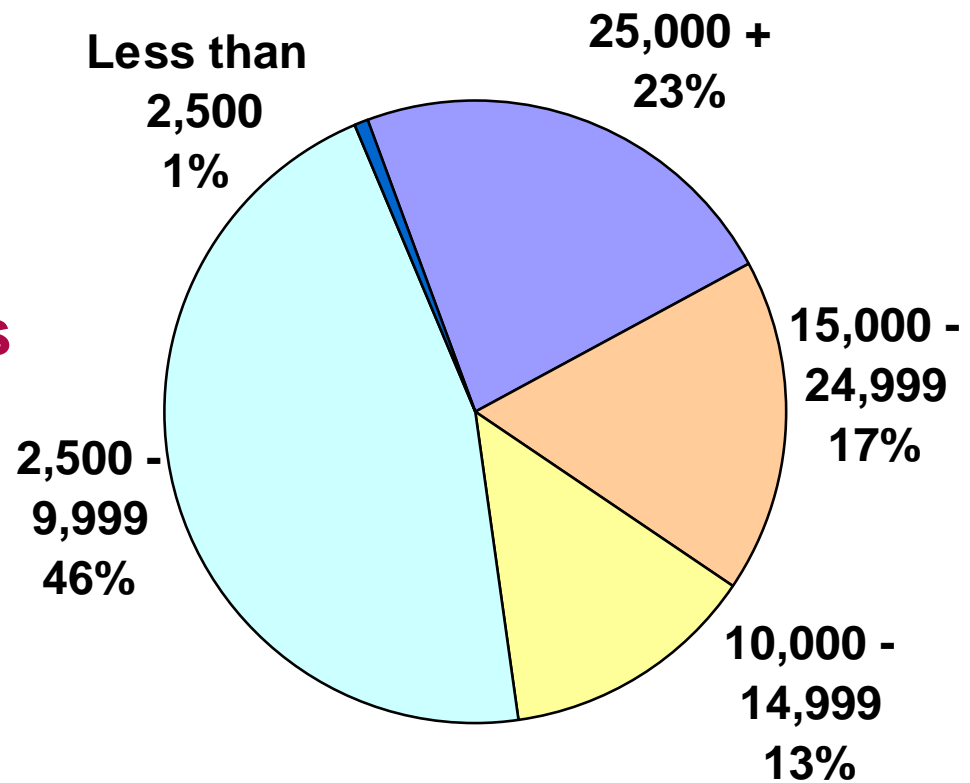


Participants by District Size

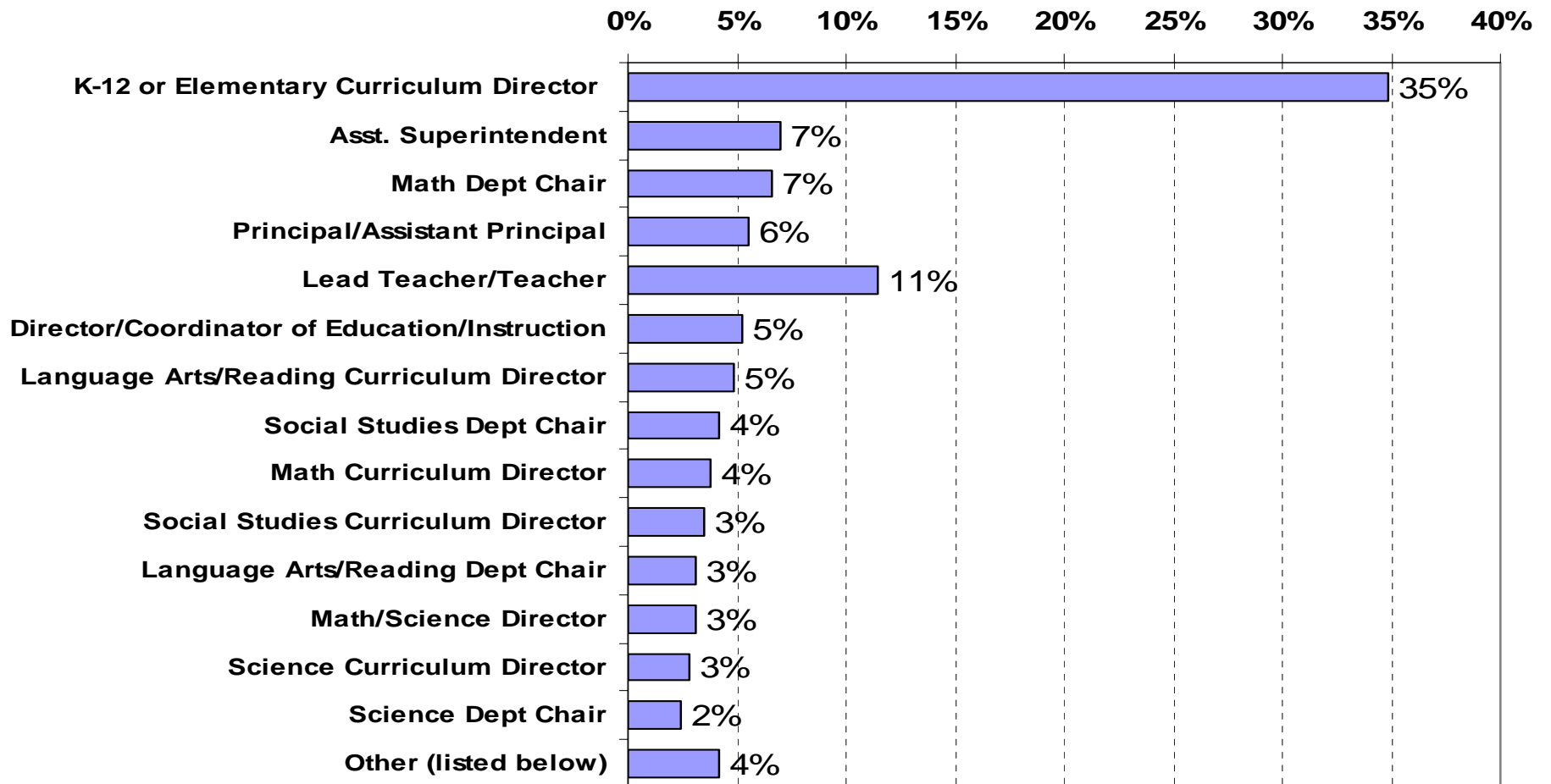
53% > 10,000 students

46% < 10,000 students

1% < 2,500 students



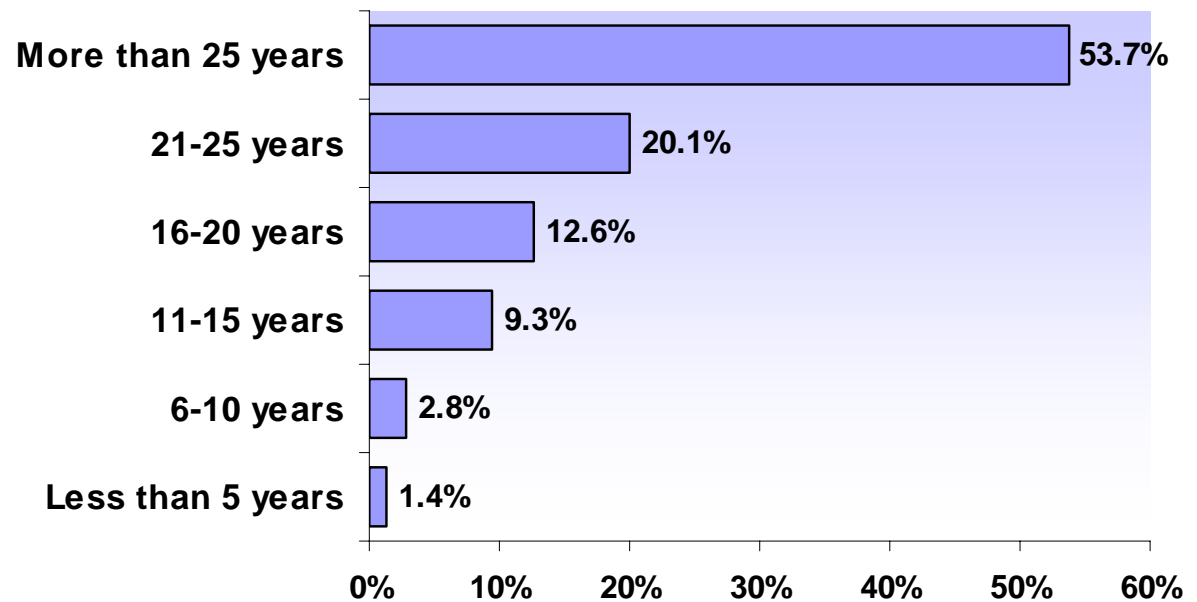
Participants by Job Title



Experience

- 74% had more than 20 years experience
- 28% were currently teaching

Years in Education



Supplemental Instructional Materials

Supplemental materials are defined as non-basal educational materials (everything other than textbooks) that support a comprehensive curriculum.

They can be used by students at home or in school, created in any media, and be developed for any age learner.

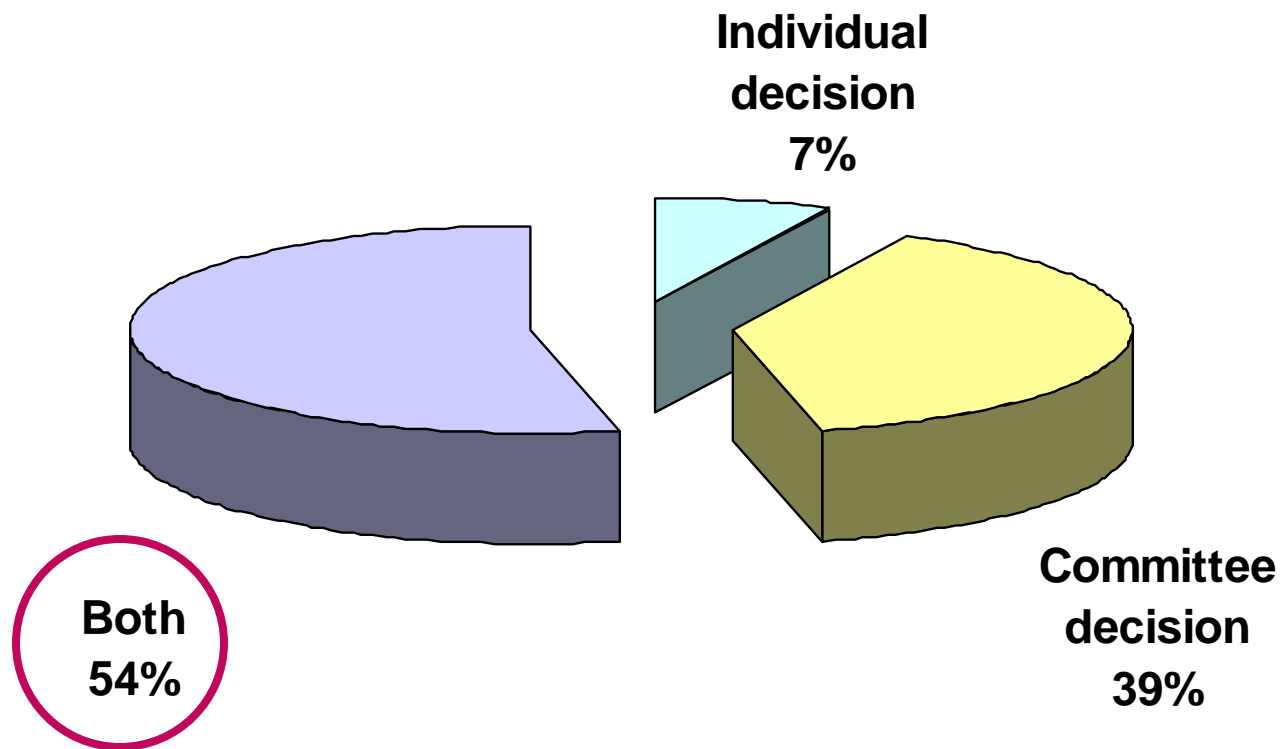


Decision Making

Q. Is the review, evaluation and purchasing decision for supplemental materials in your district done by individuals or committees?

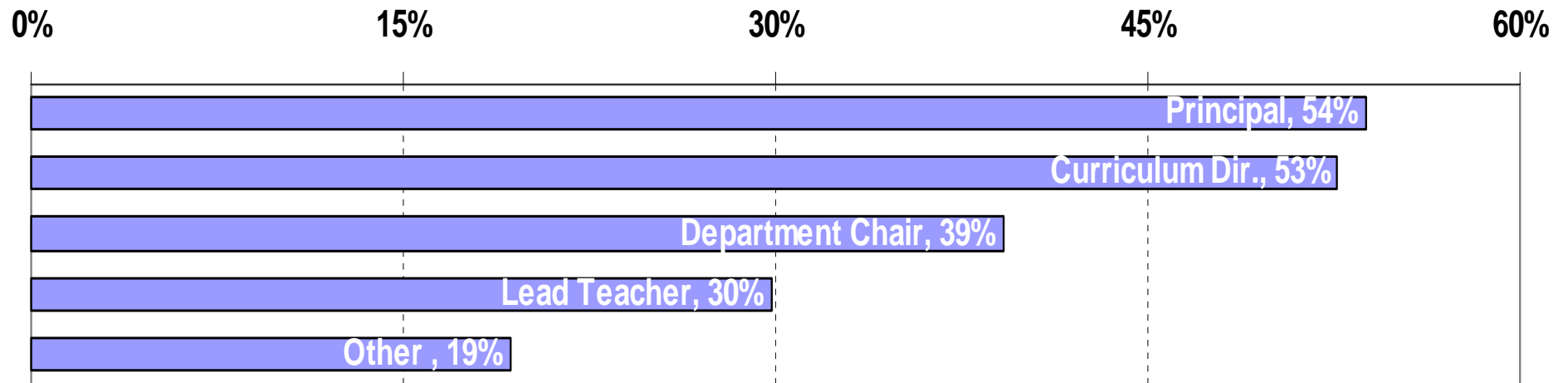
- Individuals
- Committee
- Both

Survey Said....



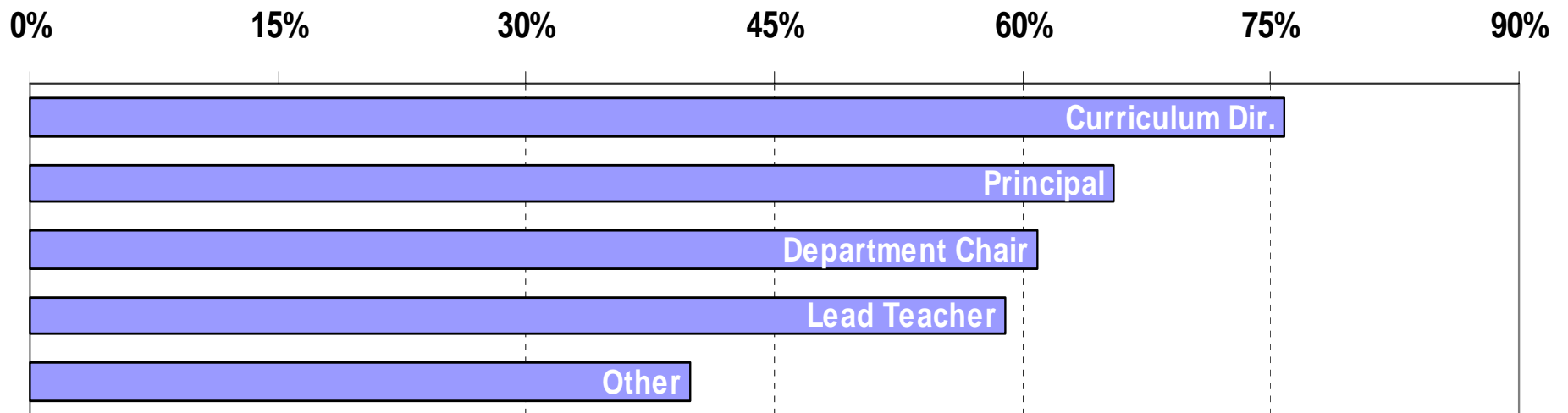
Decision Making

Individual Decision Makers



Decision Making

Committee Members



Other included teachers, parents, school representatives, librarians.



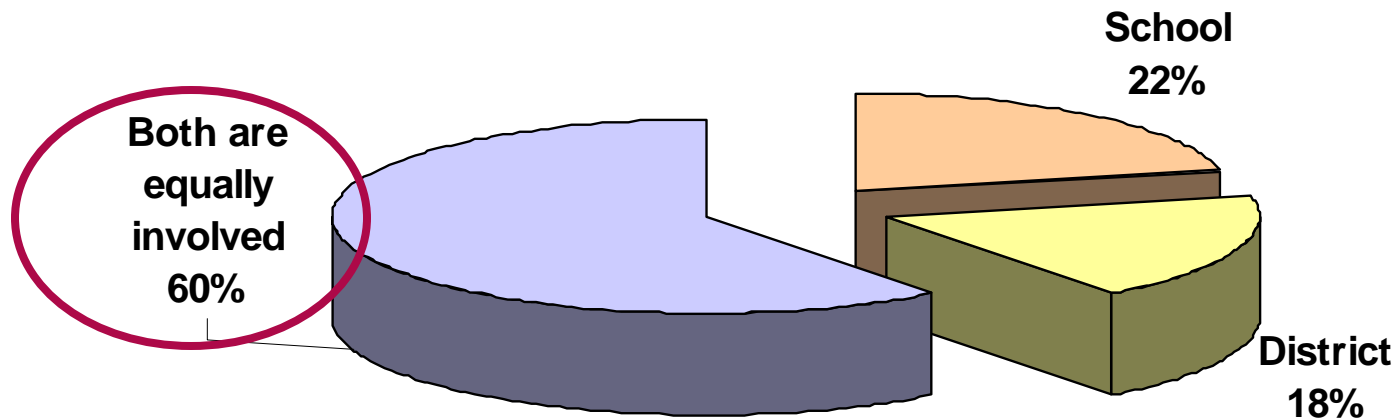
Decision Making

Q. Is the final decision about what supplemental materials will be purchased made at the district or school level?

- District**
- Building**
- Both are equally involved**

Survey Said...

Decision Making



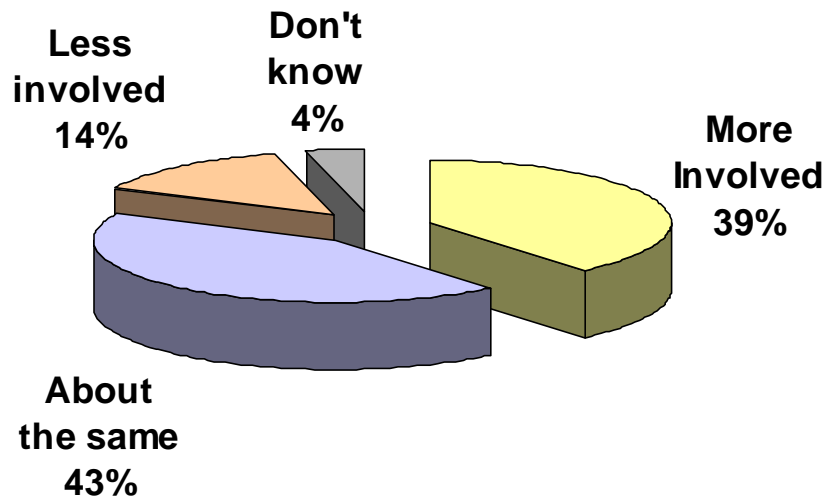
Decision Making

Q. In the past few years, has the district become more or less involved in the purchasing decision of supplemental materials?

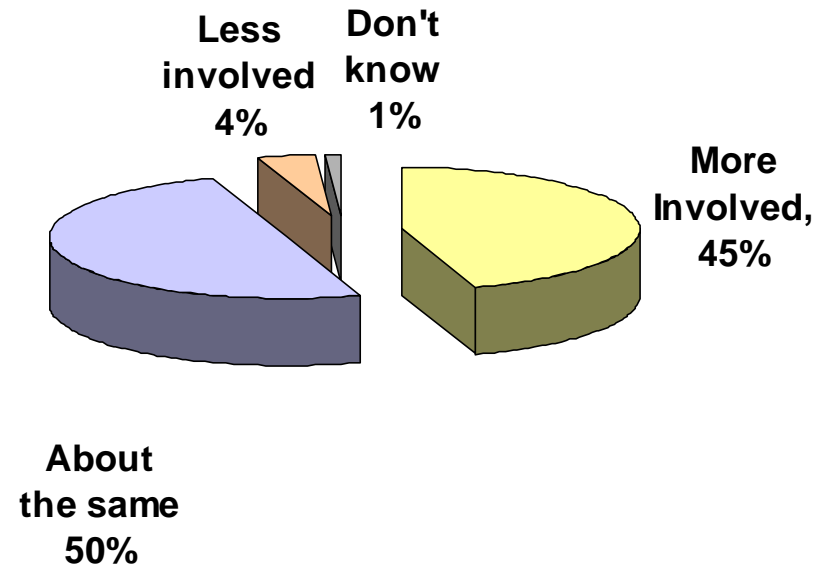
- More involved**
- Less involved**
- About the same**
- Don't know/not sure**

Survey Said

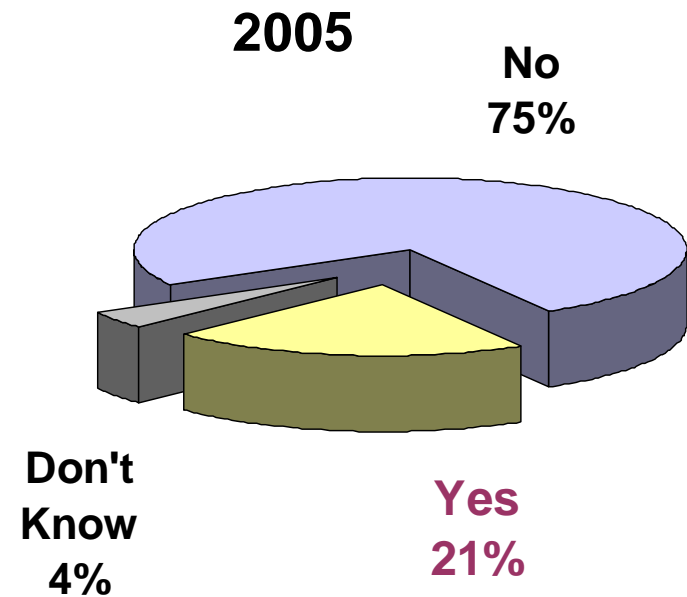
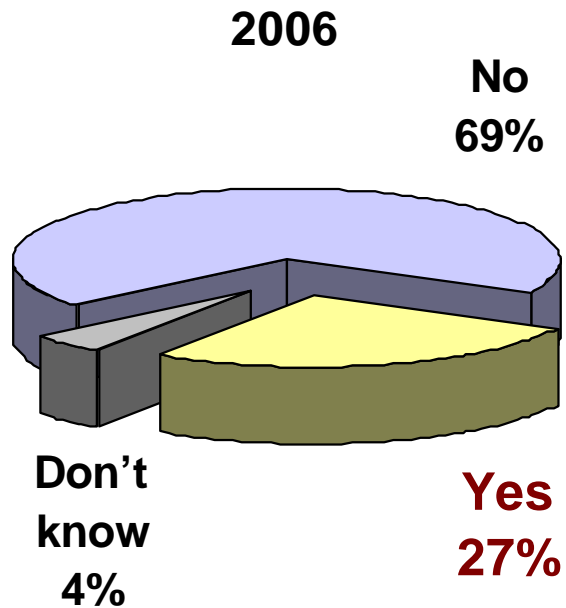
2006



2005



Requirement for Supplemental Materials on Approved Vendor Lists



Approved Vendor Lists

If yes, required by state or district?

Only district	24%
Only state	17%
Both	41%

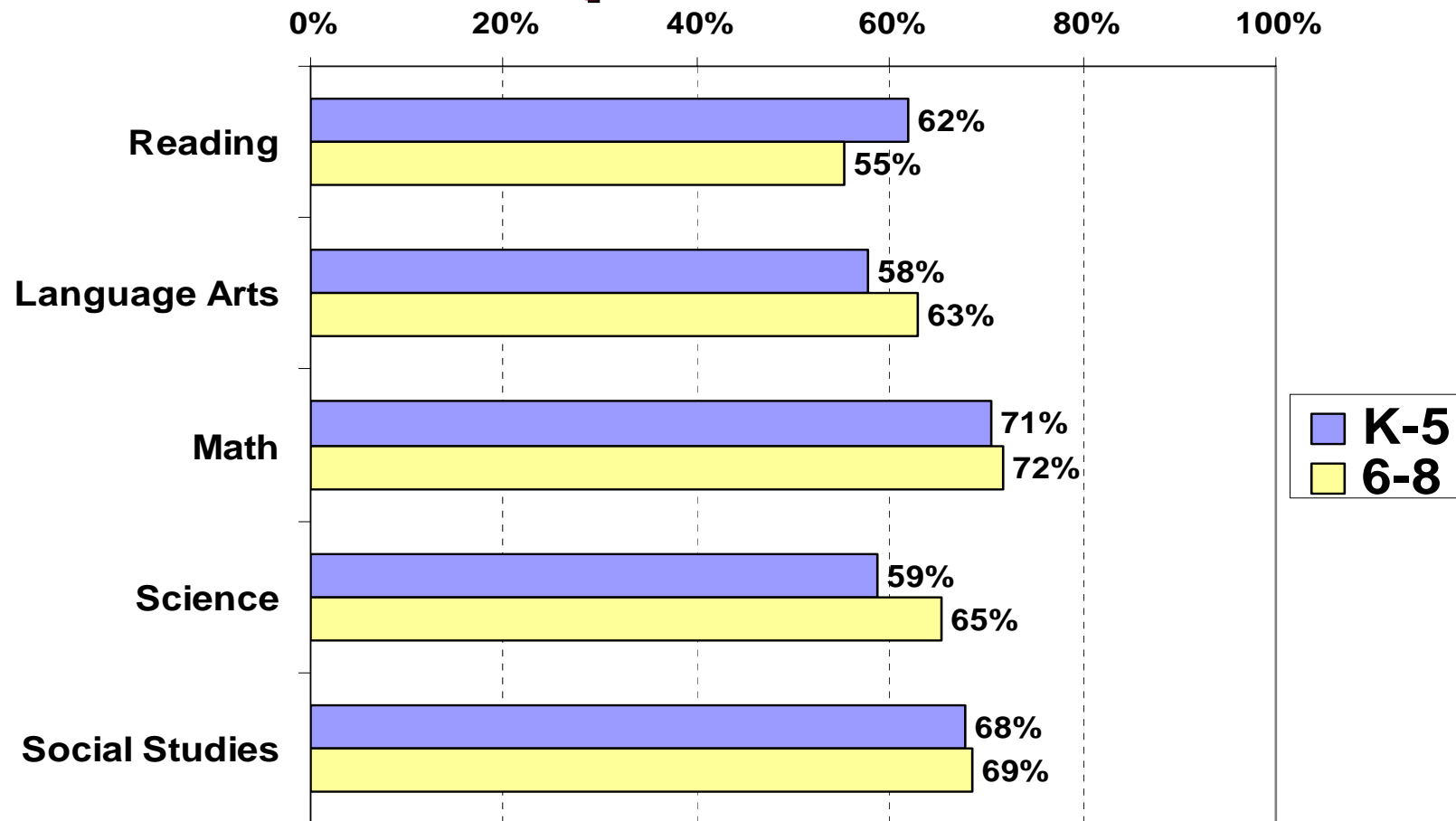
Majority Texas and California

Textbook Requirements

Q. Does your district currently require the use of a textbook in the following grade levels and curriculum areas?

	Reading	Language Arts	Math	Science	Social Studies
K-5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6-8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Textbooks Required

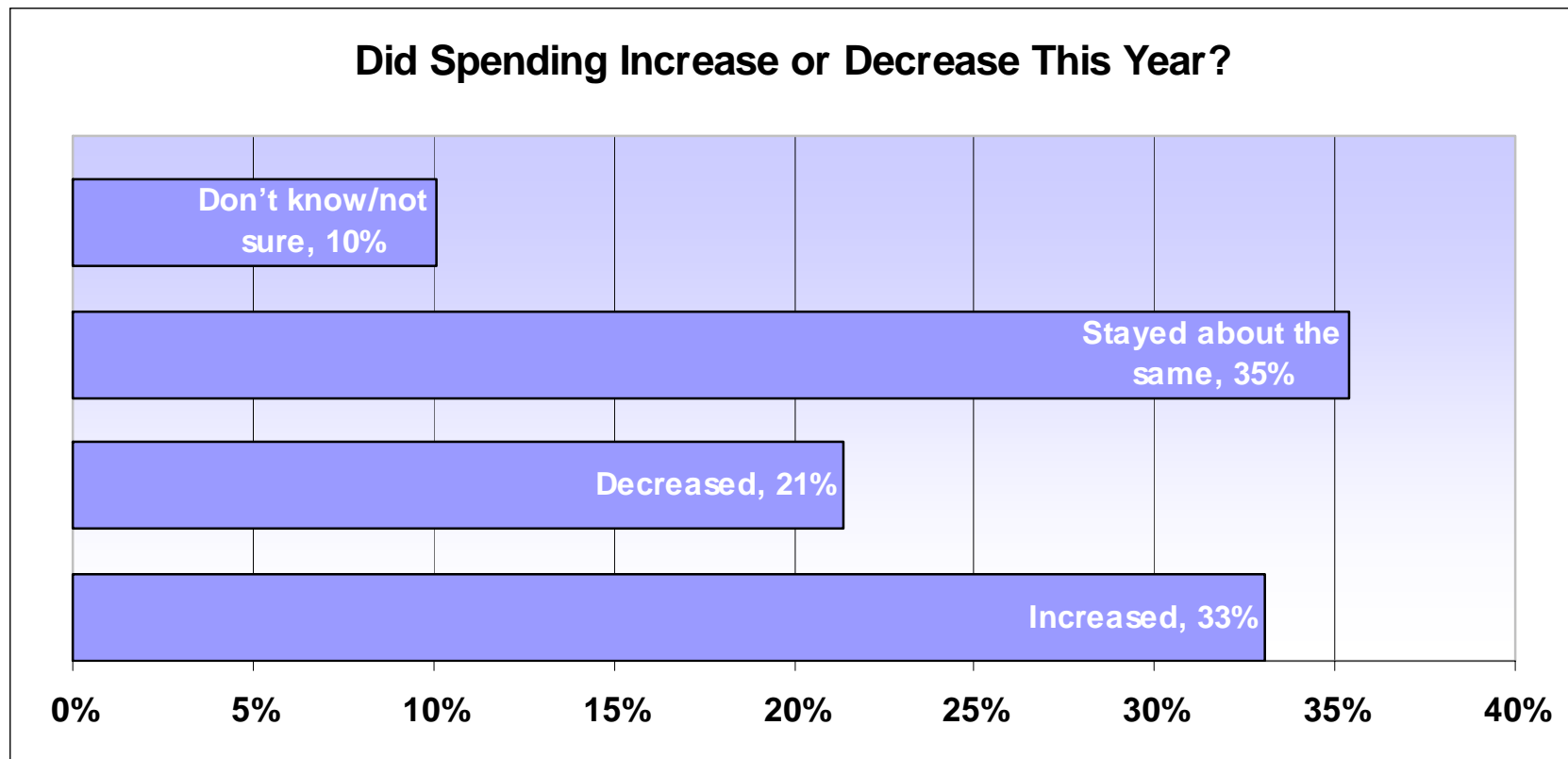


Slide reads: 62% of participants indicated that textbooks are required for reading in grades K-5

Use of Textbooks in Future

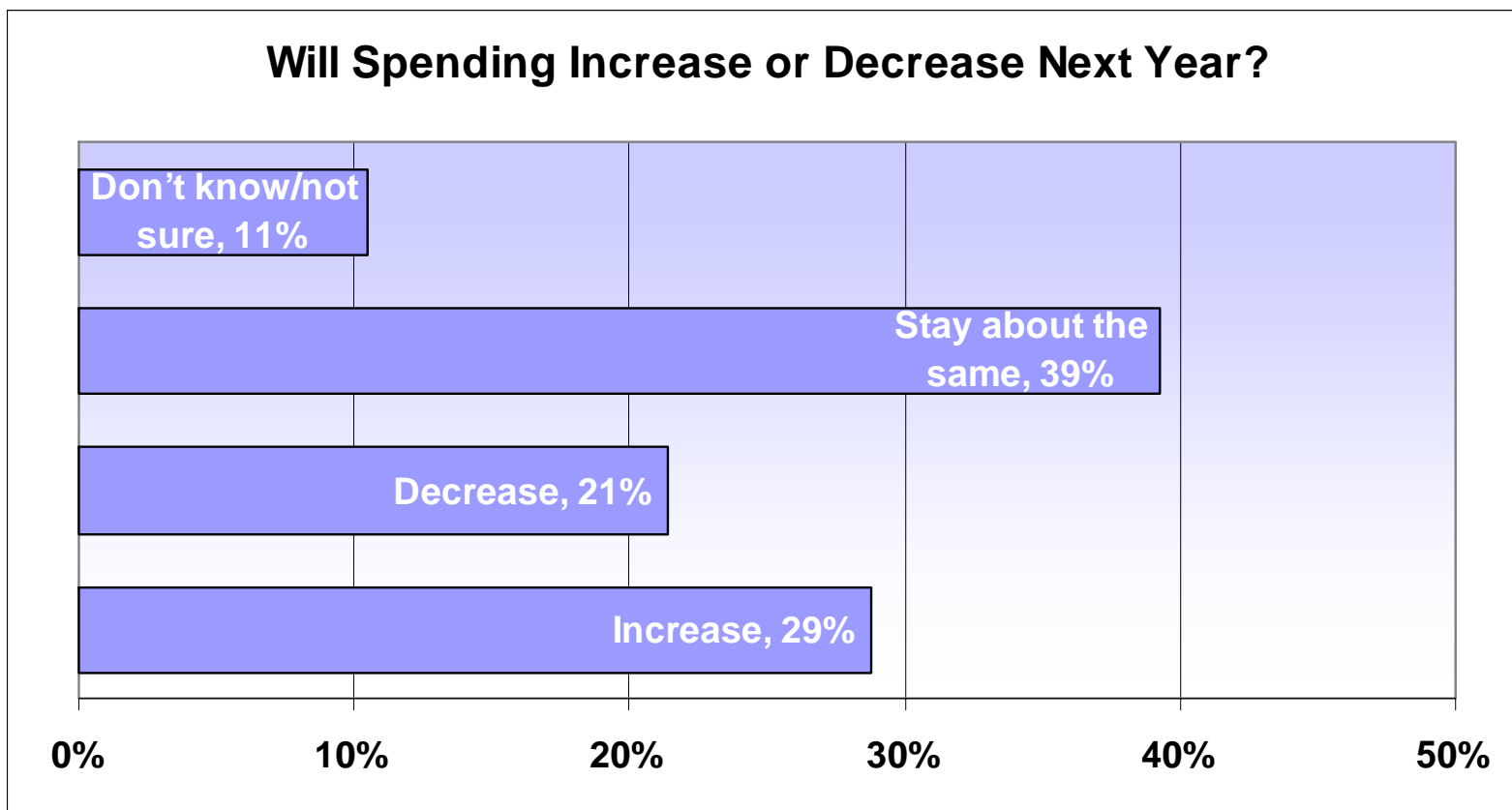
	Increase	Decrease	Stay the Same	Don't Know
Reading	15%	13%	60%	12%
Language Arts	12	14	62	12
Math	15	9	67	11
Science	11	18	59	13
Social Studies	11	14	62	14

Spending on Supplemental Materials



68% said spending stayed the same or increased this year.

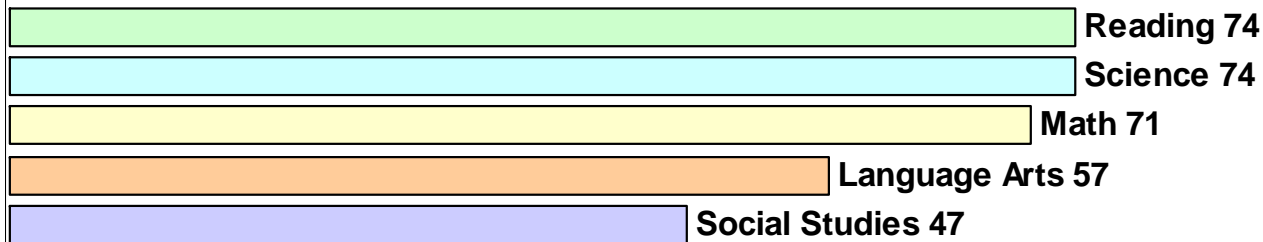
Spending on Supplemental Materials



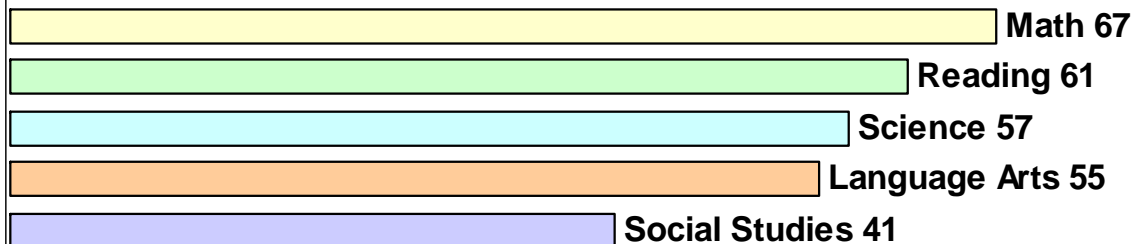
69% say spending will stay the same or increase next year.

District - Intent to Purchase

K-5 (top two rankings)



Grades 6 - 8 (top two rankings)





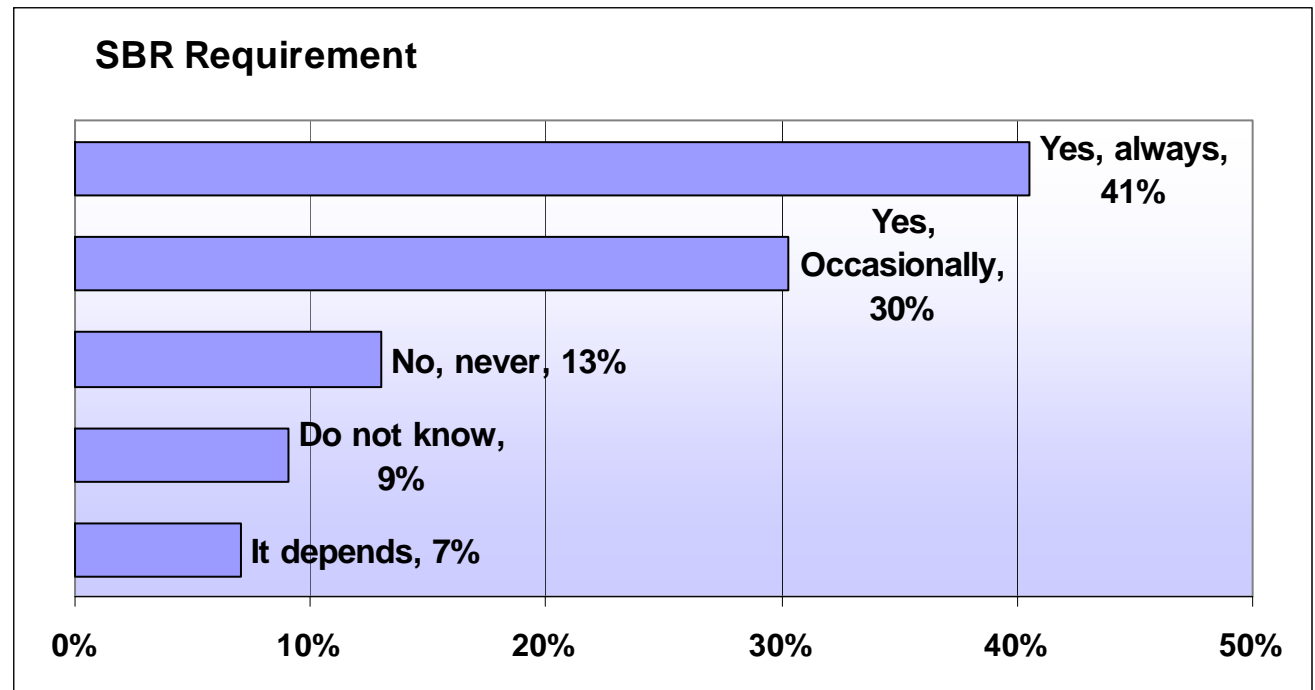
SBR Requirement

Q. Does your district require proof of scientifically based research before purchasing supplemental materials?

- Yes, always**
- Yes, occasionally**
- No, never**
- It depends**
- Don't know**

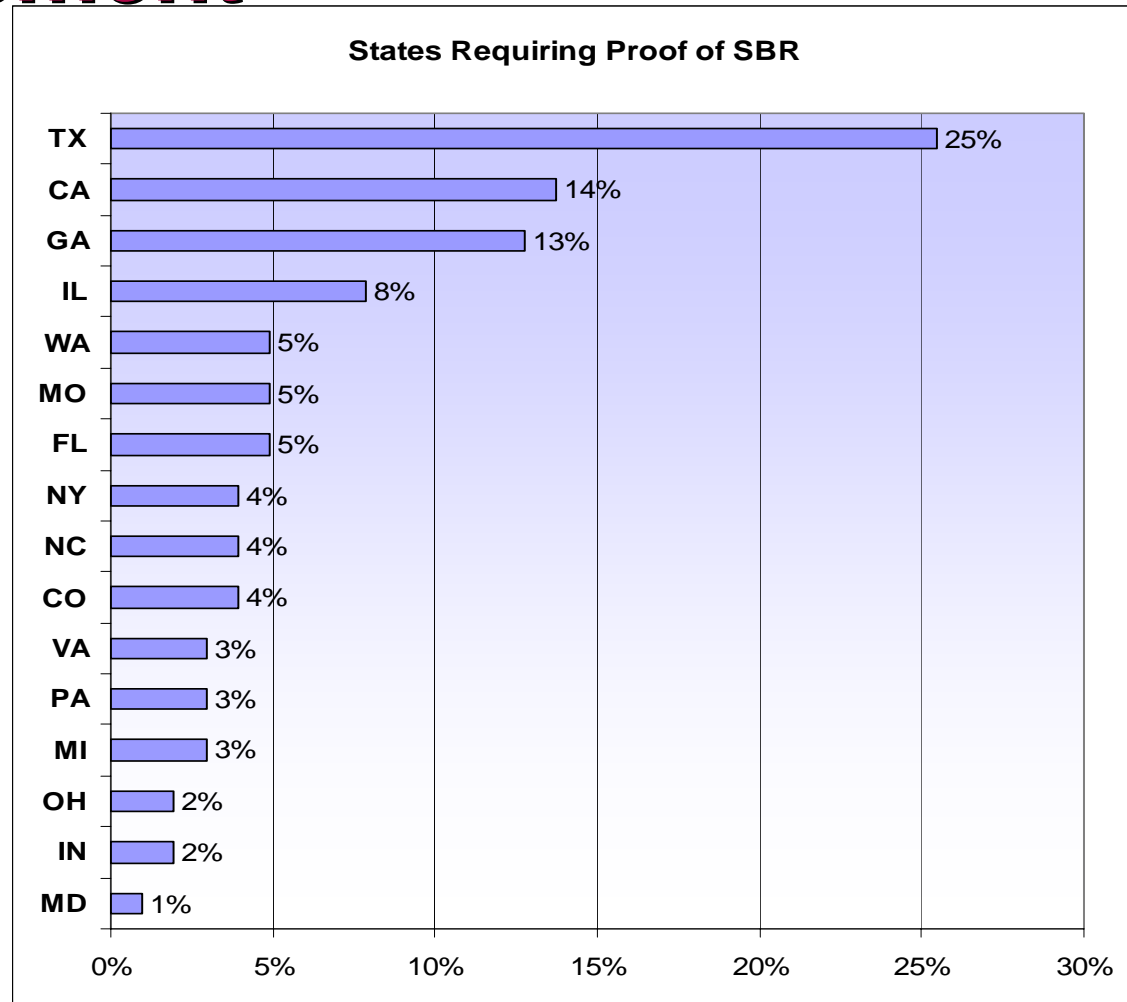
SBR Requirement...Survey Said Answer

- Yes, always
- Yes, occasionally
- No, never
- It depends
- Don't know



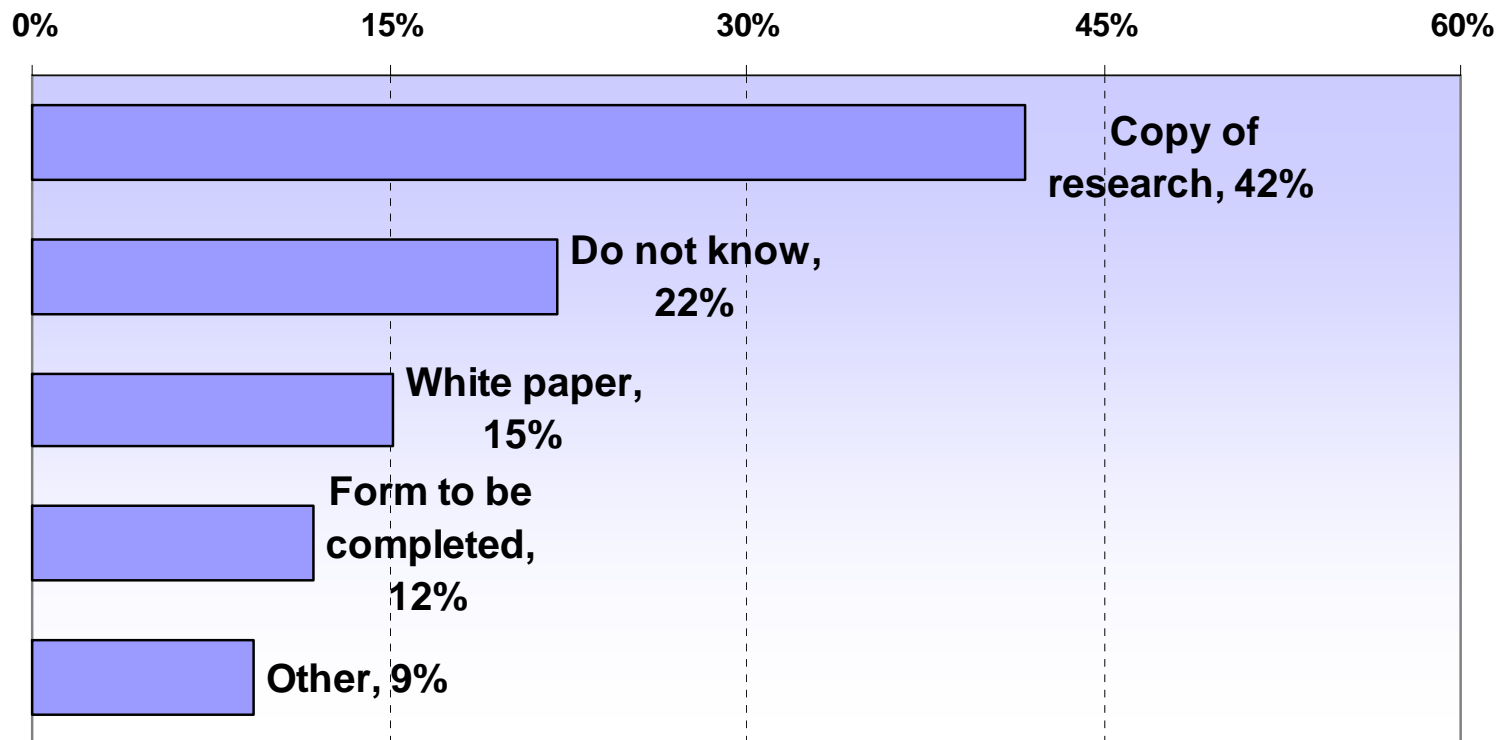
SBR Requirement

Of those who said
 “yes, always,”
 over 50% came from
 Texas
 California
 Georgia



SBR Requirement

Type of Proof Required for SBR



Q. For each grade level and subject area, please rank the top three formats in which you prefer to receive supplemental materials?

	Reading	Language Arts	Math	Science	Social Studies
K-5					
6-8					

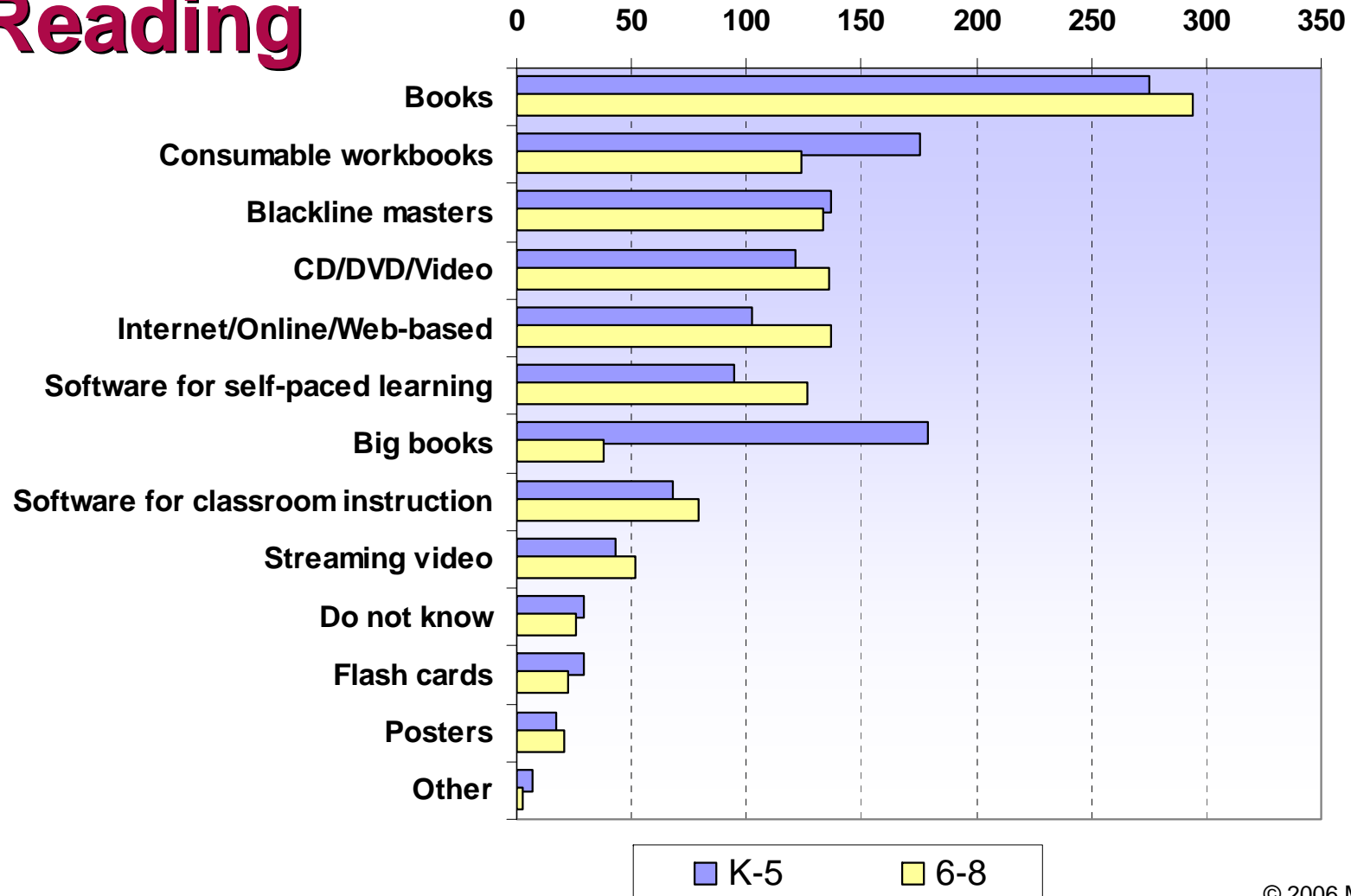
Formats

<ul style="list-style-type: none">• Books	<ul style="list-style-type: none">• CD/DVD/Video
<ul style="list-style-type: none">• Blackline masters	<ul style="list-style-type: none">• Streaming video
<ul style="list-style-type: none">• Consumable workbooks	<ul style="list-style-type: none">• Internet/Online/Web-based
<ul style="list-style-type: none">• Big books	<ul style="list-style-type: none">• Software for self-paced learning
<ul style="list-style-type: none">• Flash cards	<ul style="list-style-type: none">• Software for classroom instruction
<ul style="list-style-type: none">• Posters	<ul style="list-style-type: none">• Don't know

Reading – Top Four

Grades K-5	Grades 6-8
Books	Books
Big Books	Internet/Online/ Web-based
Consumable Workbooks	CD/DVD/Video
Blackline Masters	Blackline Masters

Reading

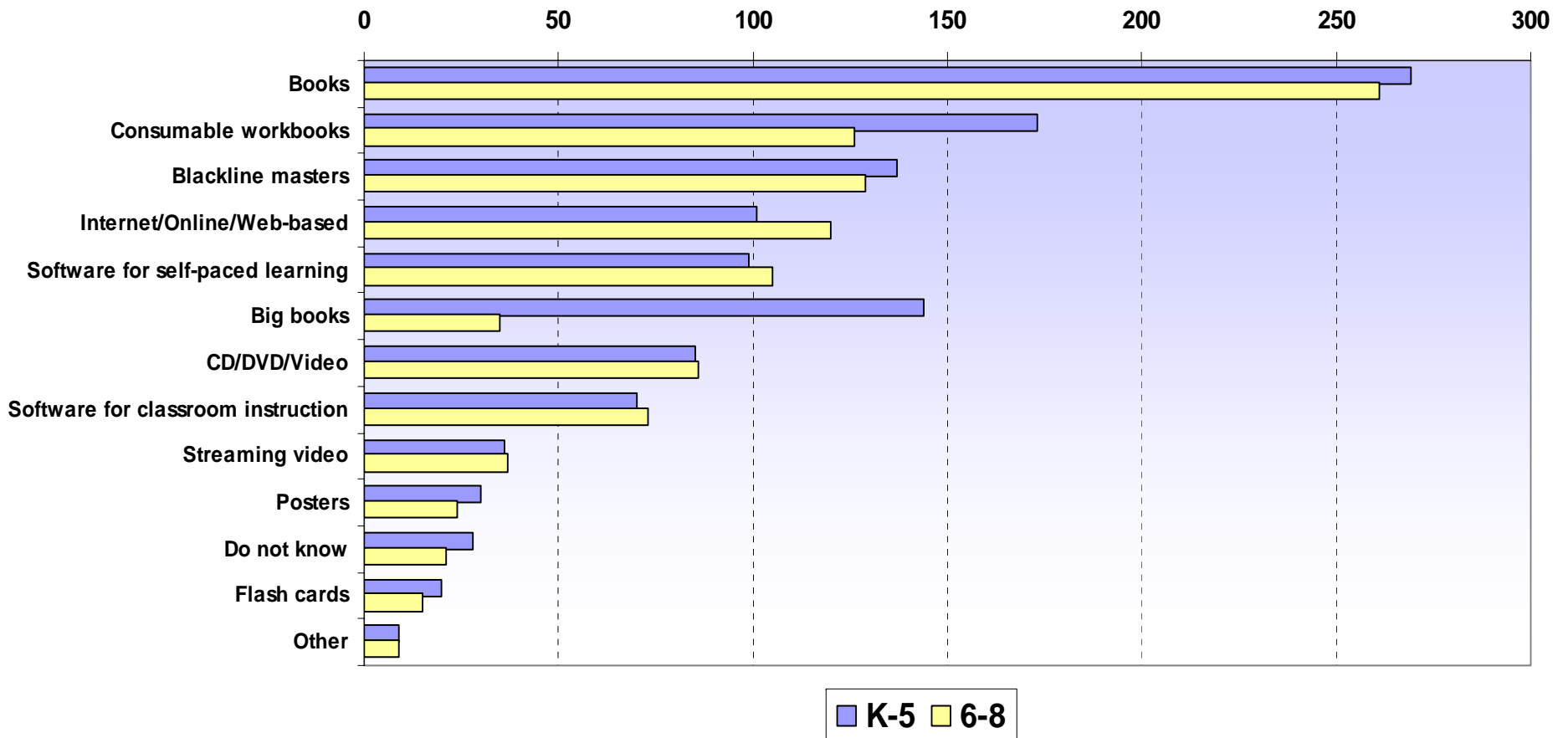


Language Arts – Top Four

Grades K-5
Books
Consumable Workbooks
Big Books
Blackline Masters

Grades 6-8
Books
Blackline masters
Consumable Workbooks
Internet/Online/ Web-based

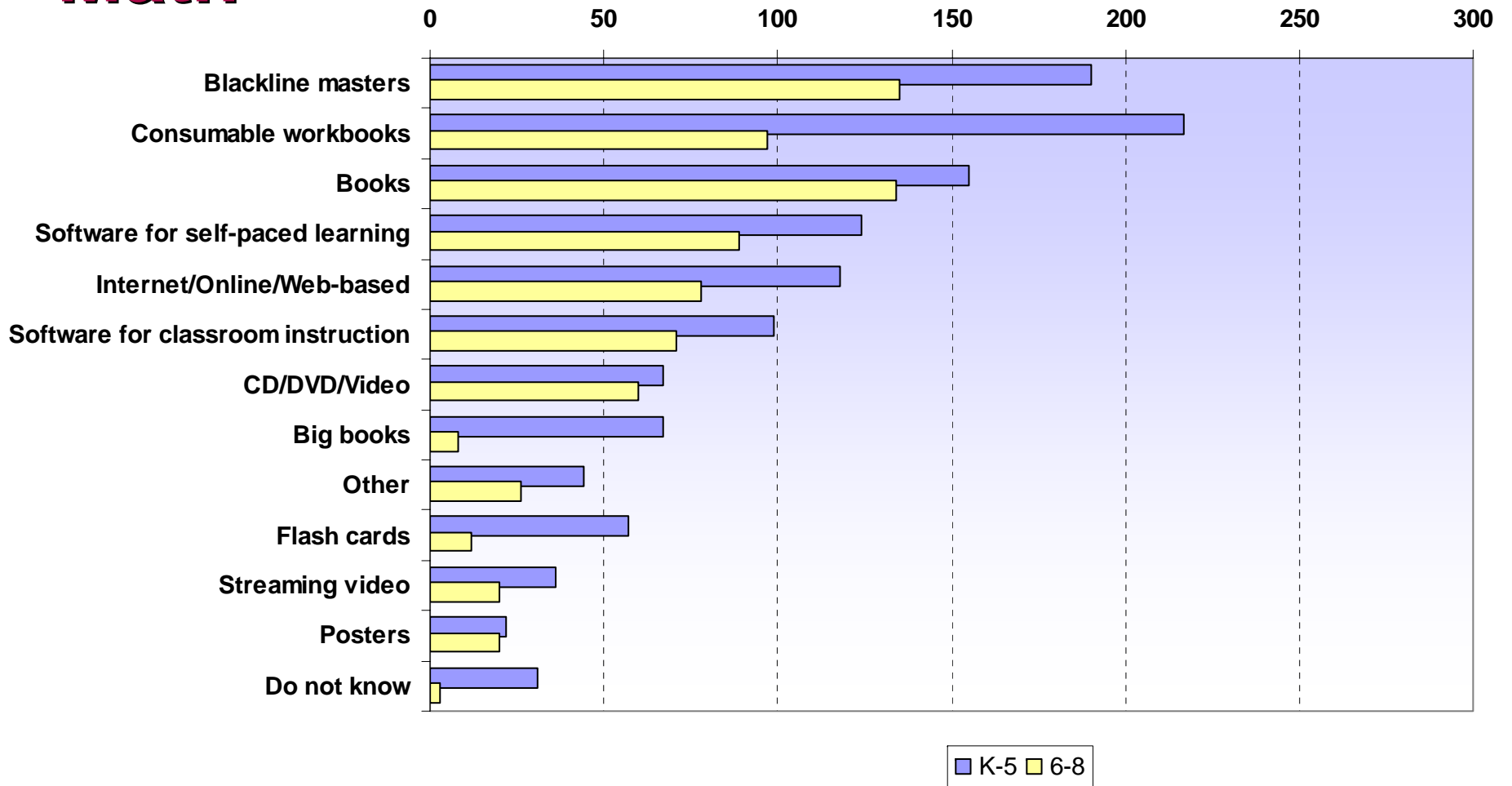
Language Arts



Math – Top Four

Grades K-5	Grades 6-8
Consumable Workbooks	Blackline Masters
Blackline masters	Books
Books	Consumable Workbooks
Software for self-paced learning	Software for self-paced learning

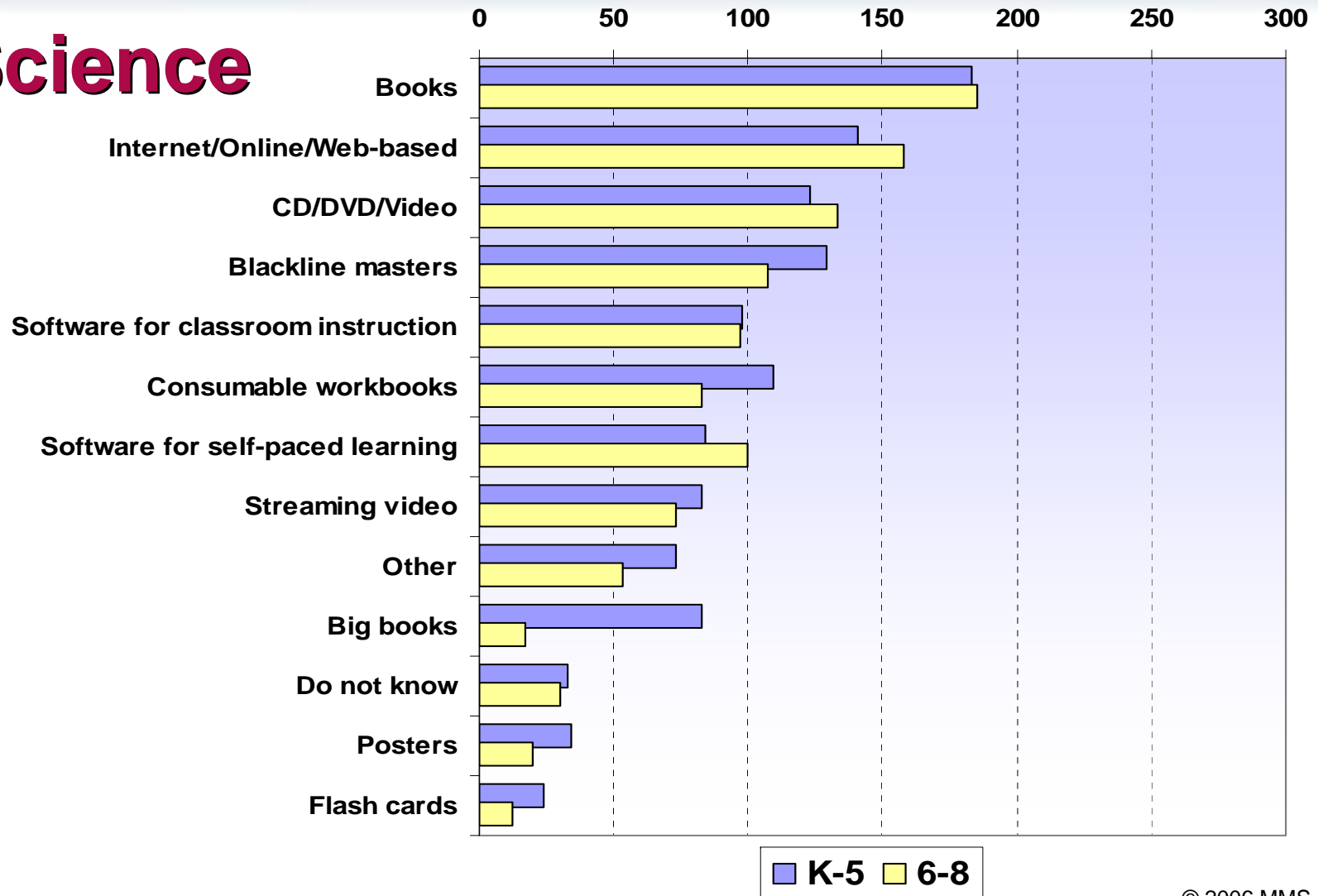
Math



Science – Top Four

Grades K-5	Grades 6-8
Books	Books
Internet/Online/Web	Internet/Online/Web
Blackline Masters	CD/DVD/Video
CD/DVD/Video	Blackline Masters

Science

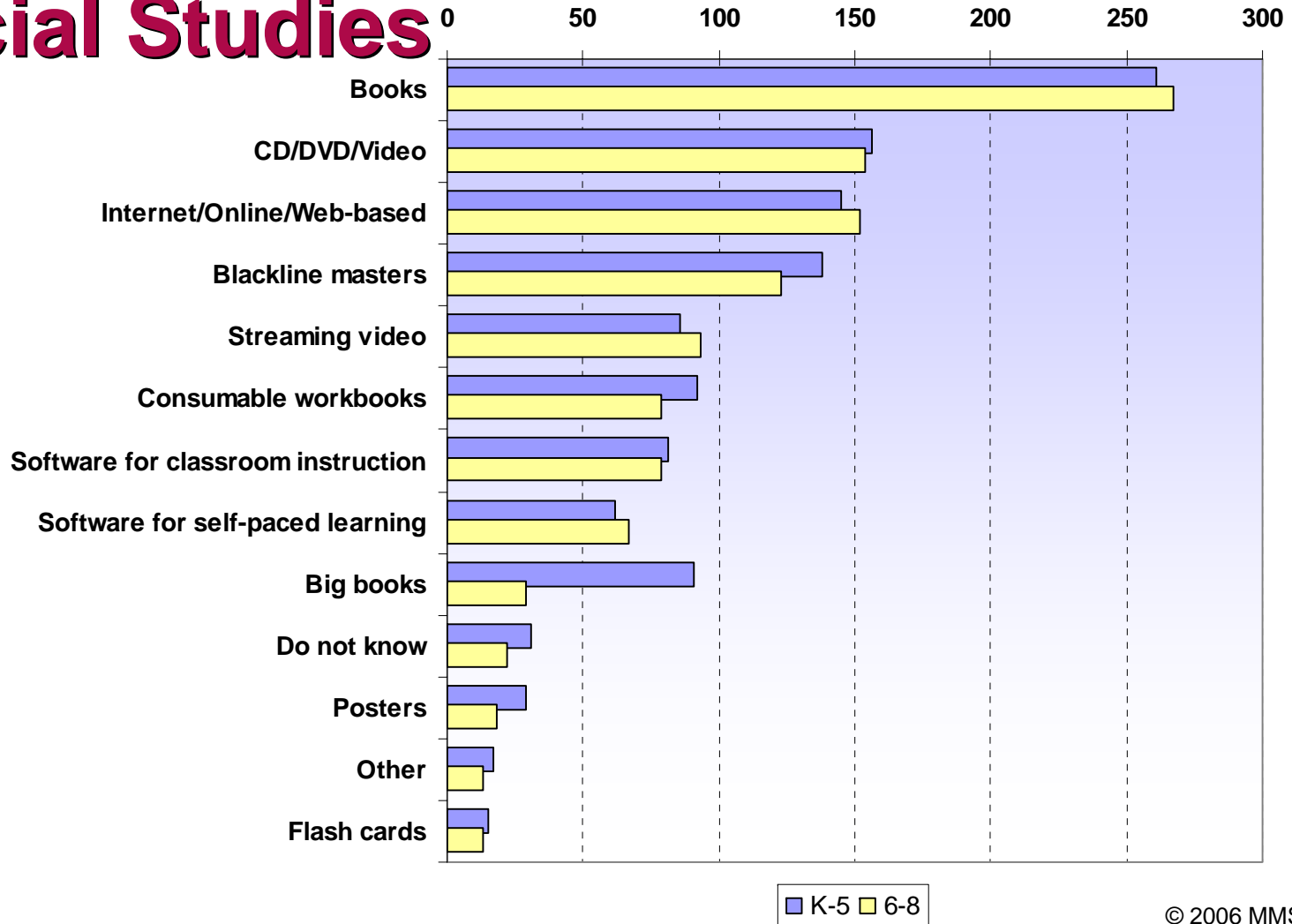


Social Studies – Top Four

Grades K-5
Books
CD/DVD/Video
Internet/Online/Web
Blackline Masters

Grades 6-8
Books
CD/DVD/Video
Internet/Online/Web
Blackline Masters

Social Studies





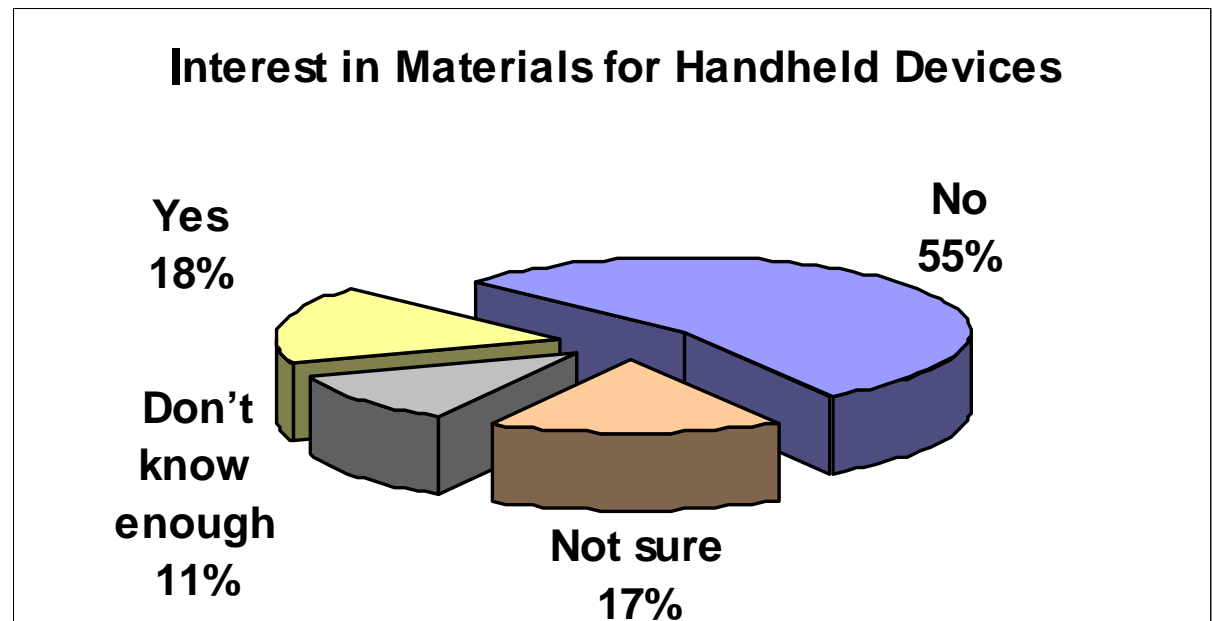
Content for Handhelds

Q. Are you interested in receiving supplemental instructional materials that could be delivered to a student's handheld device (iPod, PDA, cell phone)?

- Yes**
- No**
- Not sure**
- Don't know enough**

Survey Said...

- Yes
- No
- Not sure
- Don't know enough





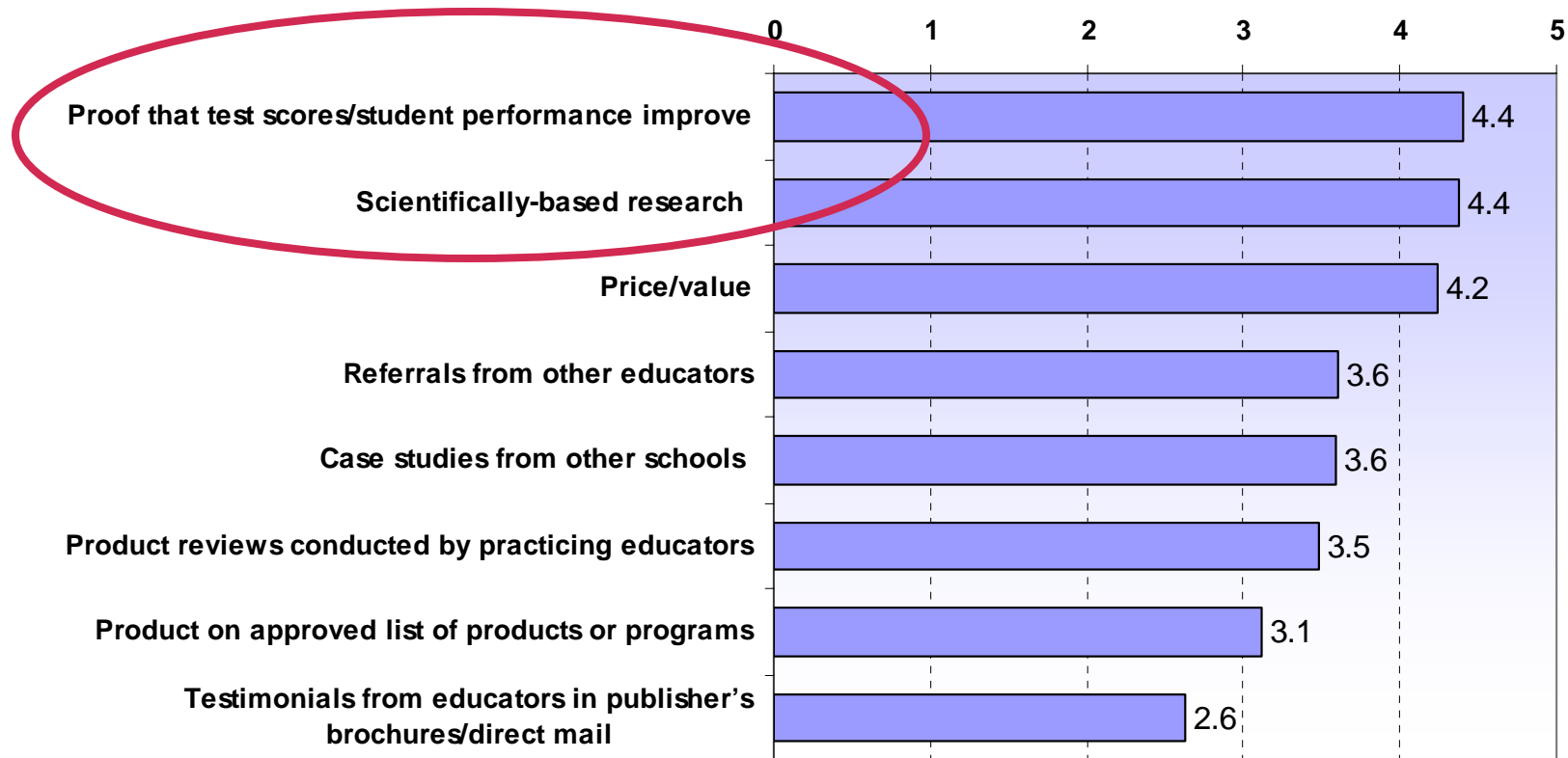
Q. How important are each of the following factors in deciding to purchase supplemental materials?

(Please rank on scale of 1 to 5; 5 = most important.)

- Price/value
- Referrals from other educators
- Product reviews conducted by practicing educators
- Case studies from other schools
- Product on approved list of products or programs
- Testimonials from educators in publisher's brochures/direct mail
- Proof that test scores or student performance will improve
- Scientifically based research

Survey Said...

Influential Factors on Purchase

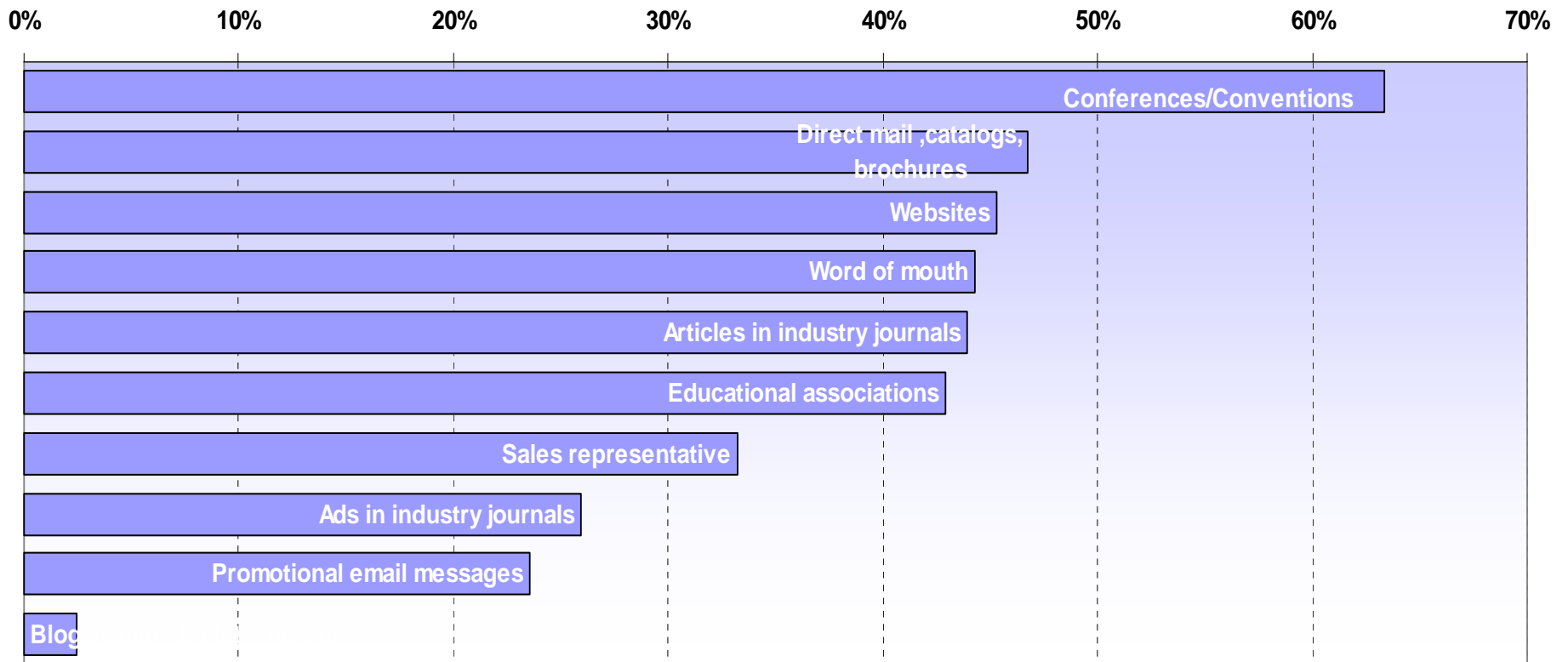


Learn About New Products

Q. How do you learn about new supplemental products? (Check all that apply)

- Articles in industry journals
- Ads in industry journals
- Conferences/conventions
- Websites
- Promotional email messages
- Sales representatives
- Direct mail (catalogs, brochures)
- Word of mouth
- Educational association
- Blogs/online bulletin boards

Learn About New Products



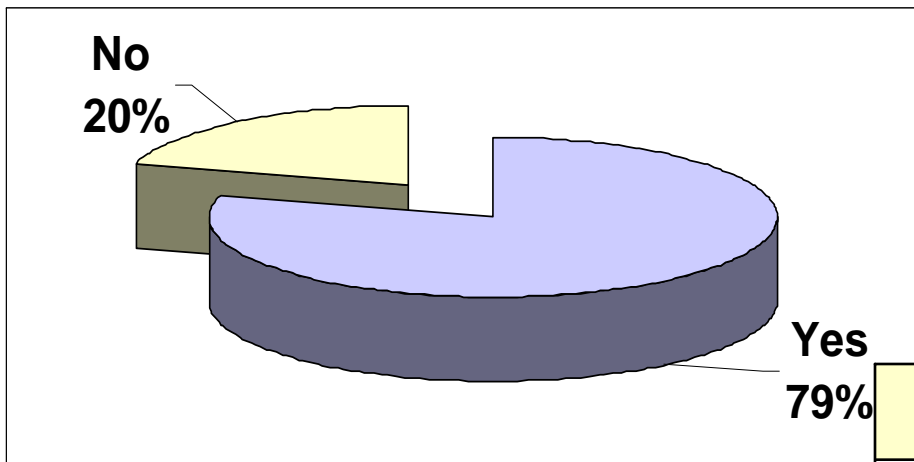
Visit Web Sites

Q. Do you visit the web sites of companies who provide supplemental materials?

If yes, how often?

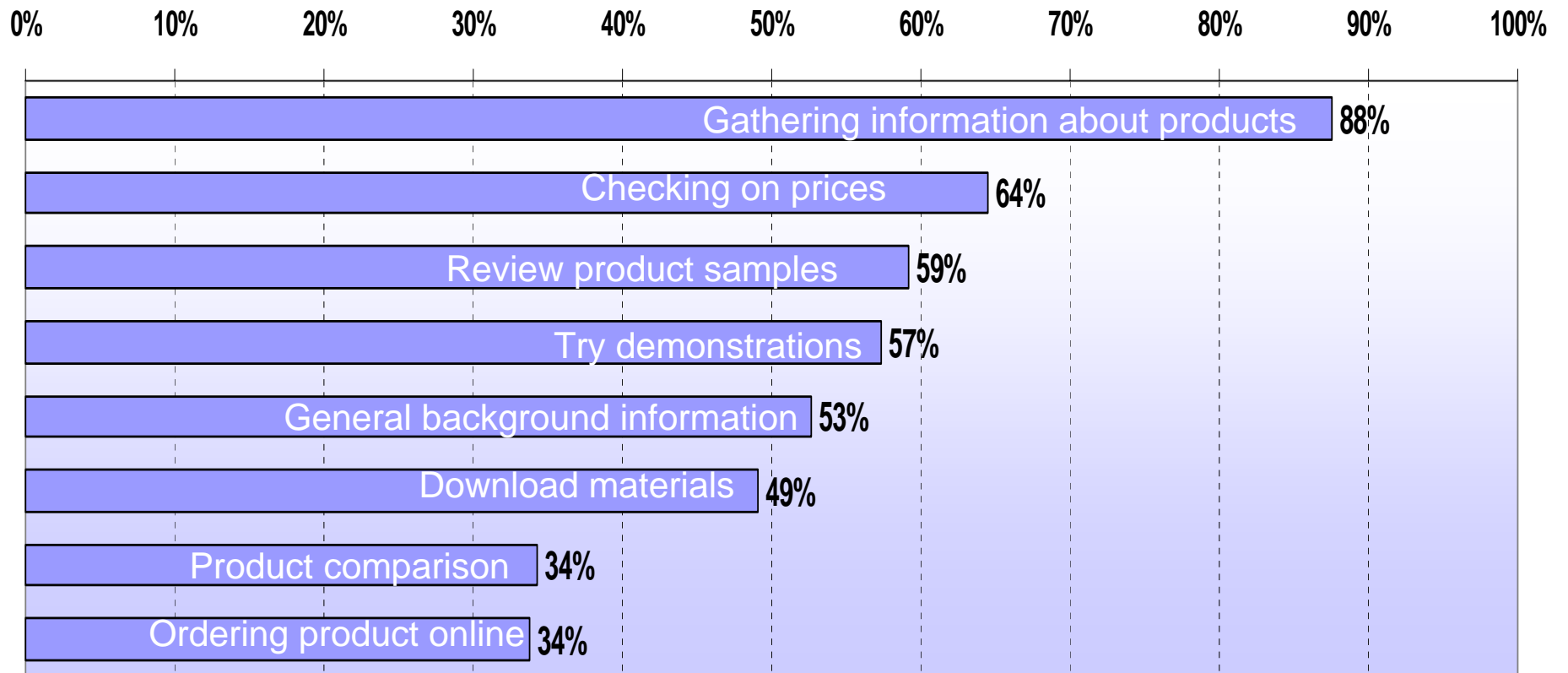
What is the primary purpose?

Visit Web Sites



Frequency	
1-2 times per month	40%
Less than once per month	32%
1-2 times per week	25%
Other (listed below)	4%

Purpose for Visiting Web Sites



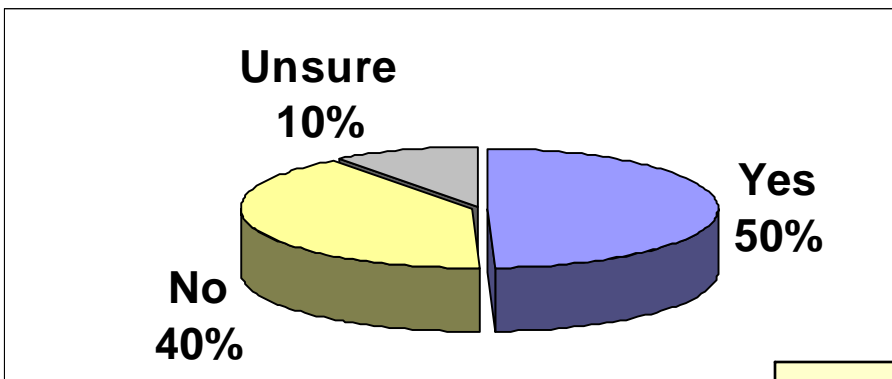
Order Online

Q. Does your school or district order supplemental materials online?

If yes, how often?

What do you order online?

Ordering Online



Frequency	
1-2 times a semester	79%
3-5 times a semester	14%
More than 5 times a semester	6%

Items Ordered Online	
Books	39%
Software	16%
DVDs/Videos	10%
Teaching guides/materials	9%
Workbooks	9%
Manipulatives	6%
Consumables	4%
Maps/Atlases	4%
Newspapers, magazines, weekly readers	4%
Posters	4%
Support materials for math and reading	4%
Test prep materials	4%
Free samples, trial materials	3%
Materials for targeted needs	3%
Remediation materials	3%
Testing/assessment materials	3%
Blackline masters	2%
Kits	2%

Q. What could supplemental publishers do better to help teachers in the classroom?

- **Align materials to specific curriculum standards or state standards**

“Our current sales rep for [company] has been reviewing and aligning our curriculum with the supplemental products that she has. We find it very useful for our teachers to learn how to incorporate the supplemental materials into their lesson plans.”

“We could use more products aligned with the state curriculum and standards.”

“It really has to have solid SBR behind it. I would love for a publisher to have a one- or two-day workshop to show teachers how their products could be applied to their state criteria and standards.”

- **Provide free materials for review**

“Provide free samples, with no strings attached, for review.”

“Provide high-quality materials at low, affordable prices.”

“Give teachers a trial period to try a product before committing to a purchase.”

“We are always interested in finding material that works for us and our students, but we cannot always tell if it is going to be beneficial until we try in in the classroom. If we are in doubt, we usually pass on a purchase order and elect to spend our dollars where we are certain it is to have an impact.”

- **Provide Teachers with Training or Online Support**

“Provide the inservice to accompany the supplemental books, free or at a nominal charge, otherwise materials won’t accomplish what the teachers expect they will.”

“Have immediate online support available.”

“Have website that are easy to navigate with e-mail or telephone support available.”

“Provide more effective professional development workshops.”

- **Easy to use, easy to understand, current**

“Teachers do not have the time to learn and/or prepare complex activities available through supplementary materials. Simplicity of use would be helpful.”

“Needs to be teacher friendly.”

“Needs to be ready to use with all the prep work done.”

“Keep materials current and coordinated with the curriculum”

- **Content**

- Differentiated instruction / leveled materials

“Have products at a variety of levels and abilities.”

- Web sites that are easy to navigate

“Difficult to find prices on web for supplemental materials. Be clear about what product does.”

- General

“Create more engaging materials with experiential activities that can be completed in one class period.”

“Provide more student-centered work and workbooks.”

“I think publishers do a good job with supplementals.”

“We have been very satisfied with our supplemental publishers.”

- **Marketing and Sales**

“Put product demonstrations online.”

“Make online material user friendly”

“Don’t send so many repetitive catalogs – it’s overwhelming.”

“Don’t be so pushy, just send the information.”

“Do a better job of helping teachers see where the materials can be helpful in filling the holes where children struggle.”

Predicting the Future

Q. Do you see any significant changes coming in the next three years in terms of the supplemental materials you will be using in the classroom?

- **Increase in use of technology and Internet-based supplemental materials**

“I hope that supplemental materials will be more readily available in a technological format. My students do not connect with workbooks. We need Internet/web-based activities and materials that I can use with projection equipment to captivate student interest.”

“I believe that textbooks are on the way out and that teachers will begin to rely upon technology and more concept-based instruction. This will foster a need for more supplemental materials that relate to real-world situations.”

“It will definitely be more technology-based.”

- **Decrease in textbooks, increase in supplemental materials**

“I see a greater need for hands-on supplements (more manipulatives).”

“We are trying to move away from workbooks and fill-in-the-blank workbooks. Want higher-level thinking.”

“Yes, moving away from traditional textbook instruction to more individualized instructions, more connections, more integrated lessons.”

“We are consistently moving toward supplemental texts to support learning and project-based learning with authentic assessment.”

- **More supplemental materials aligned with core curriculum standards**

“I believe that there will be more of a demand for publishers to align to the state standards.”

“Will be needing supplemental materials that provide a means of assessing or tracking students’ progress and that have compatibility with state testing formats.”

“Aligned more closely to state tests.”

- **More supplemental materials targeted to specific content areas**

“Math will be hot topic since students are not meeting standards.”

“Significant increase in English language learners. Need more materials.”

“We are not happy with our elementary math program. There will be no adoption for the next several years, we will probably rely heavily on supplemental materials for math until next adoption.”

Final Thoughts

“ Supplemental materials are very important because textbooks do not address our state curriculum to the depth and complexity that students need to pass our state test.

Teachers will definitely be looking “outside the book” for materials that relate to individual student needs and make connections to the real world.”

Questions and Answers?

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