

# School District Purchasing Priorities | 2024-25



February 2024

EdWeek  
Market Brief®

# Academic, Social-Emotional Pressures Persist

## | About This Report

A major funding stream is going away. A tangled assortment of needs have not.

*EdWeek Market Brief's* new special report, *School District Purchasing Priorities, 2024-25*, comes as school systems across the country prepare for an abrupt change in the financial landscape. Over the past four years, a total of \$190 billion has flowed into K-12 education through federal stimulus aid. That historic amount of money is set to expire after this year.

Districts have used that emergency funding to address an array of urgent needs coming out the pandemic, from promoting student and teacher well-being to investing in learning recovery to making improvements to school buildings.

This report, now in its third year, looks beyond the stimulus horizon. It examines district spending priorities for the next fiscal year, which will begin this summer and extend through next school year. Its findings are based on nationally representative surveys conducted of district and school leaders, as well as classroom teachers, by the EdWeek Research Center. It finds that core district demands for many of the products that districts have come to see as essential in the years immediately after the pandemic—social-emotional learning, supplemental math and English/language arts materials, and devices, in particular—have not gone away.

It is not difficult to see why. There's a lingering anxiety among district and school leaders and teachers about a host of challenges. For top-level administrators, there are worries about recruiting and retaining teachers. Among educators, there are concerns about students' mental health, and classroom discipline. And overall, there's a

conviction that the loss of federal stimulus aid will have a negative impact on academic recovery.

One takeaway for education companies is that while the need for targeted products and services is evolving, it absolutely persists. Vendors will be pitching their products in school systems that most likely have a lot less financial flexibility than they have over the past four years. District decision-makers will have to be shown—through feedback from teachers, student achievement gains, and other formal and informal measures—that products produce results.

This report also sheds light on other, specific district appetites. It looks at what kinds of technology school systems want to scale back. And for the first time, it examines what K-12 officials want from artificial intelligence-powered products.

The special reports that *EdWeek Market Brief* produces—like all of our editorial coverage—are iterative. We report and collect survey data and present it, and the feedback we hear from our audience helps us refine what comes next. Let us know how our research meshes with your organization's experiences in the K-12 market, and what you're watching out for over the next year.

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# Table Of Contents

About This Report	2
Executive Summary	4
Key Context and Challenges	5
District Priorities and Pain Points	11
Spending by Product Category	24
Buying Processes and Funding Streams	40
Key Contributors	53
About <i>EdWeek Market Brief</i>	54

## Executive Summary

- While there are undoubtedly worries about a federal “funding cliff,” a substantial portion of stimulus-supported projects will be preserved to some degree. Forty-three percent of K-12 leaders surveyed say they will be **eliminating or significantly scaling back no more than one-quarter of the programs/projects** funded at least in part with stimulus aid. (Page 44)
- **Social-emotional learning remains a fairly strong spending priority** for district leaders. Forty-seven percent of those surveyed project spending more on SEL next fiscal year than they do in the current year. That’s a decline from last year, but it still makes SEL a top category of need in the report. (Page 25)
- Districts **will continue to invest heavily in devices**, despite ongoing efforts in some school systems to scale back the influence of technology as pandemic-era remote learning recedes further from view. Forty-eight percent of district leaders project spending more on devices next fiscal year—presumably either on new purchases, or replenishing existing tools—roughly the same as the current year. (Page 26)
- In a likely sign of school districts’ continued interest in learning recovery, **projected spending on elementary curriculum in math and English/language arts will remain fairly strong** over the coming year. At least 3 in 10 district leaders indicate spending on supplemental and core curriculum in both respective subjects will climb over the coming year. (Page 29, 31)
- **Spending on diversity, equity, and inclusion-focused resources is projected to fall sharply**, with just 24 percent of district administrators predicting spending will rise next fiscal year, compared to 38 percent during the current year. The dropoff could reflect the effect of a wave of policies approved by Republican state lawmakers over the past three years focused on restricting lessons about racism and gender. (Page 25)
- Nearly 7 in 10 district and school leaders say the **evaporation of federal stimulus aid will have a negative effect on academic outcomes**. Leaders in urban school systems are significantly more likely to believe the loss of emergency aid will have consequences. (Page 15)



- Districts are likely to **reduce spending in several areas that have seen big investments of stimulus funding**: social-emotional learning, summer learning, tutoring, professional development from external vendors, and device purchases, among them. This is NOT to say districts are deprioritizing these areas, overall—in fact, our report finds that projected spending in some of these categories will remain robust. But it appears to some scaling back is in coming. (Pages 46-50)
- District officials have **mixed sentiments about if there is too much or too little technology** in classrooms today. When asked what tech they would like to see reduced in schools, a substantial portion of district and school officials pointed to educational games and tech use in core academic math and English/language arts instruction. (Pages 16-19)
- For all of the interest in the potential of artificial intelligence in schools, many district and school leaders say the **inclusion of AI in a product—on its own—would not influence their decision to purchase a product**. If they were going to purchase an AI-powered product, K-12 officials said they want assurances that it was most important that teachers receive training to use it, and that it promote students’ critical thinking and have features to guard against student cheating. (Pages 20-23)

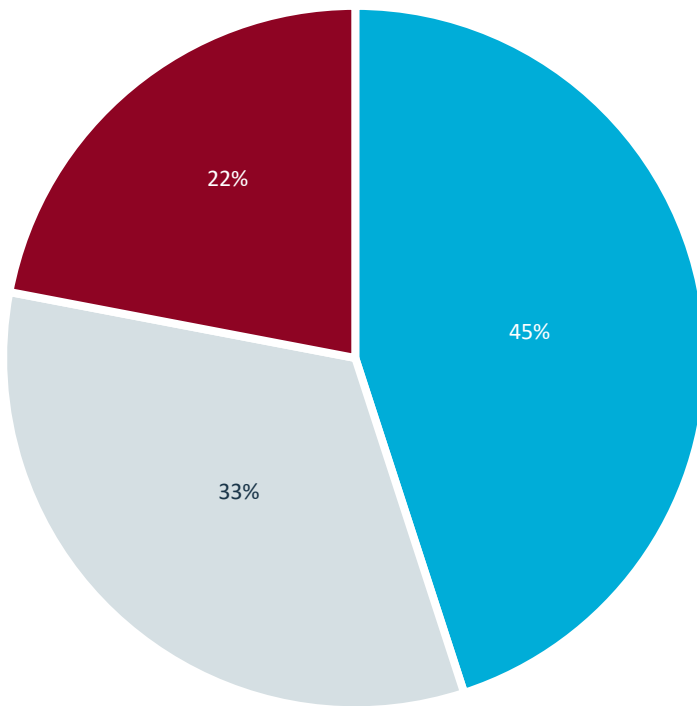
# Key Context And Challenges

KEY CONTEXT AND CHALLENGES

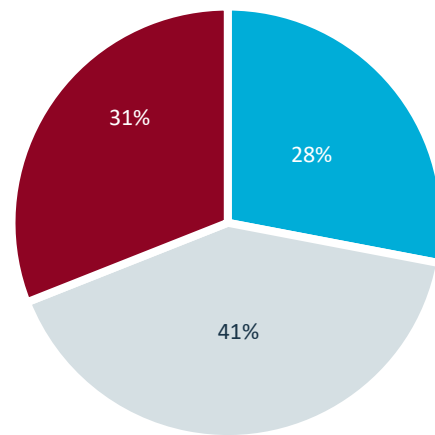
# Overall Optimism About Future Spending Has Risen

■ Increase    ■ No change    ■ Decrease

September/October 2023



January/February 2023



Totals may not add up to 100% due to rounding.

**INSIGHT:**

Overall nationwide economic conditions remain robust, and this may be propping up district officials' optimism about future spending. Despite the impending evaporation of federal stimulus dollars, school districts could benefit from other forces affecting funding, such as many governors' recent calls to increase spending on K-12 schools in this year's budgets.

**Survey Question:**

If I had a crystal ball, I would predict that in the next year spending in our school district will:

**Link to relevant story:**

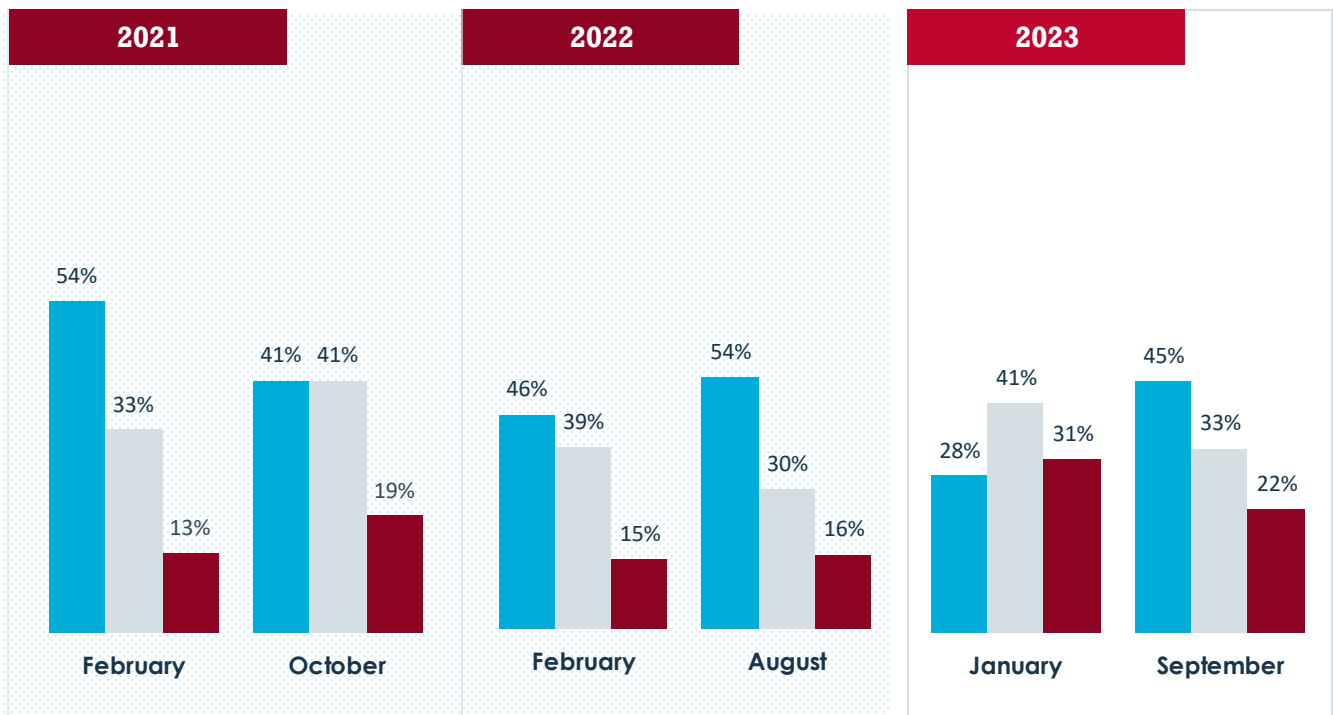
- <https://marketbrief.edweek.org/marketplace-k-12/education-companies-know-governors-k-12-agendas>

SOURCE: EdWeek Research Center nationally representative surveys of 254 district leaders in September/October of 2023 and 296 district leaders in January/February 2023.

KEY CONTEXT AND CHALLENGES

# How Has District Optimism/Pessimism About Spending Changed Over Time?

■ Increase    ■ No change    ■ Decrease



**INSIGHT:**

District optimism about spending conditions is relatively strong, when compared K-12 officials' views of their spending ability over the past three years. Optimism/pessimism about spending shifted greatly during the pandemic, mostly likely affected by factors such as the arrival of infusions of emergency federal aid and the condition of state budgets.

**Survey Question:**

If I had a crystal ball, I would predict that in the next year spending in our school district will:

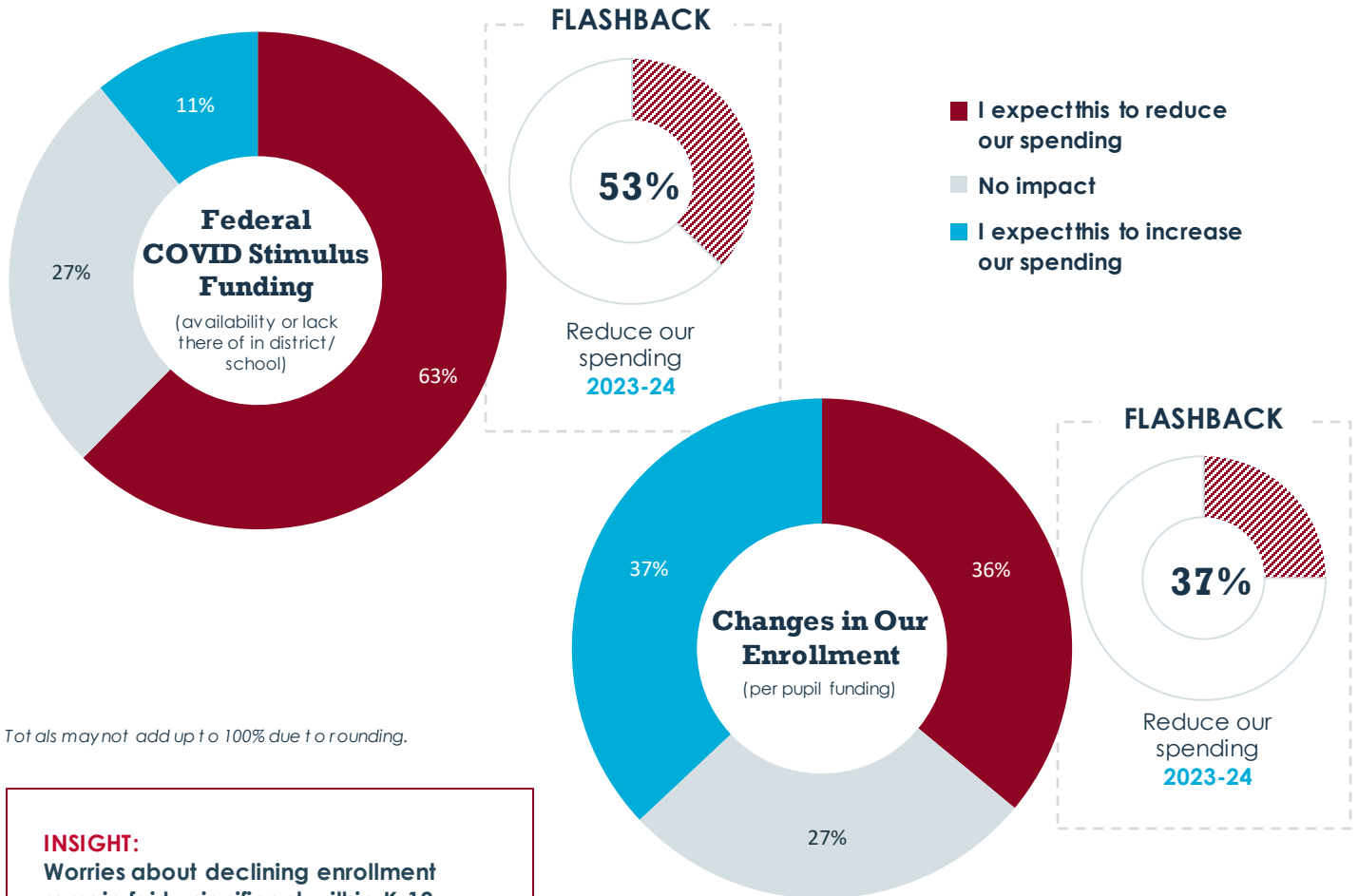
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/state-spending- poised-remain-strong-heres-means-k-12-education>

SOURCE: EdWeek Research Center nationally representative surveys of district leaders, 2021 -2023.

KEY CONTEXT AND CHALLENGES

# Worries About the Loss of Stimulus Money Rise Over Last Year; Enrollment Anxiety Remains Level



Tot als may not add up to 100% due to rounding.

**INSIGHT:**  
 Worries about declining enrollment remain fairly significant within K-12 systems, though EdWeek Market Brief's research shows that declines in student headcounts have varied enormously among states and districts. District concerns about the evaporation of \$190B in federal stimulus aid, meanwhile, have risen as the September 30, 2024 deadline to commit that money draws closer.

**Survey Question:**  
 How—if at all—do you expect the following financial considerations to impact your district's spending plans over the next two years?

**Link to relevant story:**  
 ■ <https://marketbrief.edweek.org/marketplace-k-12/university-researcher-predicts-bloodletting-federal-funding-cliff-hits>

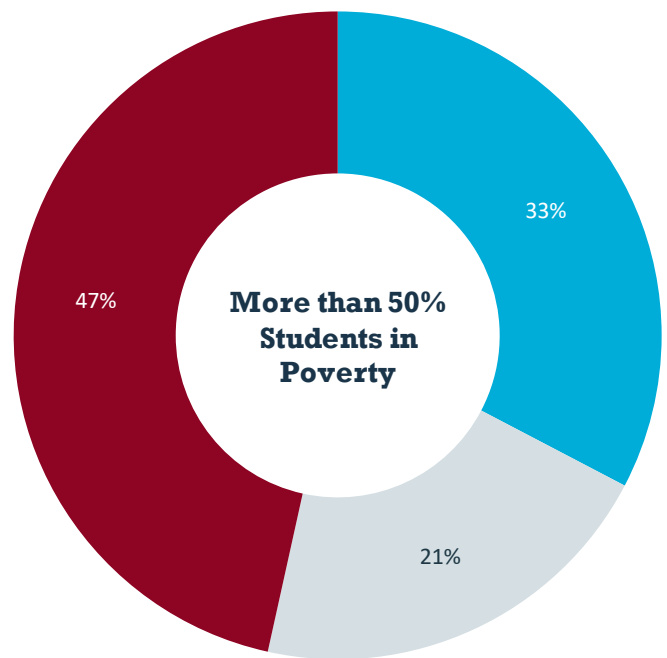
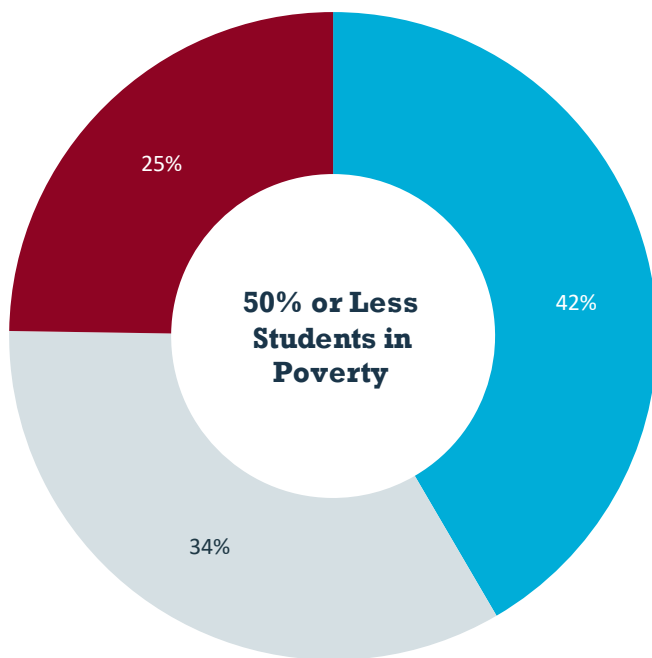
SOURCE: EdWeek Research Center July/August 2023 nationally representative survey of 161 district leaders and 125 school leaders.



KEY CONTEXT AND CHALLENGES

# Impoverished Districts Expect More Pain From Changes in Student Enrollment

How do you expect changes in our enrollment to affect your district's spending over the next two years?



■ I expect this to reduce our spending    ■ No impact    ■ I expect this to increase our spending

**INSIGHT:**

Leaders of high-poverty districts feel particular anxiety about what falling student numbers will mean for their finances. School systems to varying degrees rely on state aid that is tied to their student headcounts, and impoverished systems may have fewer ways to make up for losses of state funding.

**Survey Question:**

How—if at all—do you expect the following financial considerations to impact your district's spending plans over the next two years?

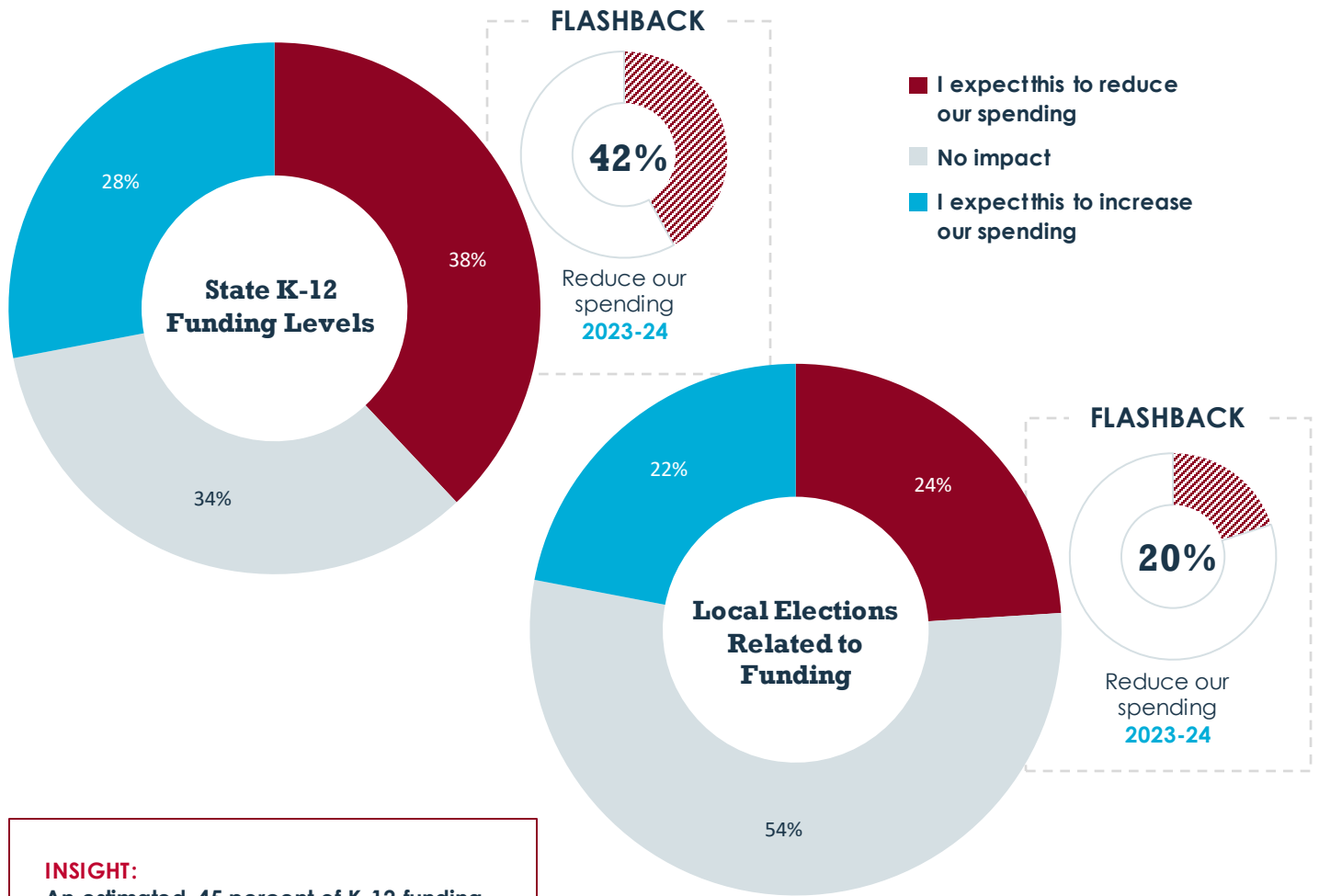
**Link to relevant story:**

- <https://marketbrief.edweek.org/analysts-view/expect-f-future-public-private-school-enrollment>

SOURCE: EdWeek Research Center July/August 2023 nationally representative survey of 161 district leaders and 125 school leaders.

KEY CONTEXT AND CHALLENGES

# Expectations for State and Local Funding Expectations Are Roughly Level



**INSIGHT:**  
 An estimated 45 percent of K-12 funding comes from the state level, according to the Peter G. Peterson Foundation. A recent report by the National Association of State Budget Officers found that overall state general fund spending is likely to grow by 6 percent over the next year. The survey finds that despite relatively positive conditions, districts remain relatively pessimistic about how much state funding will help them.

**Survey Question:**  
 How—if at all—do you expect the following financial considerations to impact your district’s spending plans over the next two years?

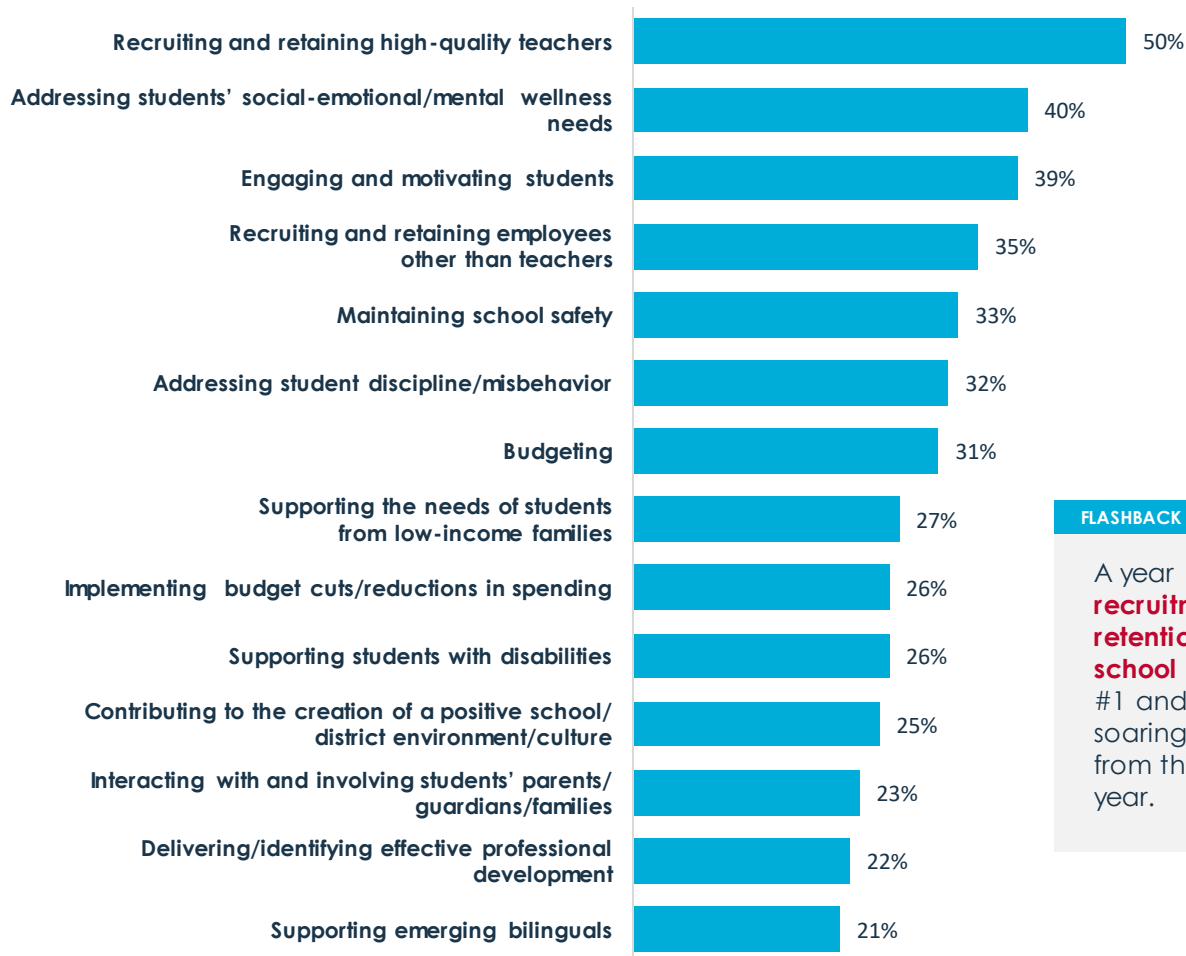
**Link to relevant story:**  
 ▪ <https://marketbrief.edweek.org/marketplace-k-12/state-spending-poised-remain-strong-heres-means-k-12-education>

SOURCE: EdWeek Research Center July/August 2023 nationally representative survey of 161 district leaders and 125 school leaders.

# District Priorities And Pain Points

DISTRICT PRIORITIES AND PAIN POINTS

# Teacher Staffing, Student Well-Being Remain Huge Challenges for Districts



**FLASHBACK**

A year ago, **teacher recruitment/retention** and issues of **school climate** ranked #1 and #2—after soaring in importance from the previous year.

**INSIGHT:**  
District and school leaders continue to see major challenges in recruiting and retaining teachers, a problem that emerged in force during the pandemic. Six states last year approved teacher pay increases, and more than 20 were considering it, Education Week reported. Those state policies and proposed actions included raising minimum teacher salaries, providing annual bonuses, and giving paraeducators and educators with specific job titles—such as special education teachers – more money.

**Survey Question:**  
During 2023-24, what, if any, MAJOR professional challenges are you facing or do you expect to face? Select all that apply.

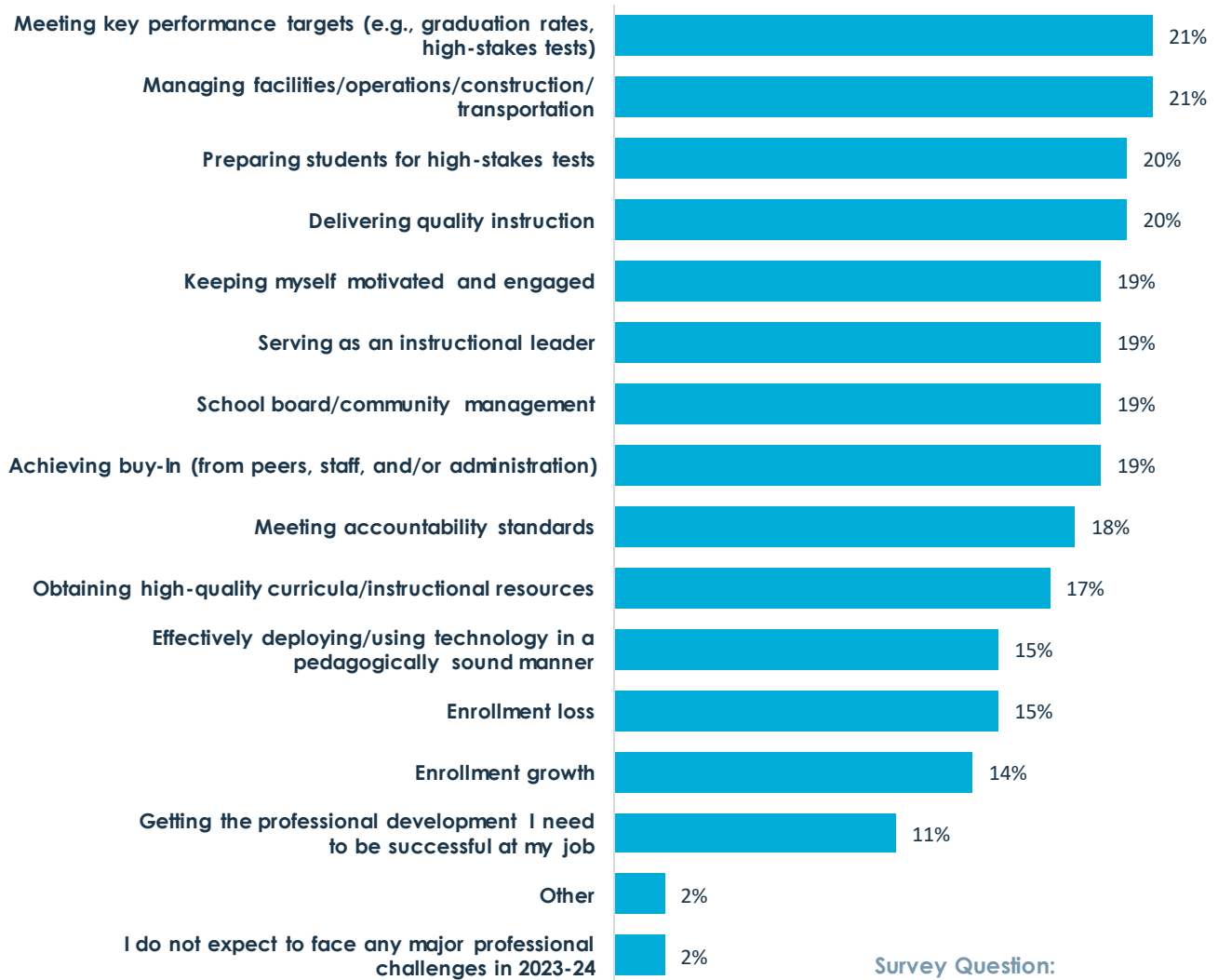
**Link to relevant story:**  

- <https://marketbrief.edweek.org/market-trends/5-key-predictions-education-market-2024>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# Preparing Students for High-Stakes Tests, Other Performance Targets Rank Lower



**Survey Question:**  
During 2023-24, what, if any, MAJOR professional challenges are you facing or do you expect to face? Select all that apply.

**Link to relevant story:**  

- <https://marketbrief.edweek.org/exclusive-data/school-boards-inject-purchasing-decisions>

**INSIGHT:**  
Issues that also typically fall under the responsibilities of district leaders—such as managing school board relationships—were not viewed as urgent challenges, compared to staffing and students’ social-emotional needs. Meeting accountability standards also did not rank very high among K-12 leaders.

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# For Teachers, Student Well-Being, Discipline Are Top of Mind



**INSIGHT:**  
The most pressing challenges classroom teachers face on their jobs are focused, perhaps unsurprisingly, on students: their mental health, how to manage discipline in the classroom, and engaging and motivating them. The concerns about student discipline are especially striking and could reflect the needs of many teachers who are new to the profession and trying to improve at managing classrooms.

**Survey Question:**  
During 2023-24, what, if any, MAJOR professional challenges are you facing or do you expect to face? Select all that apply.

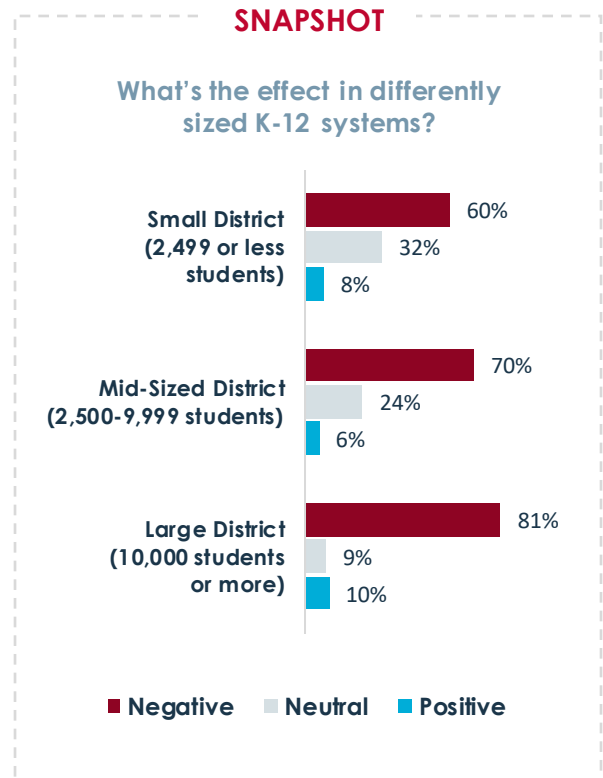
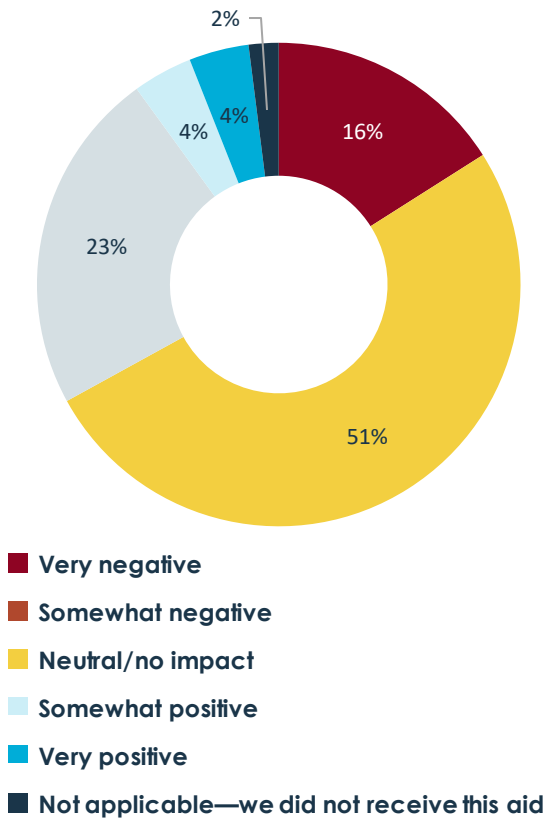
**Link to relevant story:**  

- <https://marketbrief.edweek.org/marketplace-k-12/risks-district-school-leaders-see-tech-based-social-emotional-learning>

SOURCE: EdWeek Research Center nationally representative August survey of 453 teachers.

DISTRICT PRIORITIES AND PAIN POINTS

# A Severe Hit: Nearly 7 in 10 K-12 Officials Foresee Negative Academic Impact From Stimulus Loss



**INSIGHT:**

District and school leaders believe the expiration of stimulus funding will be felt in the classroom. A recent analysis by Harvard University and Stanford University researchers suggests that federal, state, and local investments in academic recovery are paying off, with grade 3-8 students gaining back a third of their lost learning in math, and also making strides in reading. The challenge for districts will be sustaining that momentum without massive federal support.

**Survey Question:**

In your view, what kind of impact will the expiration of federal COVID stimulus funding have on academic outcomes in your district or school over the next two years?

**Link to relevant story:**

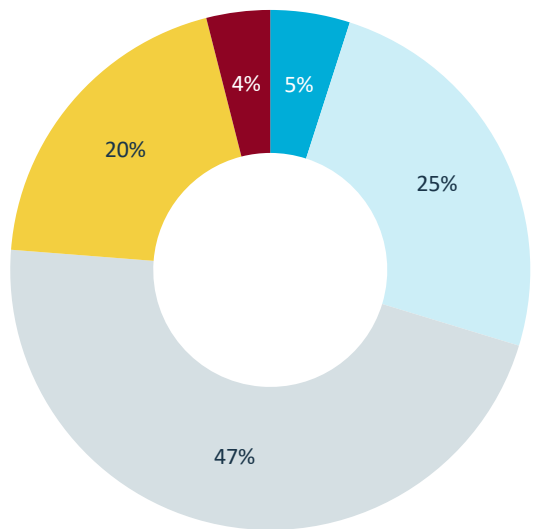
- <https://marketbrief.edweek.org/exclusive-data/depth-learning-loss-bad-across-subjects>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# Mixed Sentiments on the Right Amount Of Ed Tech for Classrooms Today

## District Leaders, School Leaders, & Teachers



- Way too much—needs to be reduced a lot
- Too much—needs to be reduced a little
- The perfect amount
- Too little—needs to be increased a little
- Way too little—needs to be increased a lot

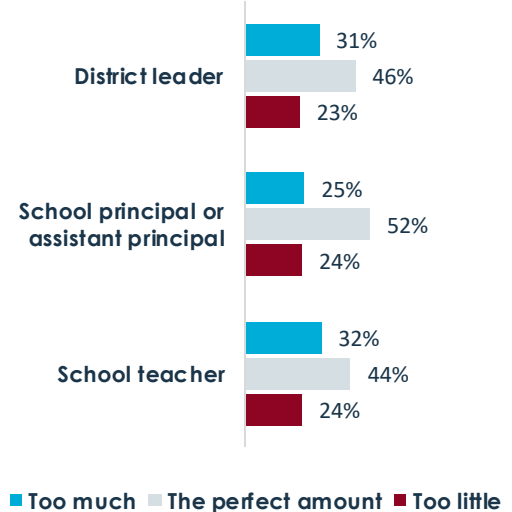
Totals may not add up to 100% due to rounding.

**INSIGHT:**

Tech use grew rapidly, by necessity, during the pandemic, but many school systems have sought ways to scale it back since then. The survey suggests an overall acceptance with tech’s role in classrooms, with a slightly stronger percentage of K-12 officials seeing too much digital activity in learning environments (30 percent) as those who say there is too little (24 percent), and nearly half describing it as the perfect amount.

**SNAPSHOT**

District leaders, teachers more likely than principals to see too much tech in classrooms



**Survey Question:**

How would you describe the amount of ed-tech currently in use in your classroom, district, or school?

**Link to relevant story:**

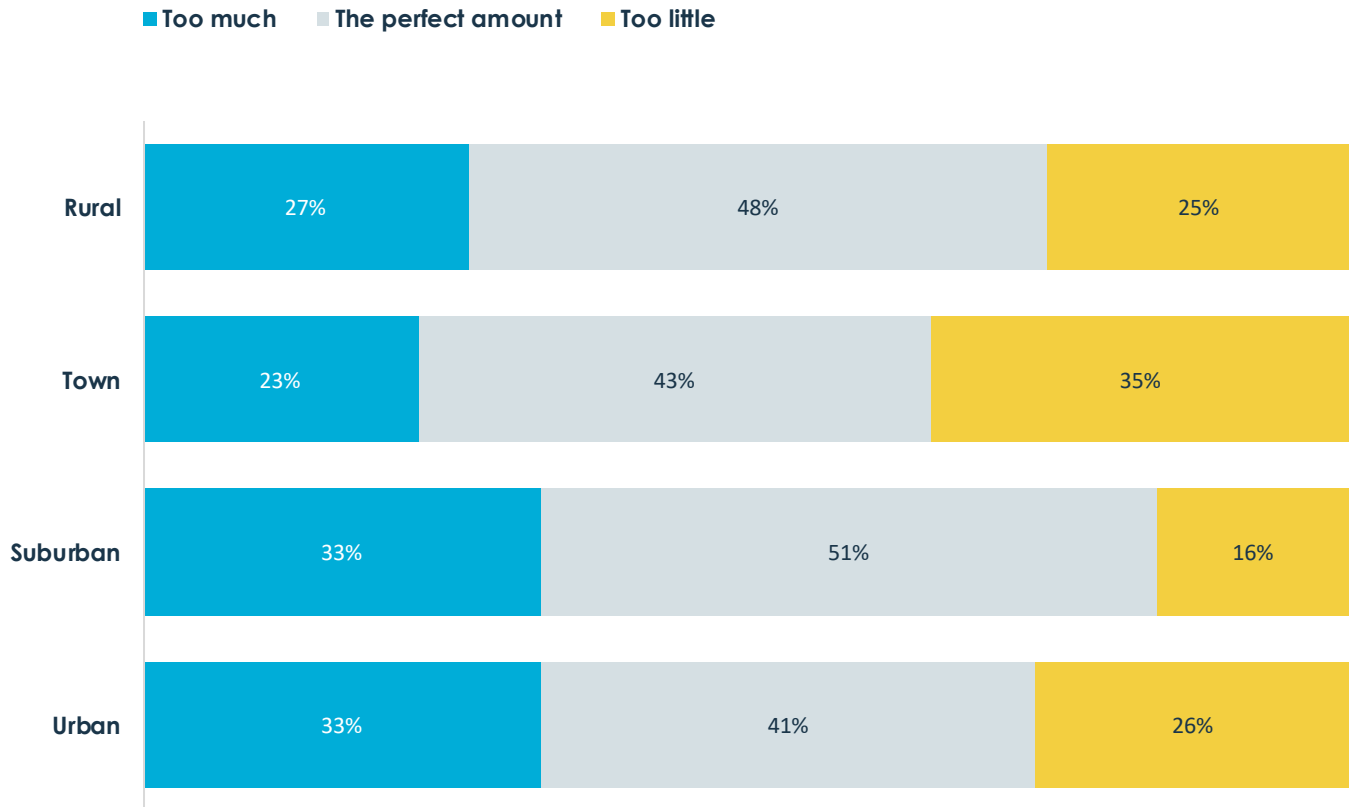
- <https://marketbrief.edweek.org/market-trends/dilemma-districts-balance-print-versus-digital-mix>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders, 271 school leaders, and 453 teachers.



DISTRICT PRIORITIES AND PAIN POINTS

# Urban, Suburban Districts More Likely To See Too Much Ed Tech in Schools



**INSIGHT:**

District and school leaders and teachers in rural areas have a more favorable view of tech's current role in their schools than do their urban and suburban counterparts. (The differences are statistically significant.) K-12 officials in smaller and more rural communities may be more inclined to see digital tools/platforms as creating opportunities for students that did not exist, because of previous lack of investment in that area.

**Survey Question:**

How would you describe the amount of ed-tech currently in use in your classroom, district, or school?

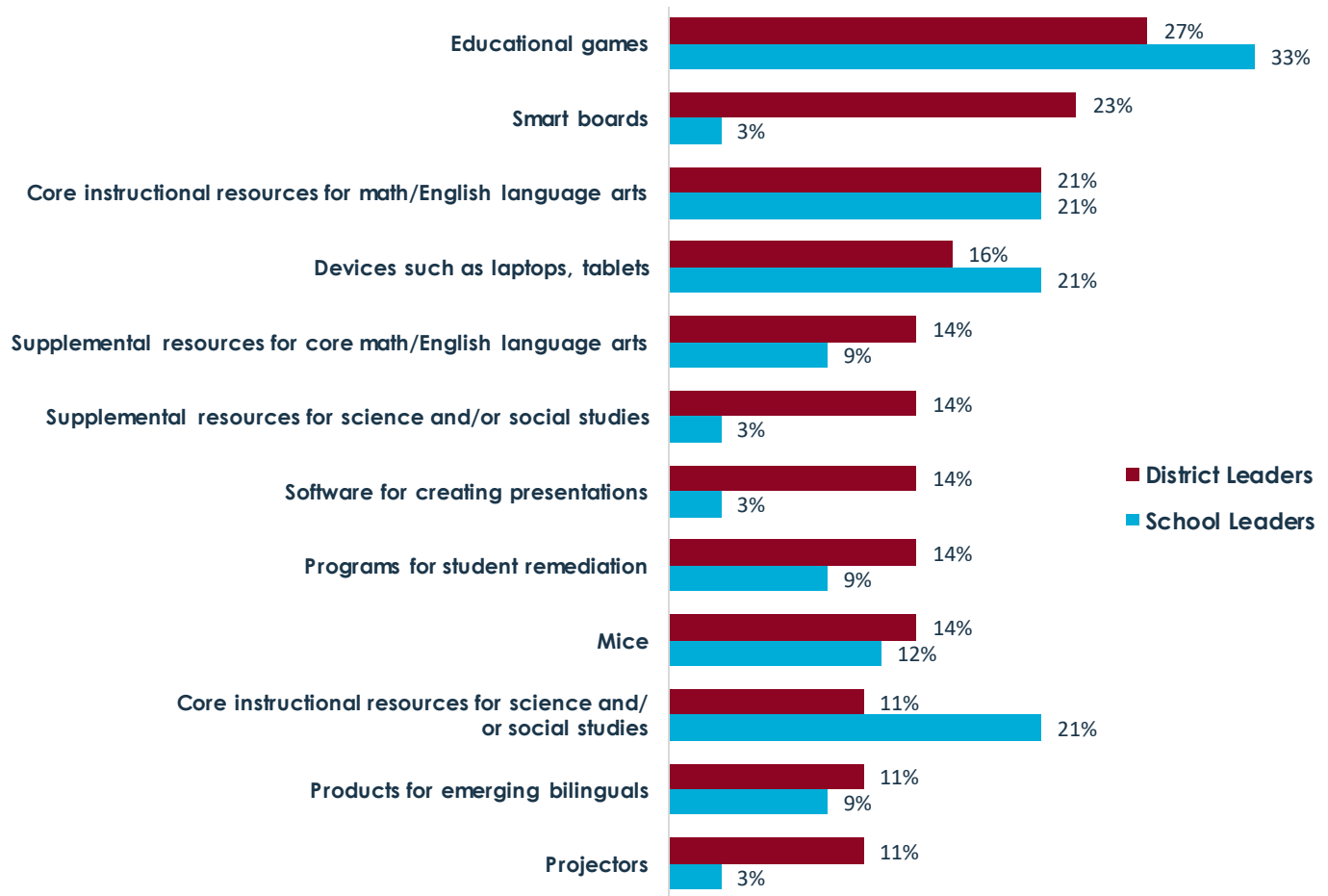
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/technology-seen-bridge-diversity-equity-inclusion>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders, 271 school leaders, and 453 teachers.

DISTRICT PRIORITIES AND PAIN POINTS

# Which Tech Do K-12 Officials Want Scaled Back?



**INSIGHT:**

Asked what kind of tech they would want reduced, district and school leaders pointed to games, as well as smart boards. One finding that stands out: roughly 1 in 5 district and school leaders would like to see a scaling back of ed-tech products in core math and ELA subjects. This suggests that many administrators, when it comes to subjects in which their students' performance will be evaluated closely, have a strong faith in print-based delivery of learning.

**Survey Question:**

In your view, which types of ed-tech products should your district or school scale back on over the next year? Select all that apply.

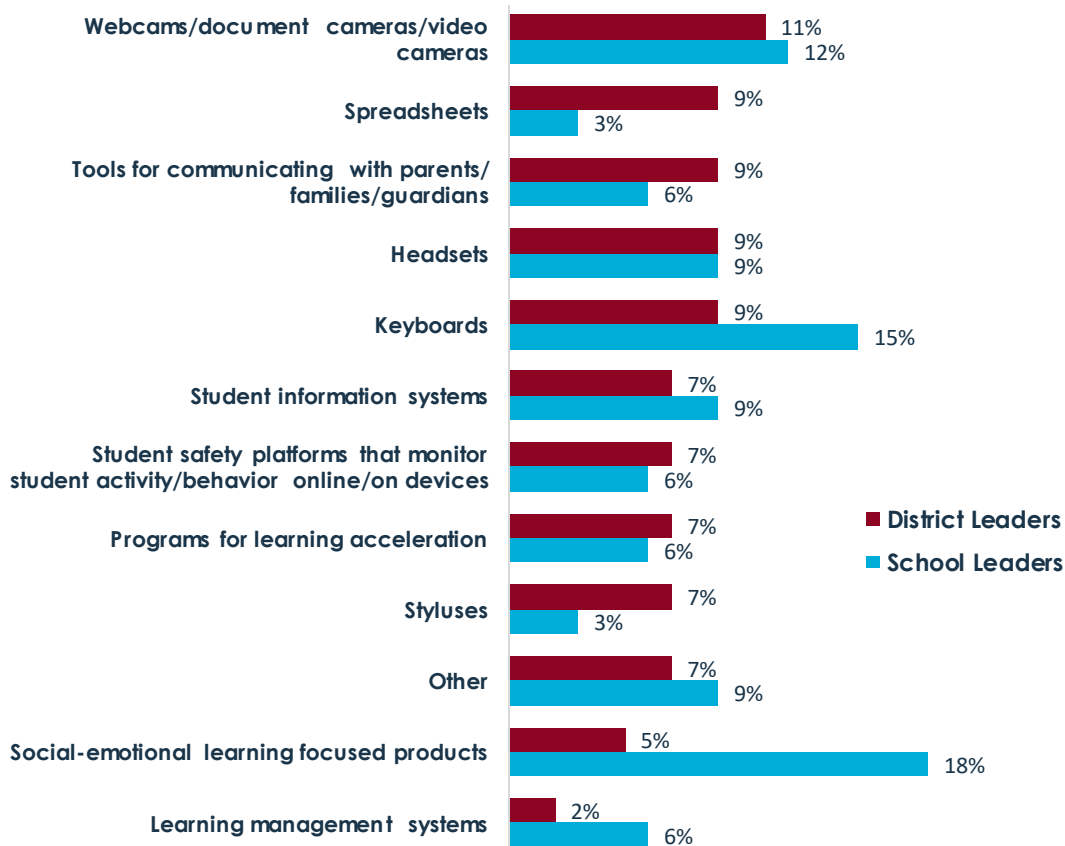
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/4-key-reasons-educators-accept-reject-technology>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# Scaling Back Tech: Divide on Value of Digital Applications of SEL (continued)



**INSIGHT:**

School leaders are not nearly as confident in the value of tech-based SEL as their district administrator bosses are, perhaps because they've seen value in non-digital approaches to bolstering student well-being. When the survey results for teacher respondents are brought into the mix, the crosstab data also reveal some differences in their attitudes toward tech, compared with K-12 administrators. For instance, school and district leaders are much more likely to want tech-based educational games reduced (33 percent and 27 percent, respectively, indicated that) than are teachers, at 12 percent, who evidently see much more value in games for learning.

**Survey Question:**

In your view, which types of ed-tech products should your district or school scale back on over the next year? Select all that apply.

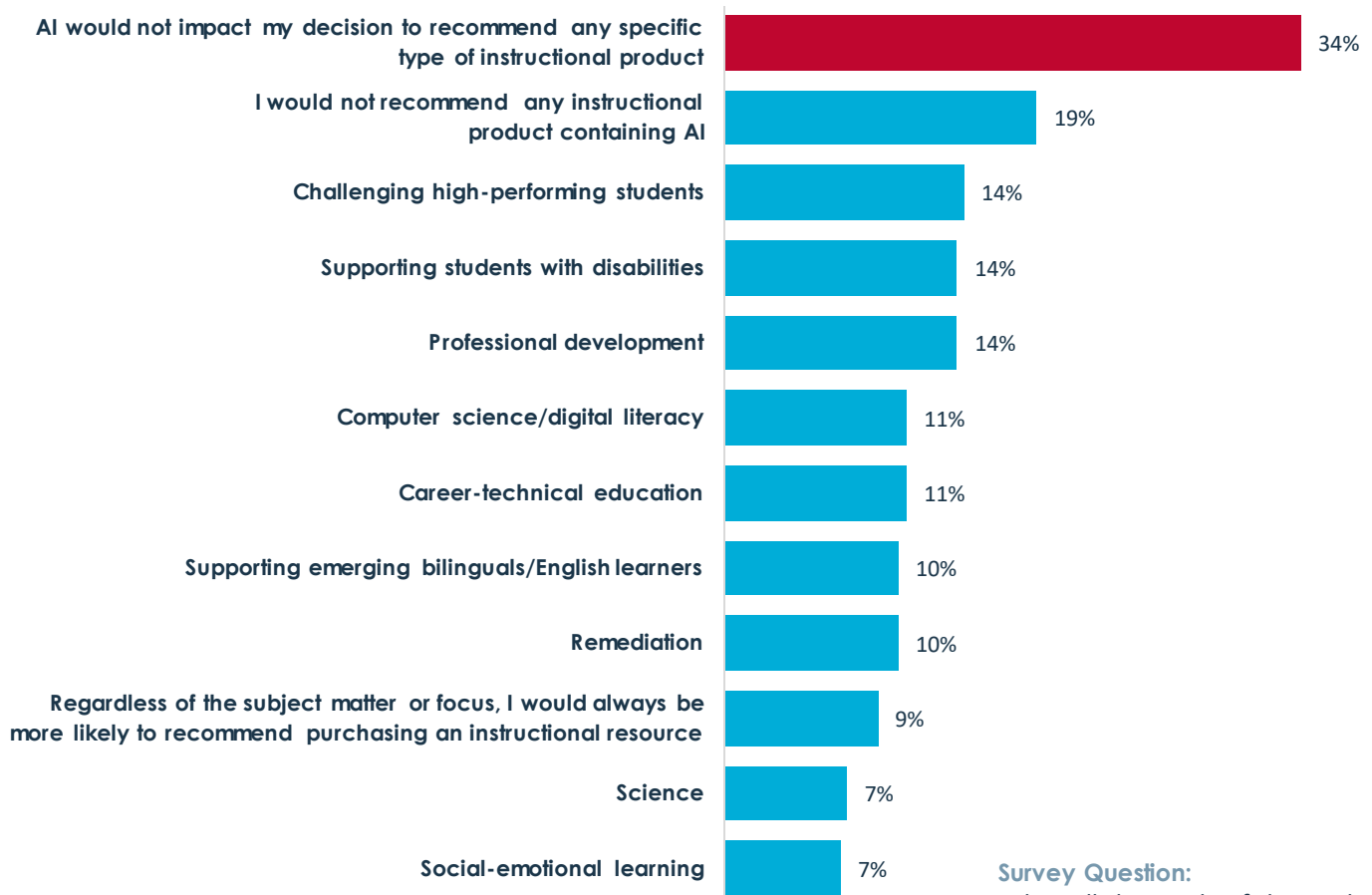
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/4-key-reasons-educators-accept-reject-technology>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# Many District Officials Not Impressed Enough With AI to Recommend Their Districts Use It



**Survey Question:**

Select all that apply. If I learned that it used artificial intelligence, I would be more likely to recommend that my district/school purchase an instructional resource focused on:

**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/features-school-districts-want-artificial-intelligence-products>

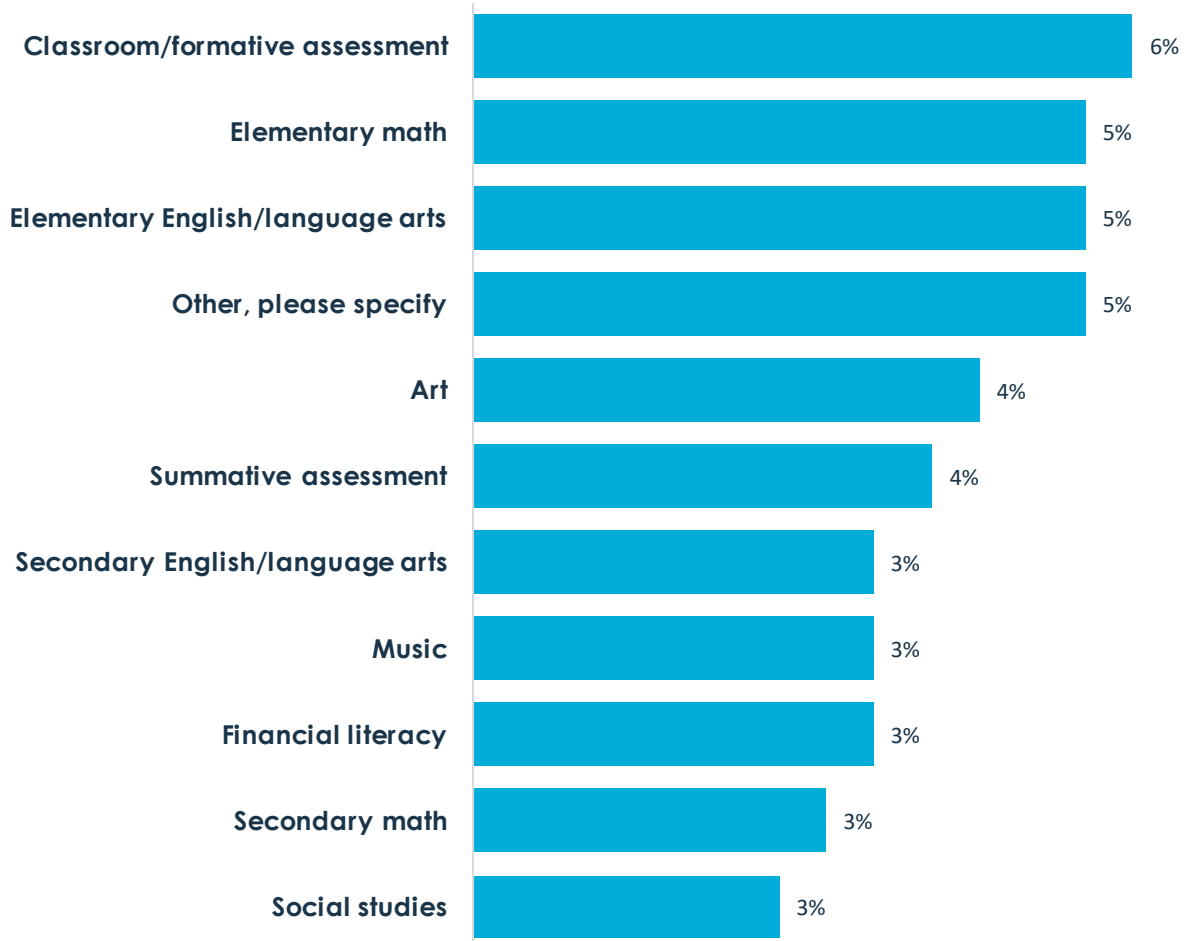
**INSIGHT:**

For all of the interest in how artificial intelligence could benefit K-12, the technology is not, on its own, as of yet a strong selling point for many district and school leaders. Of those who said they would recommend a product based on its AI capability, they are drawn to its power for fairly specific functions, like challenging high-performing students and helping special needs populations.

SOURCE: EdWeek Research Center nationally representative December 2023 survey of 260 district leaders and 166 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# District Officials Don't See AI—On Its Own—as a Reason to Buy Products



**INSIGHT:**

Many companies in the education market hope to harness AI's power. But district and school leaders, at this point, seem skeptical of its utility in core academic subjects or even with products in areas like assessment. K-12 officials will need a clearer explanation of the power of the technology before seeing it as an asset worthy of investment.

**Survey Question:**

Select all that apply. If I learned that it used artificial intelligence, I would be more likely to recommend that my district/school purchase an instructional resource focused on:

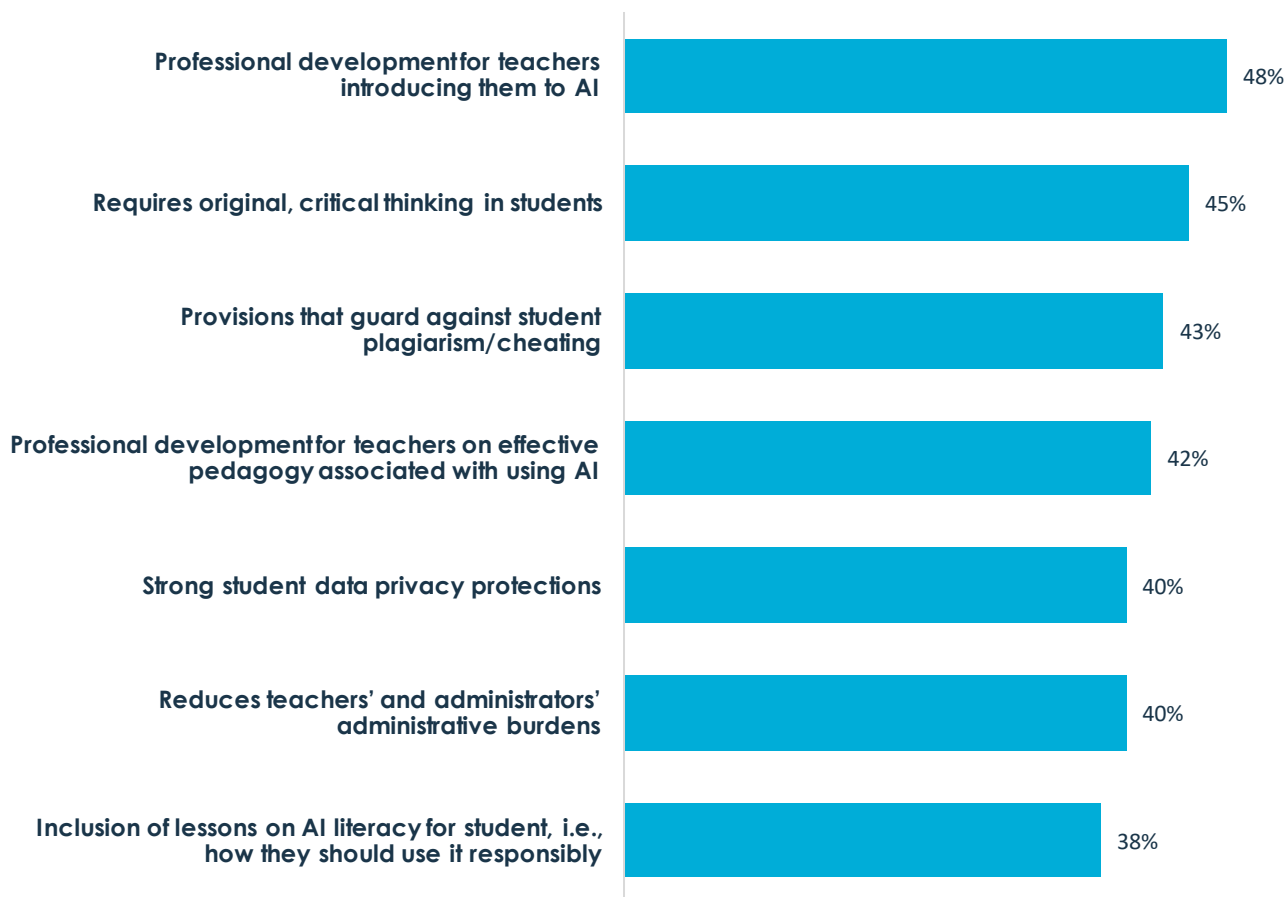
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/ed-tech-industry-group-calls-equity-data-privacy-safeguards-ai>

SOURCE: EdWeek Research Center nationally representative December 2023 survey of 260 district leaders and 166 school leaders.

DISTRICT PRIORITIES AND PAIN POINTS

# What K-12 Officials Want from AI: Support For Teachers, Critical Thinking for Students



**INSIGHT:**

EdWeek Market Brief's survey data suggest that the future of AI as an instructional tool will hinge to no small extent on teacher buy-in. Classroom educators want training on AI; but more broadly, they will also want the assurance that it won't lead to unintended consequences, in cheating or an erosion of students' critical thinking skills. (There were no statistically significant differences between district and school leaders and teachers in their highest-ranked preferences on this survey question).

**Survey Question:**

In order to feel comfortable using an ed-tech product that incorporates artificial intelligence in your classroom, district, or school, what, if any, features would you want to see that you would not necessarily expect if the product did not incorporate AI? Select all that apply.

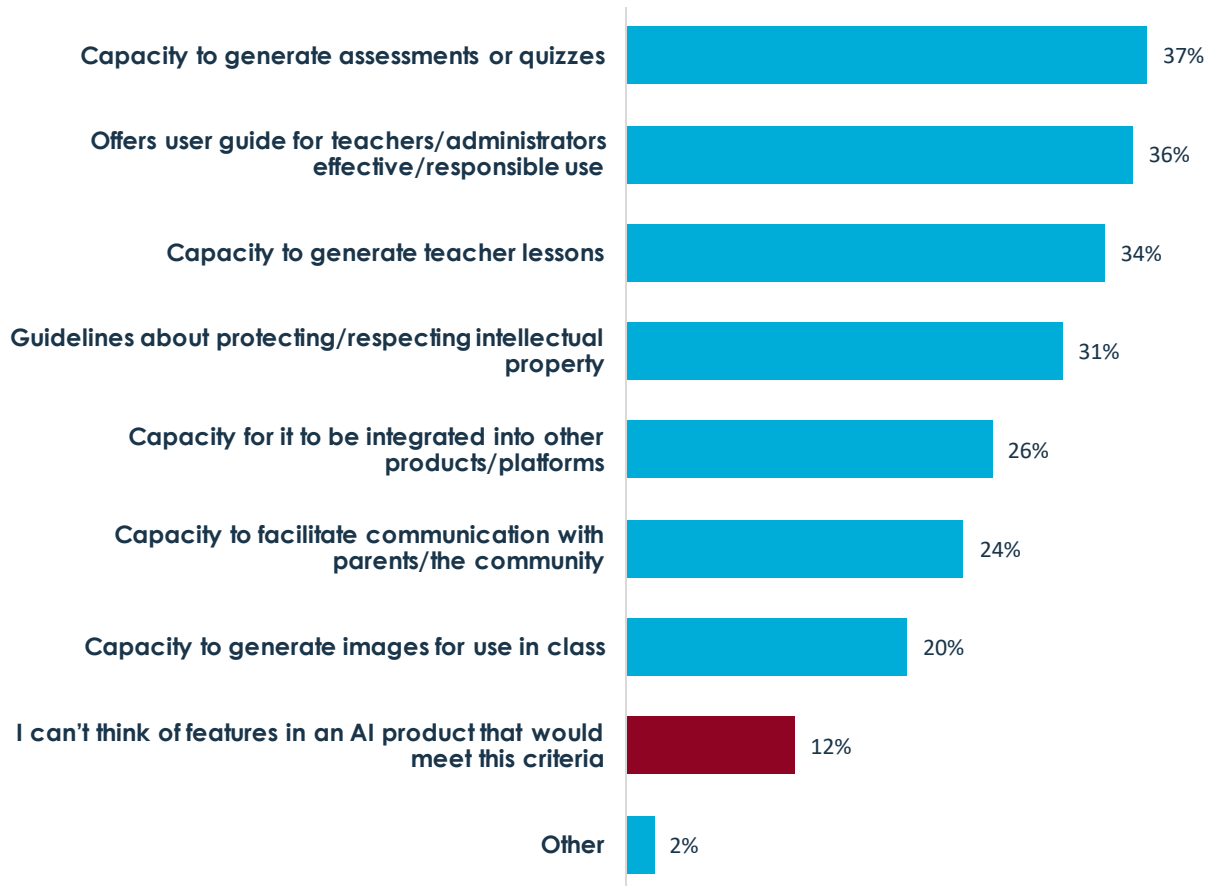
**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/strong-demand-ai-focused-workforce-skills-analysis-online-platform-finds>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders, 271 school leaders, and 453 teachers.

DISTRICT PRIORITIES AND PAIN POINTS

# K-12 Officials See Potential in AI Tools To Generate Assessments, Lessons



**INSIGHT:**

Relatively large numbers of K-12 officials see the potential for AI to help with issues such as assessments and generating teacher lessons. But guidance for teachers is critical. David Jarboe, director of instructional technology at the Harrison School District 2 in Colorado Springs, told *EdWeek Market Brief* last year that support for educators is a prerequisite for his system using AI. “AI should never be the final decisionmaker—it should be like your co-teacher or thought-partner,” he said. “But the teachers need to be the ones making that final decision.”

**Survey Question:**

In order to feel comfortable using an ed-tech product that incorporates artificial intelligence in your classroom, district, or school, what, if any, features would you want to see that you would not necessarily expect if the product did not incorporate AI? Select all that apply.

**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/features-school-districts-want-artificial-intelligence-products>

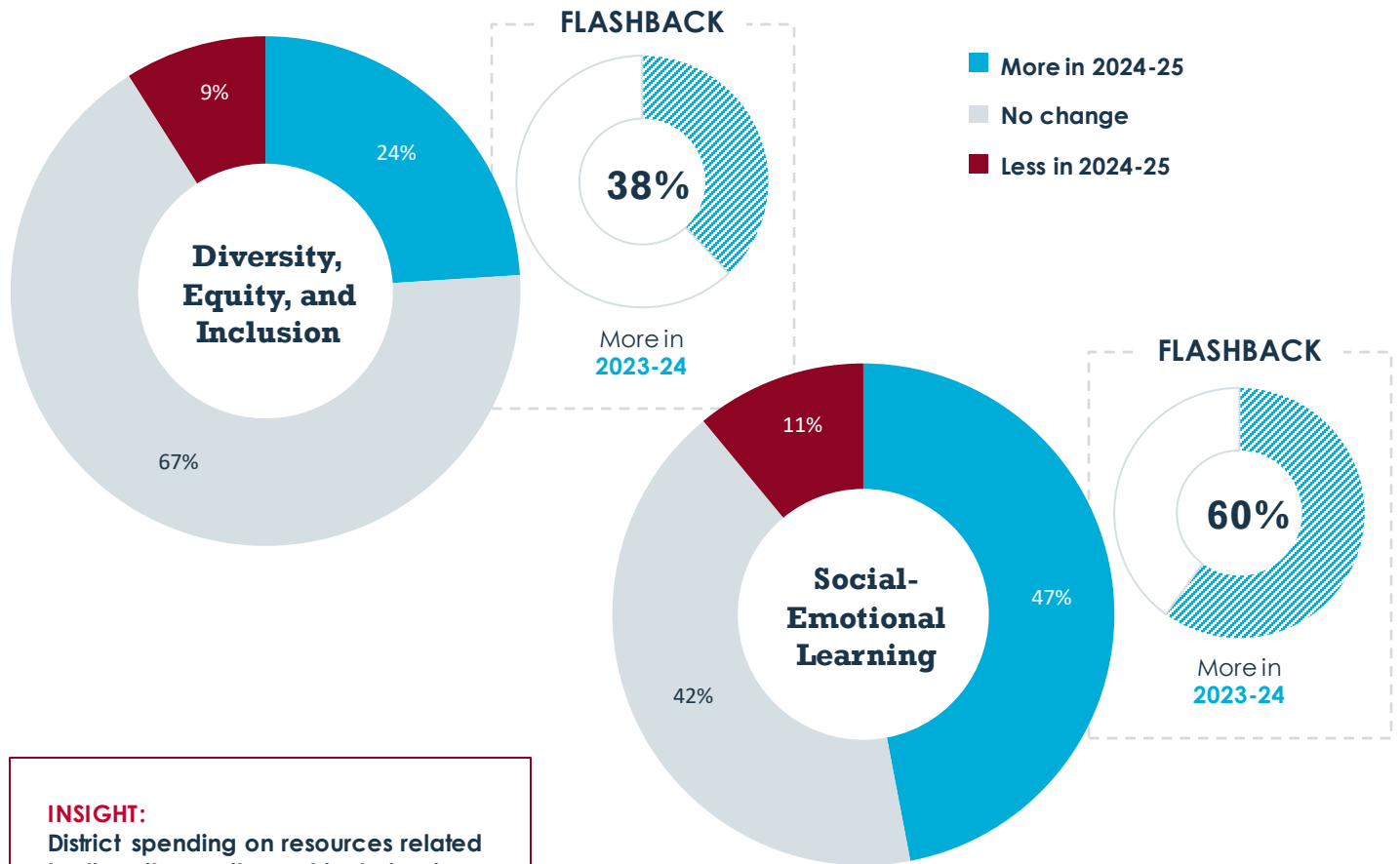
SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders, 271 school leaders, and 453 teachers.

# Spending by Product Category



SPENDING BY PRODUCT CATEGORY

# Spending on DEI Resource Will Take Pronounced Hit; SEL Spending to Slow, But Still a Priority



**INSIGHT:**  
 District spending on resources related to diversity, equity, and inclusion is poised to plummet next fiscal year. This could reflect the rush of state activity in recent years focused on restricting lessons on race- and gender-focused topics, and districts' fear of running afoul of those policies. Spending on SEL is also projected to fall, though overall, it remains one of the highest-ranking categories for future spending.

**Survey Question:**

When it comes to the following types of curriculum, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

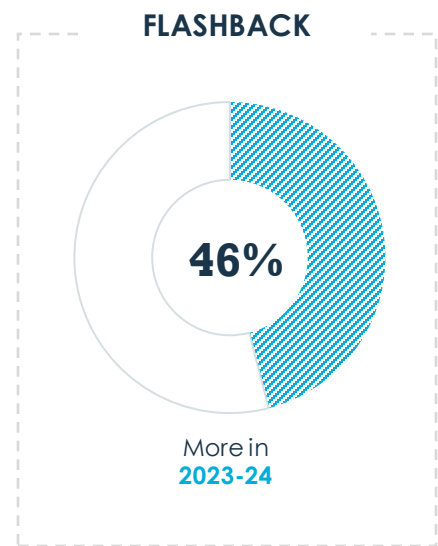
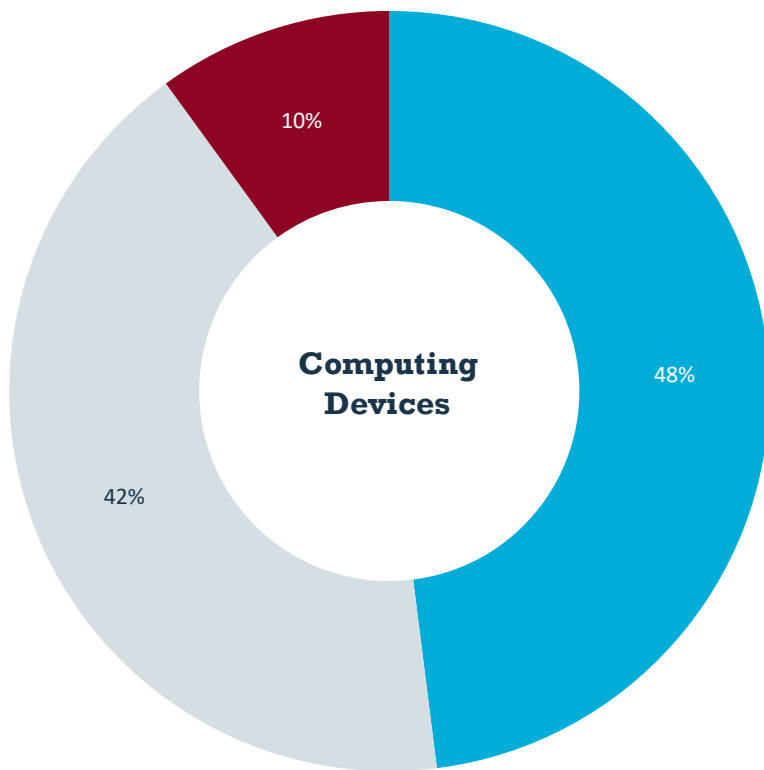
- <https://marketbrief.edweek.org/market-trends/districts-put-new-focus-biggest-gap-social-emotional-learning-teacher-well>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Anticipated Spending on Devices Still Robust

■ More in 2024-25   ■ No change   ■ Less in 2024-25



**Survey Question:**

When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

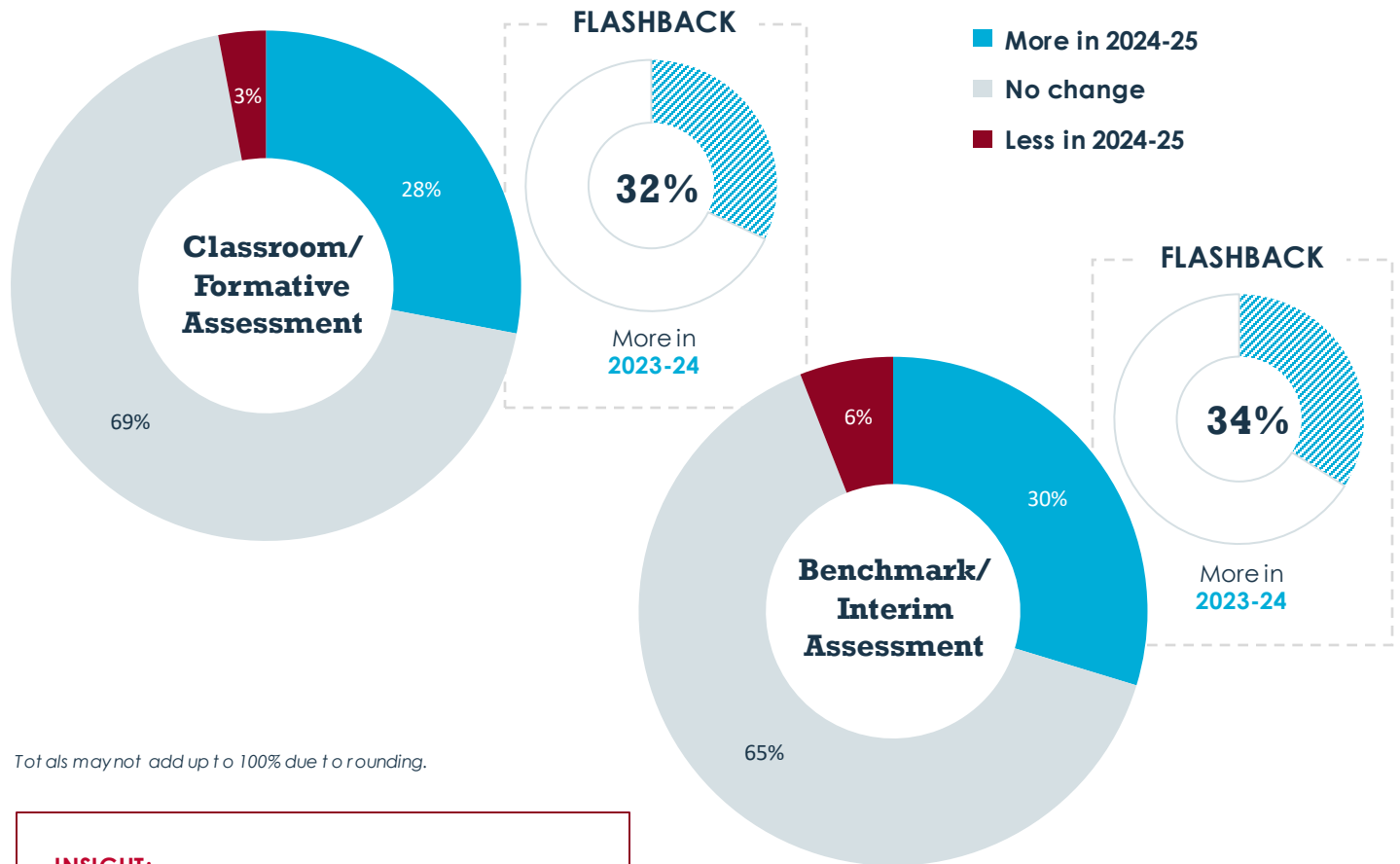
- <https://marketbrief.edweek.org/marketplace-k-12/tech-devices-better-connectivity-major-focus-stimulus-spending-report-finds>

**INSIGHT:**  
 Many school systems moved to 1-to-1 student-to-device systems out of necessity during the pandemic, or otherwise made heavy investments in Chromebooks, iPads, and Windows tools. Federal stimulus funding helped cover some of these costs. But even as that emergency aid is going away, our survey suggests overall spending on devices will remain robust, a sign of districts' desire to fill holes in that area or replenish what they already have.

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Anticipated New Spending on Classroom, Benchmark Assessments Only Slightly Lower



Totals may not add up to 100% due to rounding.

**INSIGHT:**

Expected investments in classroom and interim/benchmark assessments are projected to remain steady. Interim tests have become commonplace in schools, though they are also drawing increasing scrutiny. As Education Week reported last year, RAND Corporation research found that more than 80 percent of school principals in the country say interim tests they use align to state standards. But a third of teachers say the tests don't align with their curricula and don't accurately measure student learning.

**Survey Question:**

When it comes to the following assessment-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

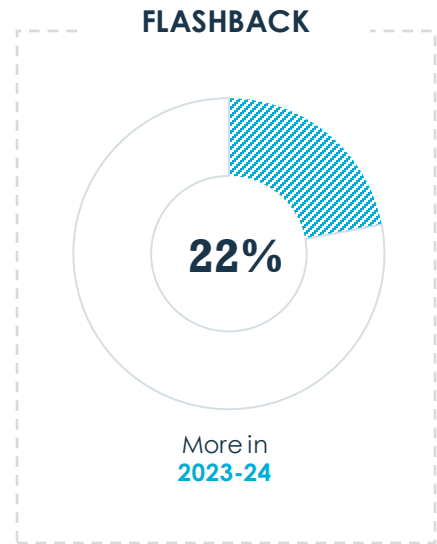
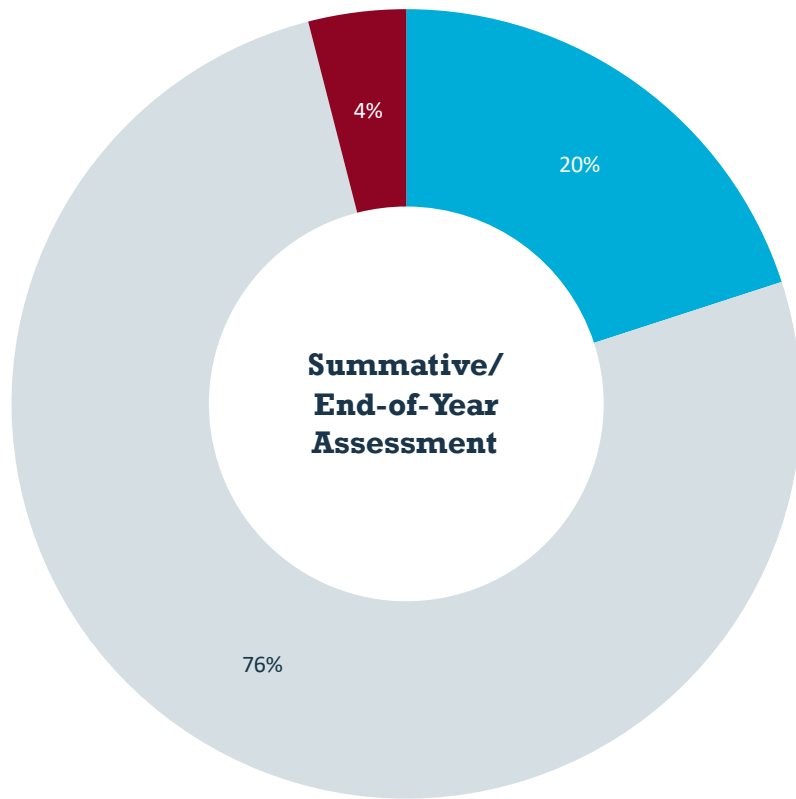
- <https://marketbrief.edweek.org/analysts-view/companies-can-keep-assessment-evolves>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Projections for Summative Test Spending Remain Modest

■ More in 2024-25    ■ No change    ■ Less in 2024-25



**Survey Question:**

When it comes to the following assessment-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

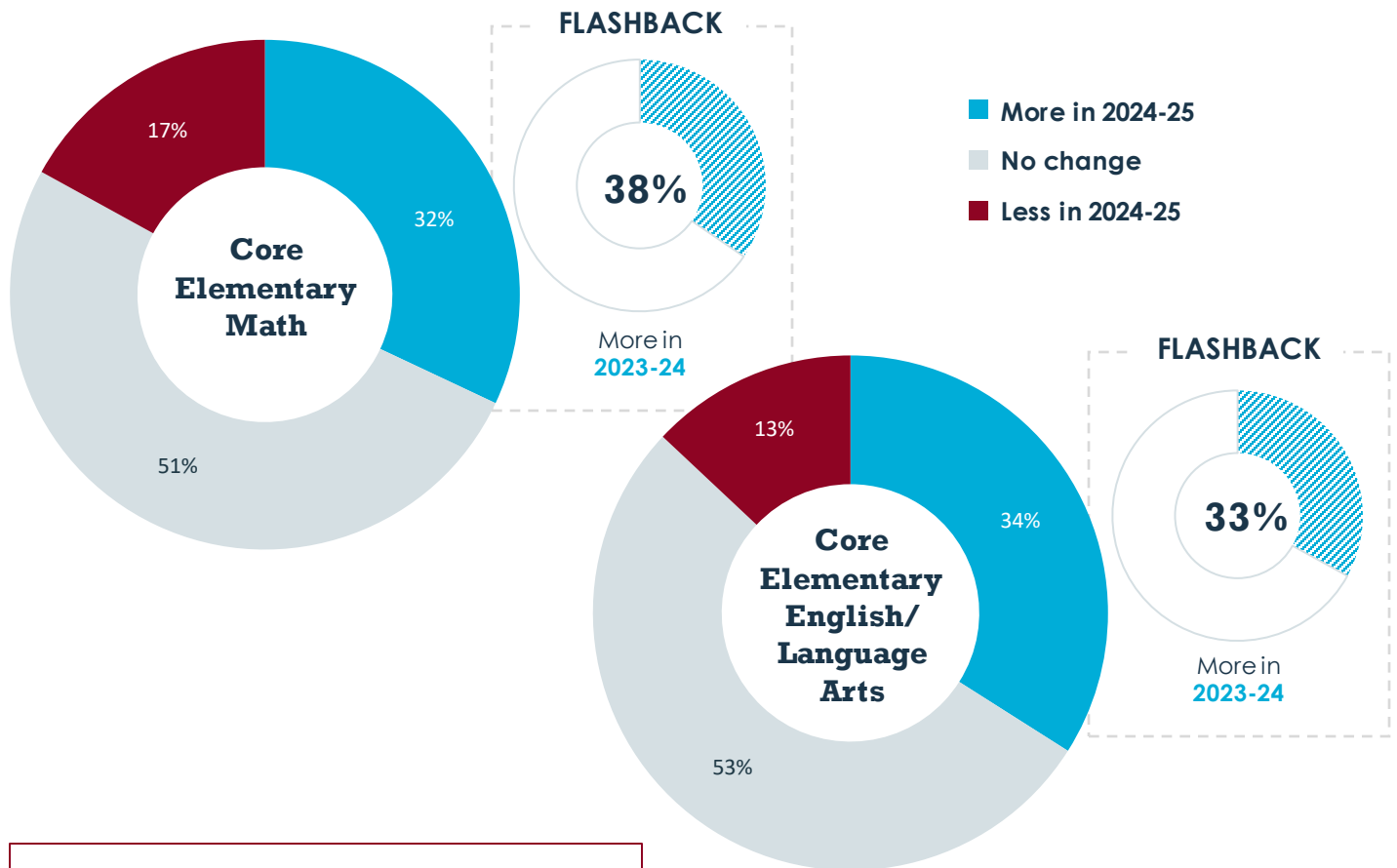
- <https://www.edweek.org/teaching-learning/educators-feel-growing-pressure-for-students-to-perform-well-on-standardized-tests/2023/09>

**INSIGHT:**  
 Projected investment in summative tests for next fiscal year will roughly hold steady, compared to the current year. A number of federal and state policymakers have called for the uses of end-of-year exams to be rethought. A survey conducted by the EdWeek Research Center last year found that just 25 percent of K-12 officials believe summative tests yield useful information. Twice as many, however, said they feel more pressure than before the pandemic to raise student performance on those exams.

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Anticipated Dip in Spending on Core Elementary Math; Core ELA Roughly Level



**INSIGHT:**  
 Spending on early grades learning recovery remains a major priority for school systems battered by “learning loss” since the pandemic. While the focus on core elementary math in particular appears likely to dip somewhat, this could be tied to state curriculum adoption cycles, or to a relatively high number of districts already having chosen new academic resources in that subject the year before, as their significant academic needs came into focus.

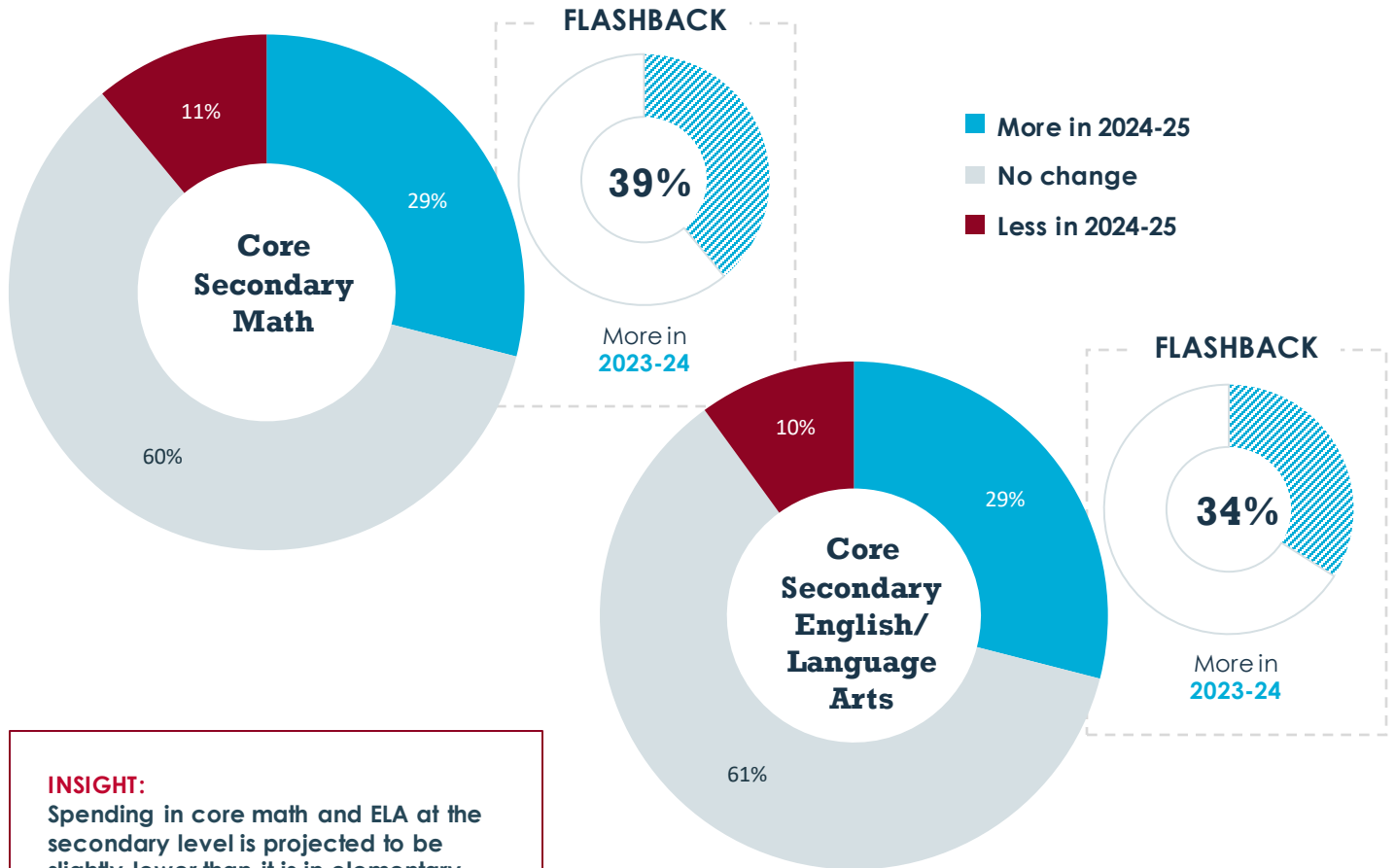
**Survey Question:**  
 When it comes to the following types of elementary school curricula, how do you anticipate your spending for NEXT YEAR’S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**  
 ▪ <https://marketbrief.edweek.org/marketplace-k-12/math-materials-lag-behind-ela-options-terms-quality-analysis-finds>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# District Officials Say Spending on Core Math, ELA Resources Will Slip



**INSIGHT:**  
 Spending in core math and ELA at the secondary level is projected to be slightly lower than it is in elementary schools. Academic recovery has been perceived as a more pressing need at lower grade levels. A separate EdWeek Market Brief survey question, for instance, asked K-12 officials about the percentage of students experiencing significant levels of learning loss. The mean percentage among high school principals was 35 percent, compared to 40 percent at the middle school and 50 percent at the elementary school level.

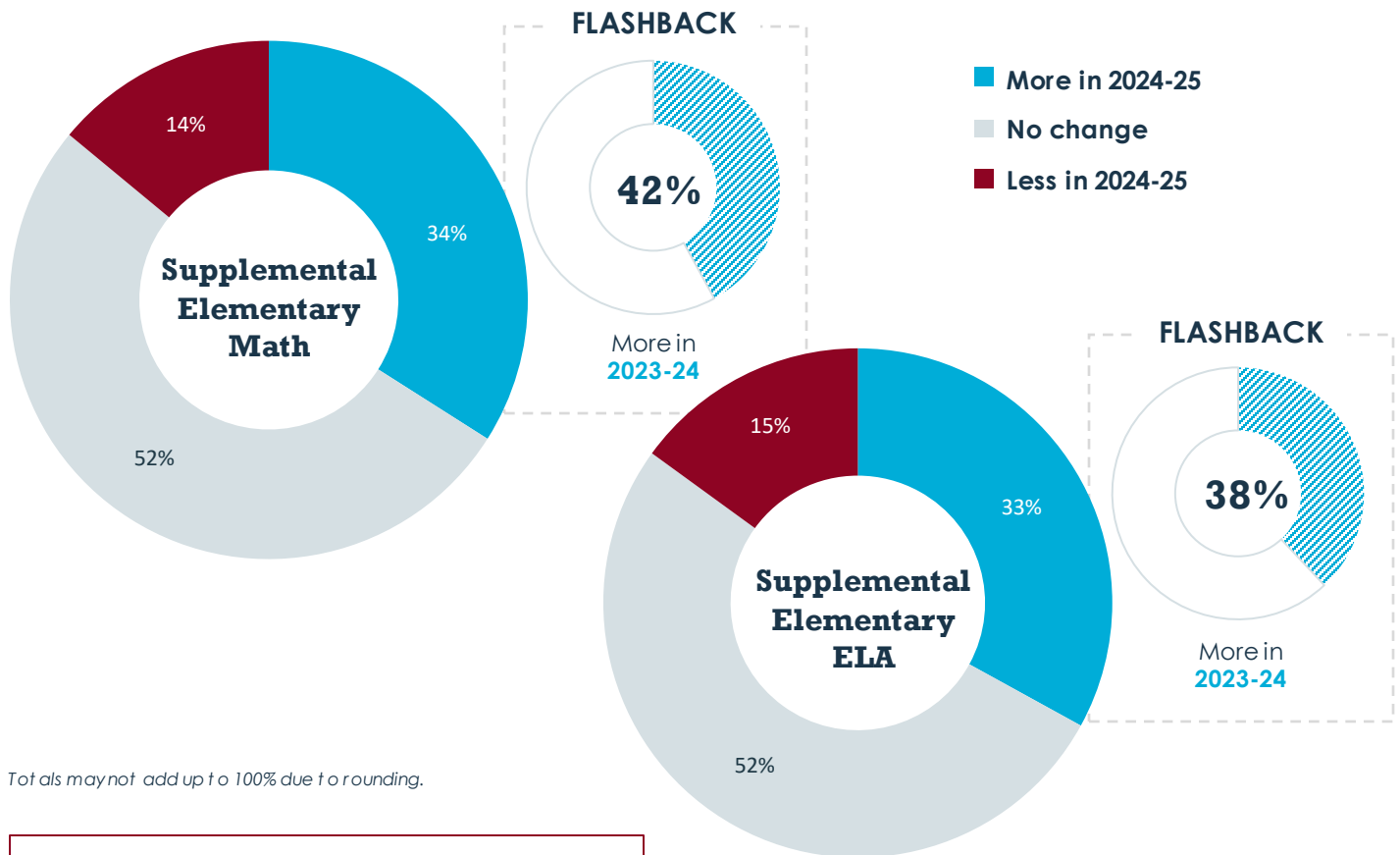
**Survey Question:**  
 When it comes to the following types of middle and high school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

Link to relevant story:  
 ▪ <https://marketbrief.edweek.org/analysts-view/science-reading-shape-middle-high-school-instruction>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Projected Spending on Supplemental Elementary Math Is High and Holds Steady; ELA Falls



Totals may not add up to 100% due to rounding.

**INSIGHT:**

Research released this month by Harvard University and Stanford University suggests students have made considerable progress in recovering lost learning in math, and to a lesser extent reading. EdWeek Market Brief's data finds that districts still see a major need to bolster core curriculum with supplemental materials, though the portion of respondents projecting increased spending is not the same as last year.

**Survey Question:**

When it comes to the following types of elementary school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

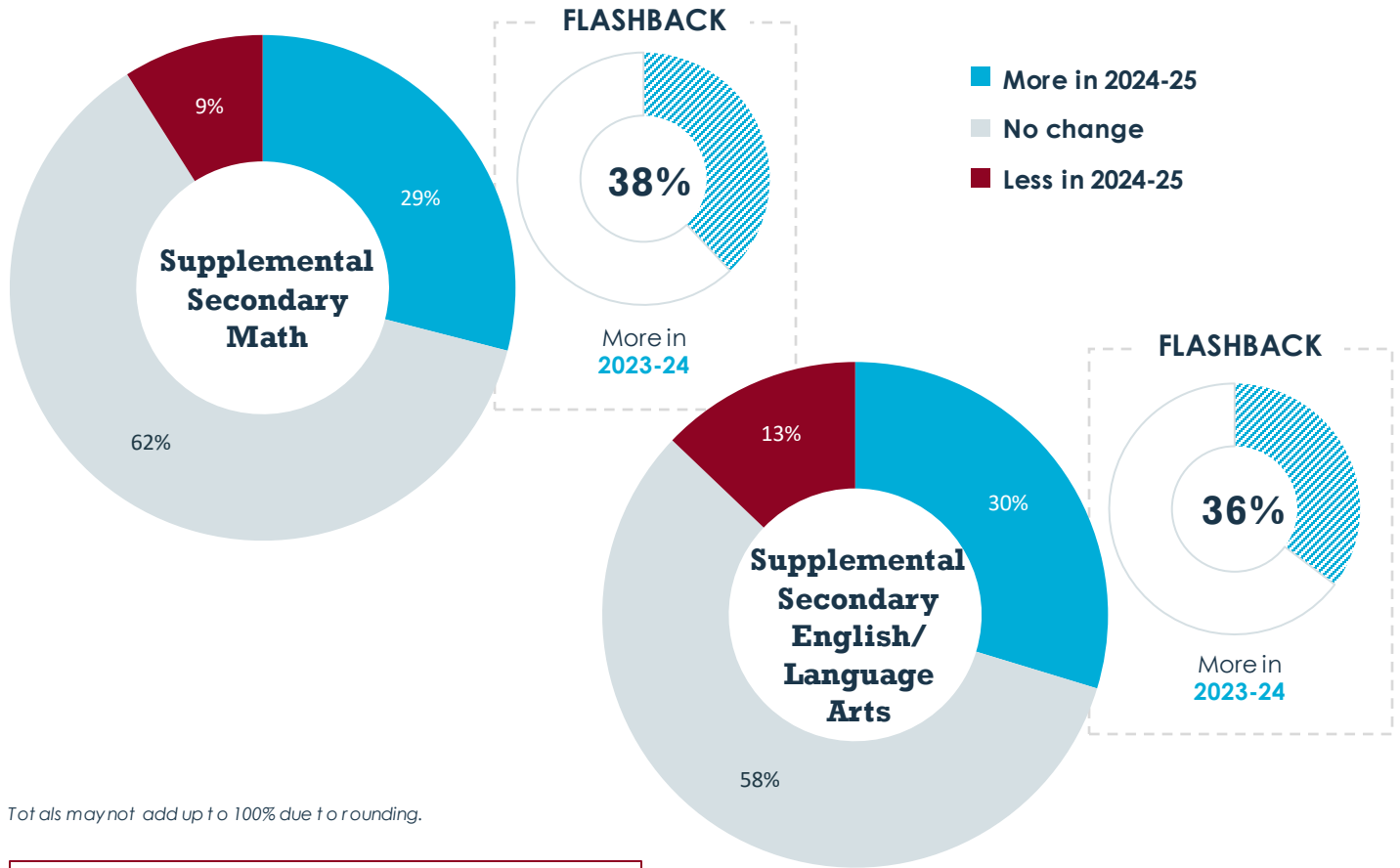
**Link to relevant story:**

- <https://marketbrief.edweek.org/analysts-view/whats-missing-science-reading-focused-products>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Smaller Portion of District Officials Predicting Rise in Supplementary Math, ELA Spending



Totals may not add up to 100% due to rounding.

**INSIGHT:**  
 District leaders' likely spending on supplemental resources in math and ELA will fall, the data suggests. This could simply reflect K-12 officials feeling more pressure to raise performance in earlier grades. It's worth noting that solid majorities of survey respondents say their spending on secondary supplemental materials in math and ELA will remain the same, so the need remains.

**Survey Question:**  
 When it comes to the following types of middle and high school curricula, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

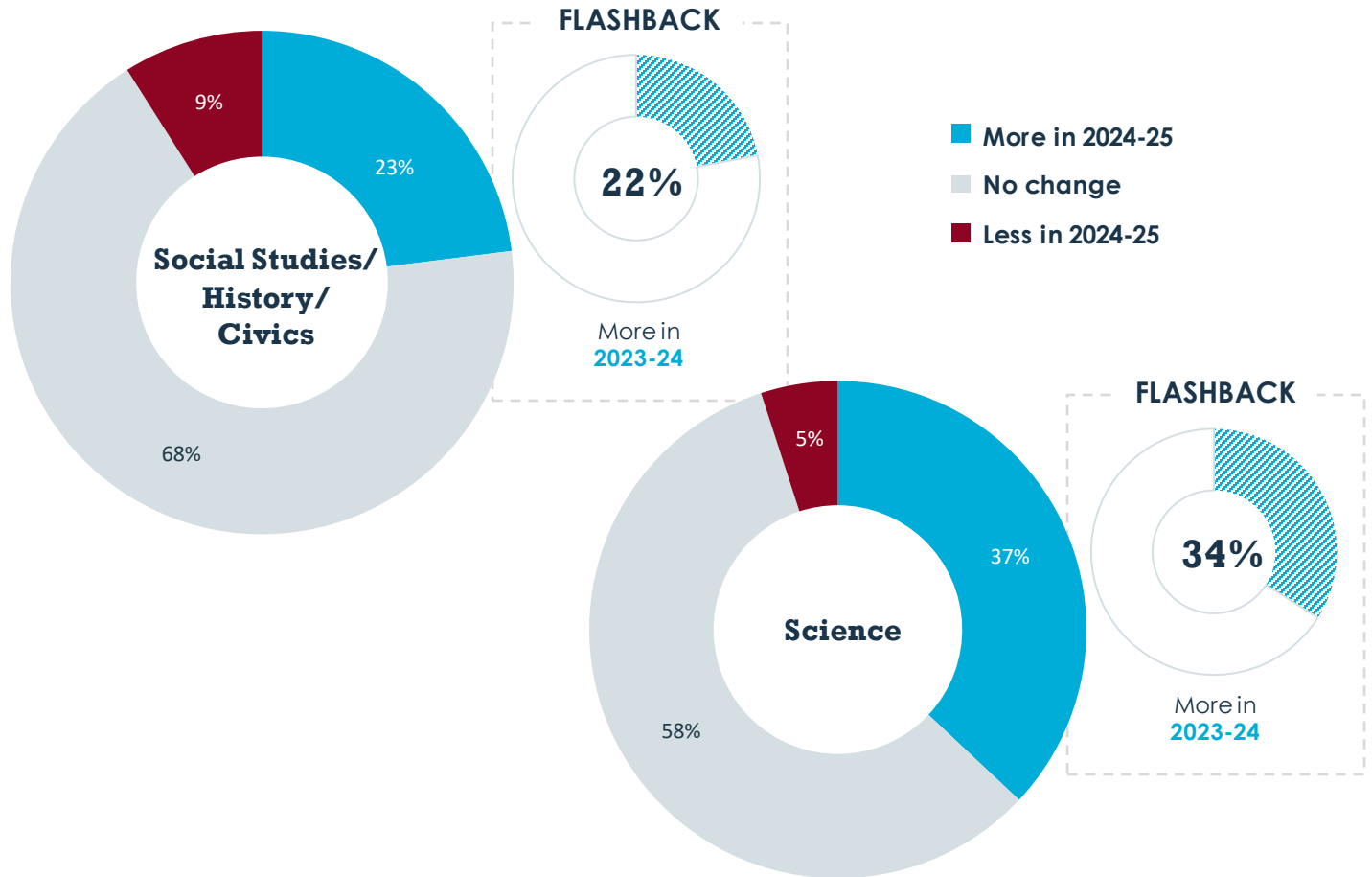
**Link to relevant story:**  
 ▪ <https://marketbrief.edweek.org/analysts-view/texas-approve-d-sweeping-curriculum-overhaul-heres-comes-next>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.



SPENDING BY PRODUCT CATEGORY

# Anticipated Spending on Science Remains Solid, And Holds Steady; Social Studies Is Level



**INSIGHT:**  
 While spending on social studies curriculum is projected to remain roughly the same, science spending continues to be a strong priority for many school districts. The continued interest in investing in science is striking, given the relatively high resources many K-12 systems are pouring into math and reading.

**Survey Question:**  
 When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR’S budget (2043-25) will compare to the spending in the current (2023-24) budget?

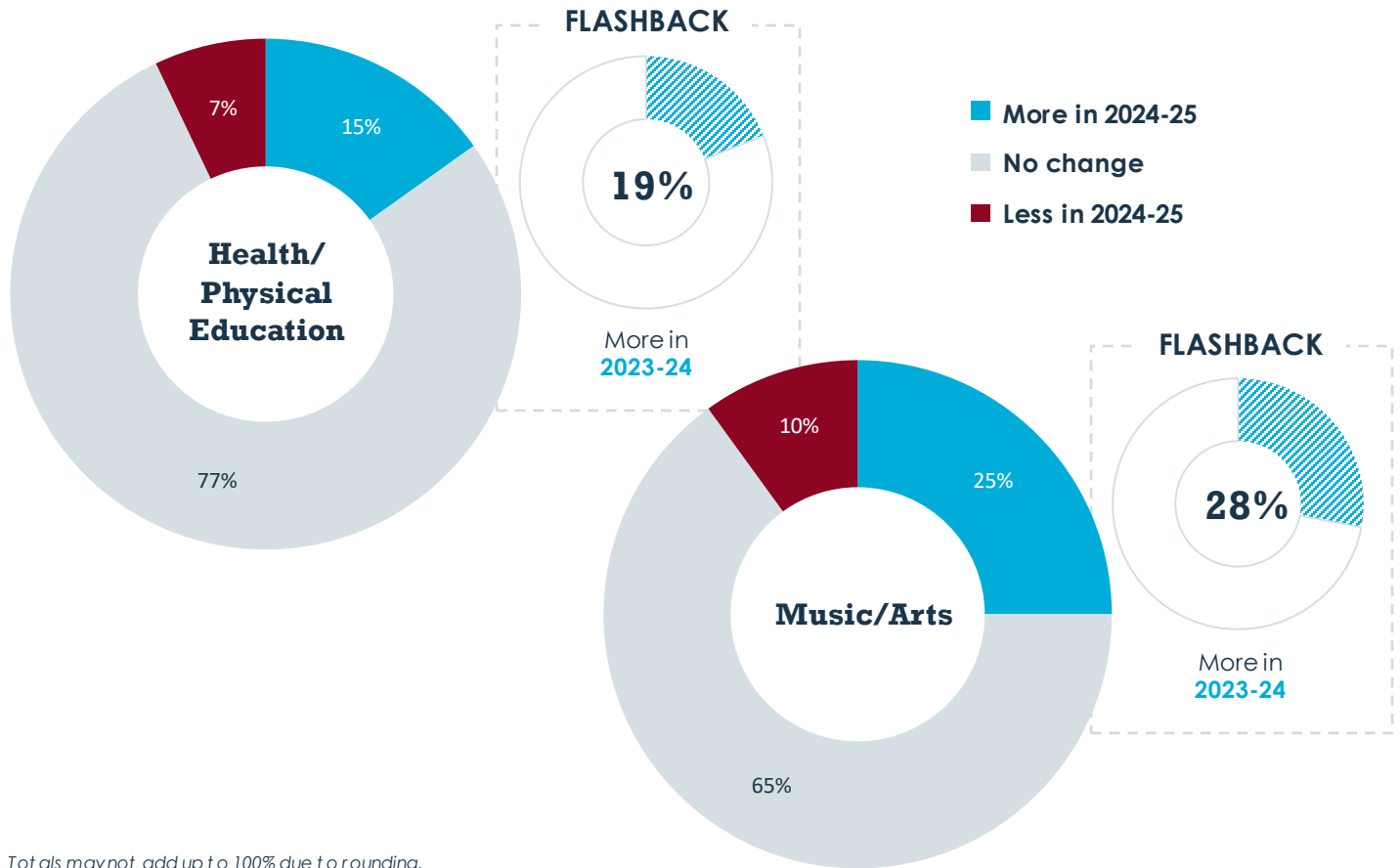
**Link to relevant story:**

- <https://marketbrief.edweek.org/purchasing-alert/new-mexico-district-shops-pd-principals-n-c-system-needs-new-science-exams>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Likely Spending on Health/PE and Music/Arts Mostly Unchanged



Totals may not add up to 100% due to rounding.

**INSIGHT:**  
 Spending on health/PE and music/arts education is projected next to be relatively modest compared to the current fiscal year. One state-specific exception: California voters two years ago approved a measure that devotes more than \$900 million to arts and music programs across the state. Advocates say this could support a diverse array of programs, in areas that include media arts and STEM approaches to the arts.

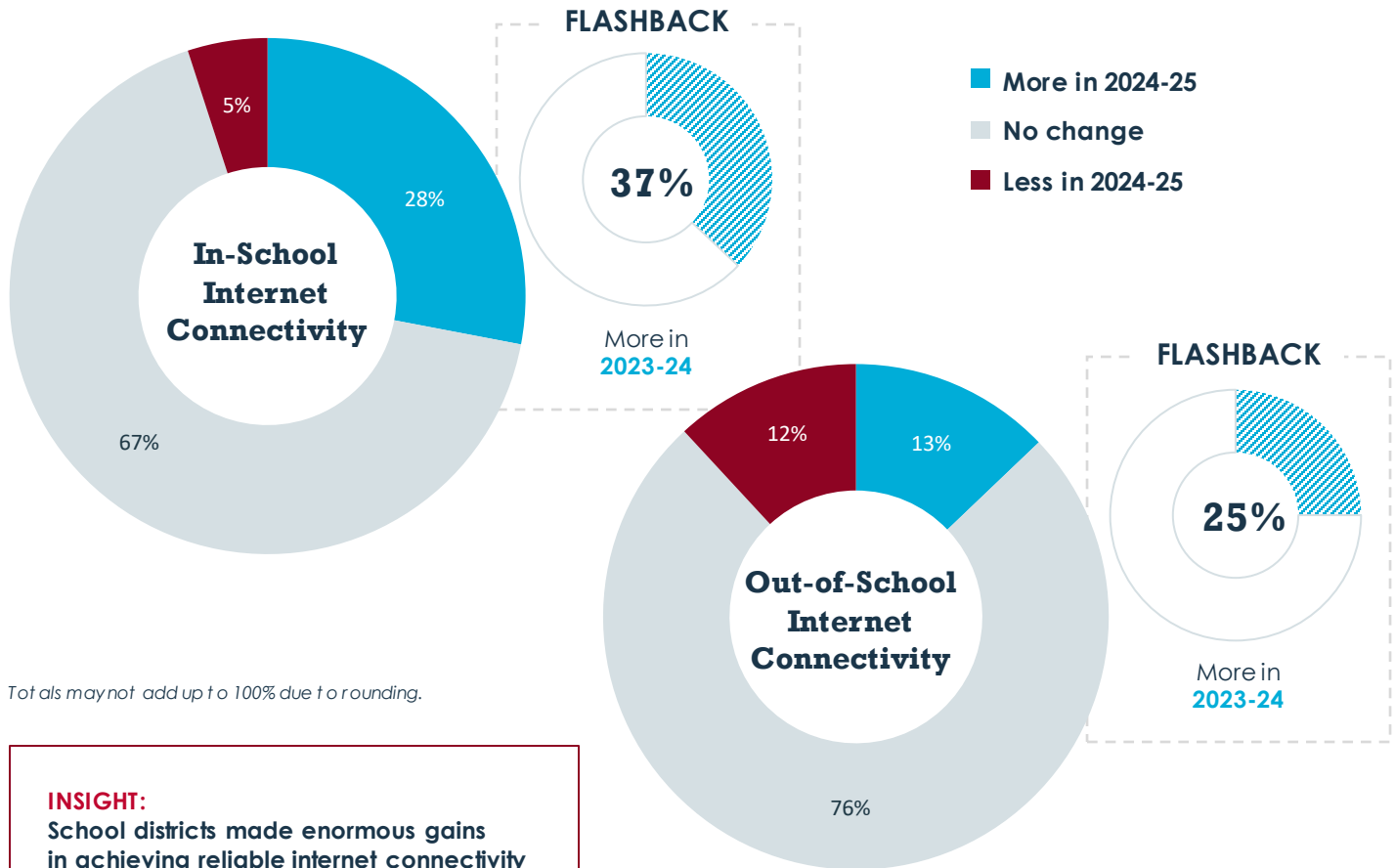
**Survey Question:**  
 When it comes to the following types of curricula, how do you anticipate your spending for NEXT YEAR'S budget (2023-24) will compare to the spending in the current (2022-23) budget?

**Link to relevant story:**  
 ▪ <https://marketbrief.edweek.org/analysts-view/gauging-impact-californias-new-1-billion-arts-music-program>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Much Less Projected Spending On In- and Out-of-School Connectivity, Compared to Last Year



Tot als may not add up to 100% due to rounding.

**INSIGHT:** School districts made enormous gains in achieving reliable internet connectivity pre-COVID, but the pressure to keep up that progress continued after the pandemic. Many school advocates say the most urgent need now is to improve out-of-school connectivity, which makes the EdWeek Market Brief survey results showing projected declines in out-of-school spending striking. While a \$7 billion, stimulus-funded connectivity fund supported off-campus connectivity, the federal E-rate program does not.

**Survey Question:** When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

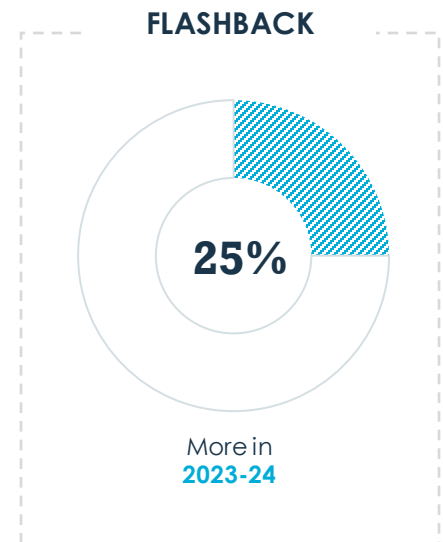
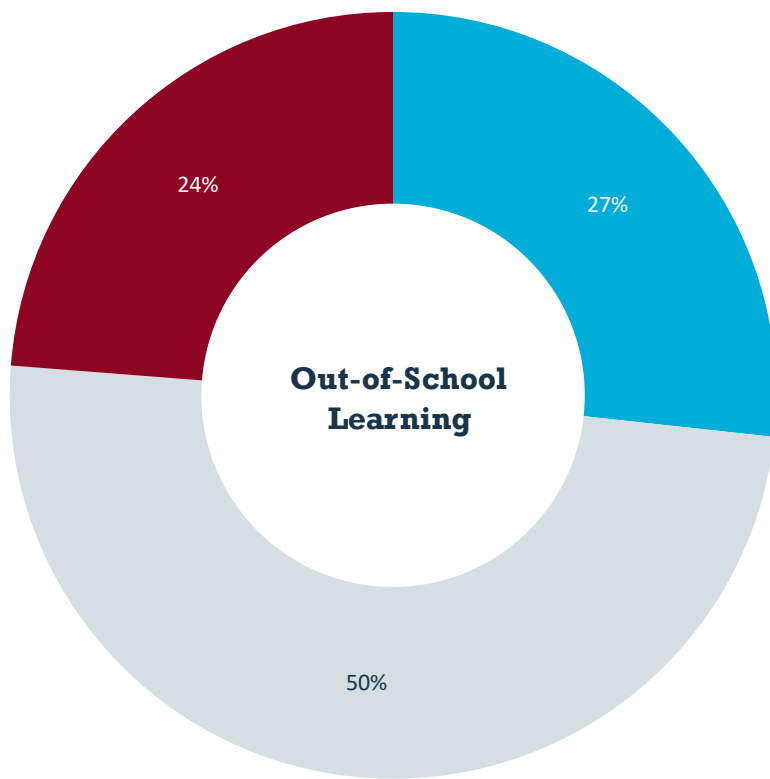
Link to relevant story:  
 ▪ <https://marketbrief.edweek.org/marketplace-k-12/tech-access-huge-need-students-home-internet-access-falling-short>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Spending on Out-of-School Learning Roughly The Same as Last Year

■ More in 2024-25    ■ No change    ■ Less in 2024-25



Totals may not add up to 100% due to rounding.

**Survey Question:**

When it comes to out-of-school learning, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/school-districts-biggest-obstacles-tackling-learning-loss>

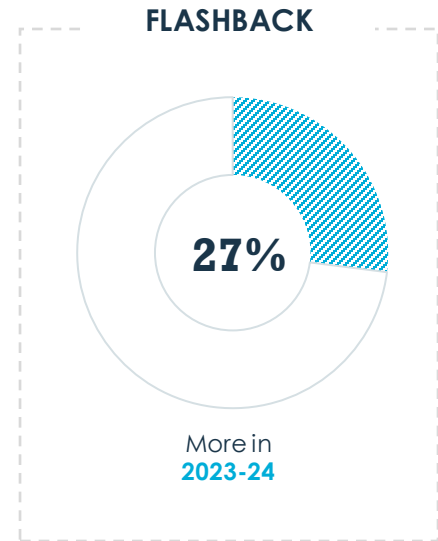
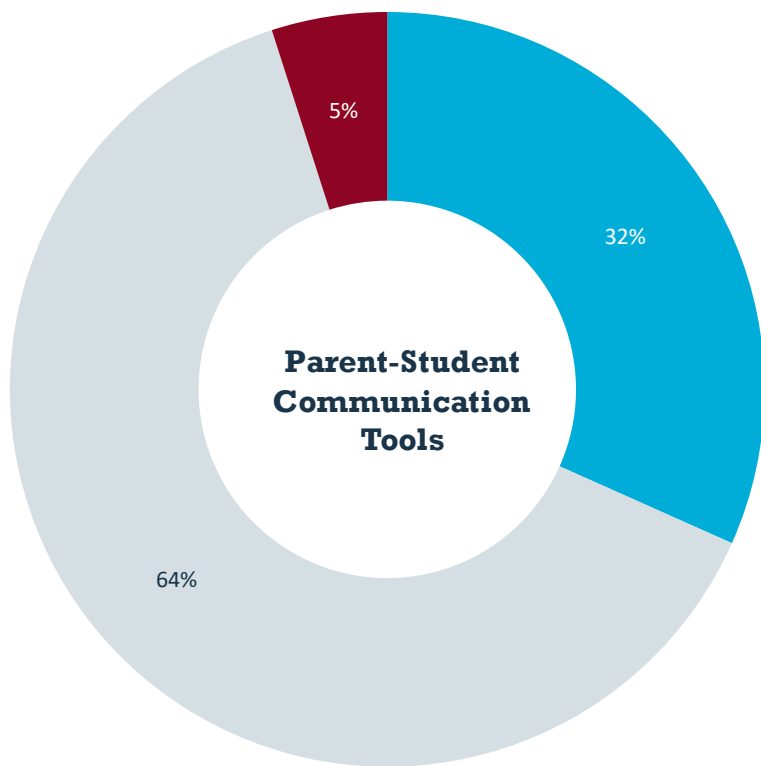
**INSIGHT:**  
 Many school systems have invested heavily in out-of-school learning in the years since the pandemic as a learning recovery strategy. EdWeek Market Brief's new survey shows that investment holding steady, an interest probably driven in part by a continuing focus on the academic rebuild.

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# Spending on Parent/Student Communication Tools Likely to Rise Slightly

■ More in 2024-25   ■ No change   ■ Less in 2024-25



Totals may not add up to 100% due to rounding.

**INSIGHT:**

Many school-to-parent communication platforms took hold during the pandemic, as remote learning became the norm. There is still strong demand for those platforms, as families look for information about their children’s academic progress, scheduling, and other insights.

**Survey Question:**

When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR’S budget (2024-25) will compare to the spending in the current (2023-24) budget?

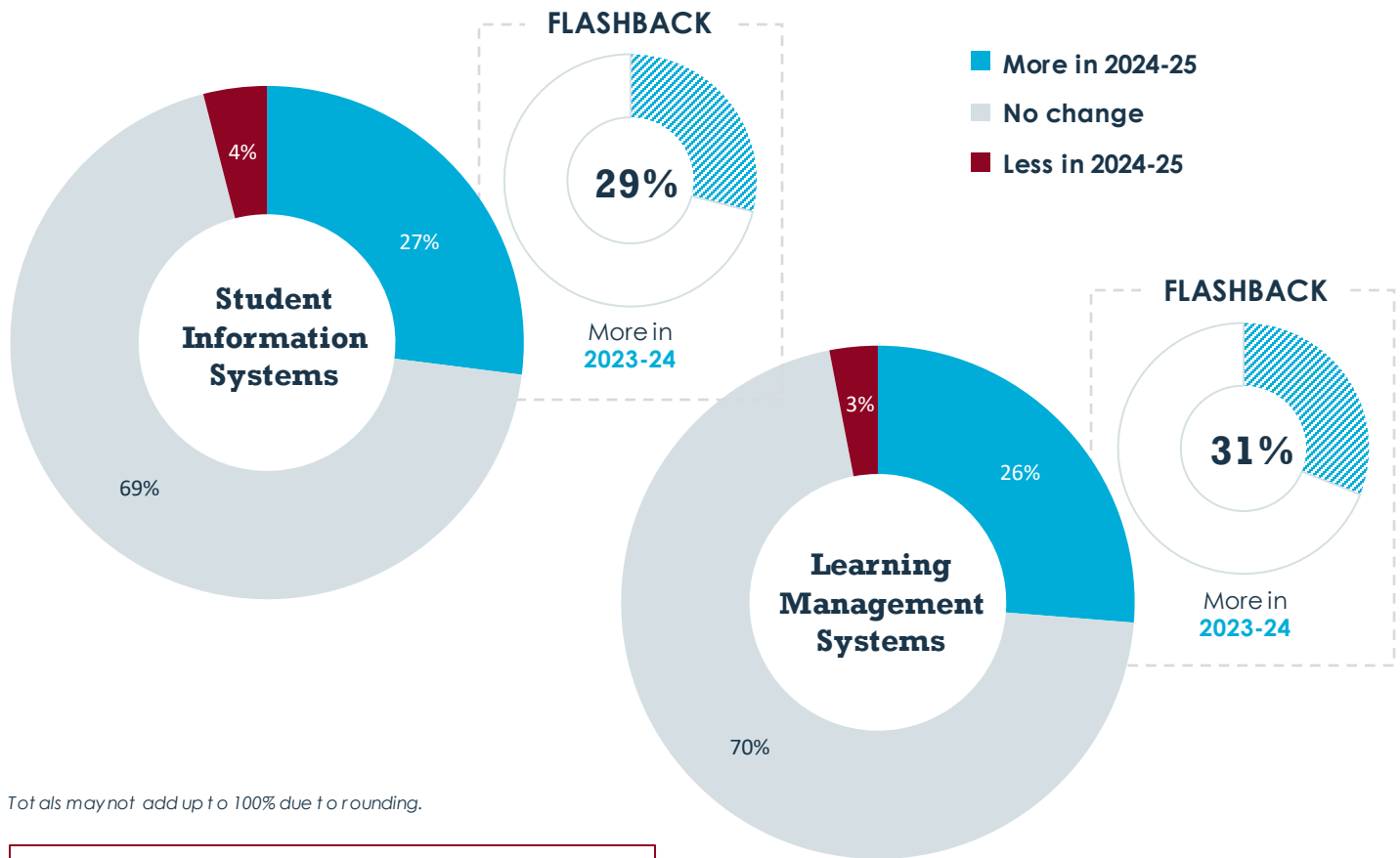
**Link to relevant story:**

- <https://marketbrief.edweek.org/market-trends/case-study-one-education-companys-plan-crack-homeschool-market>

SOURCE: EdWeek Research Center August 2022 nationally representative survey of 231 district leader and 295 school leaders.

SPENDING BY PRODUCT CATEGORY

# Projected Spending on Student Information, Learning Management Systems Will Dip Slightly Compared to Current Year



Totals may not add up to 100% due to rounding.

**INSIGHT:**

School systems' plans to invest in major tech management systems remain relatively stable next fiscal year, though LMS spending will fall somewhat. It could be that districts became cognizant of a need to overhaul their management systems as digital usage soared during and after the pandemic—and that they chose to invest heavily then, and thus don't need to spend as much over the coming year.

**Survey Question:**

When it comes to the following technology-related expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

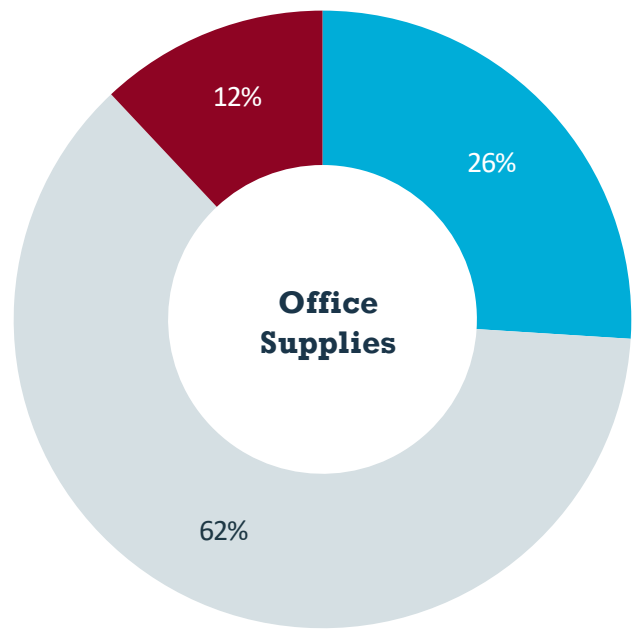
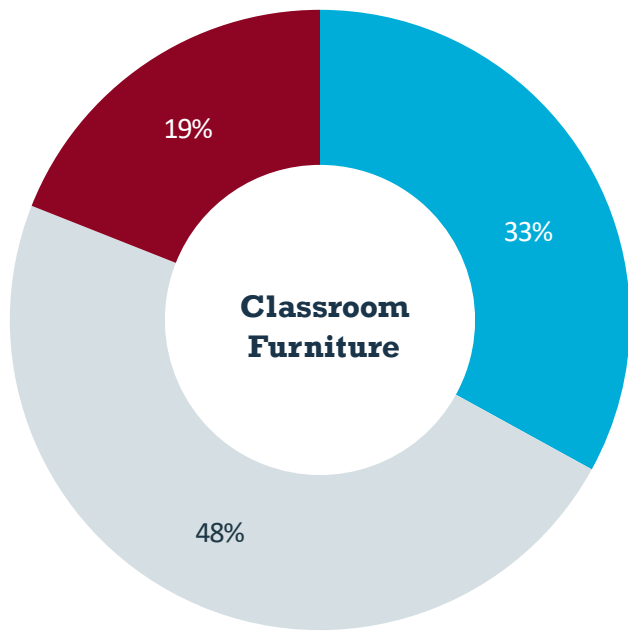
**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/devices-internet-upgrades-districts-will-buying-next-year>

SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

SPENDING BY PRODUCT CATEGORY

# One Third Expect to Spend More On Classroom Furniture; A Quarter Expect To Spend More on Office Supplies



■ More in 2024-25    ■ No change    ■ Less in 2024-25

**INSIGHT:**

A third of district leaders surveyed say their systems will spend more on classroom furniture than they are in the current year, and spending on office supplies is not far behind. This spending could be tied to broader construction projects in K-12 systems, and there are signs that 2023 was a good year for those investments. The Amos Group estimates that voters approved \$80 billion in bonds nationwide last year, a big number for a non-election year.

**Survey Question:**

When it comes to the following expenses, how do you anticipate your spending for NEXT YEAR'S budget (2024-25) will compare to the spending in the current (2023-24) budget?

**Link to relevant story:**

- <https://marketbrief.edweek.org/analysts-view/voters-approve-dollars-school-bonds-here-will-affect-market-2024>

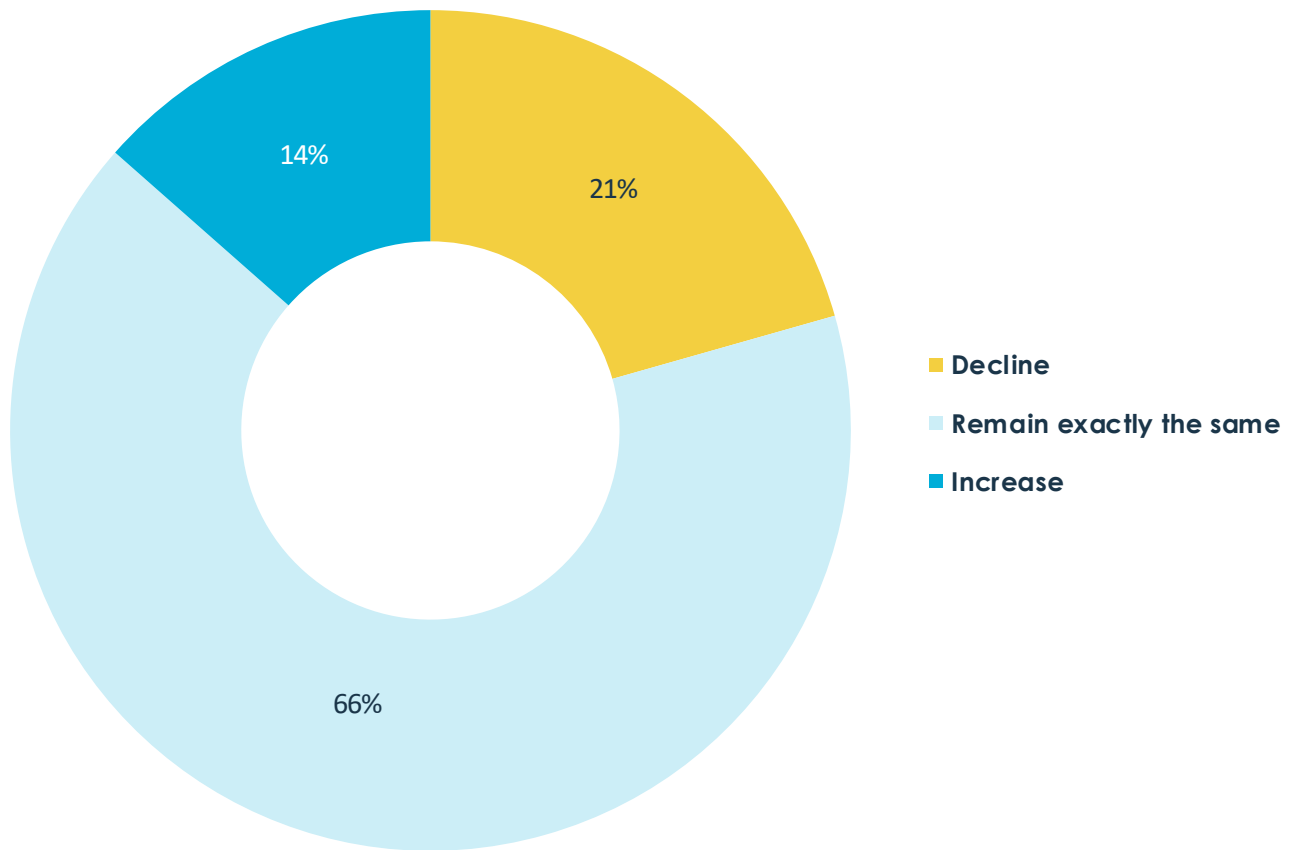
SOURCE: EdWeek Research Center August 2023 nationally representative survey of 161 district leaders.

# Buying Processes And Funding Streams



BUYING PROCESSES AND FUNDING STREAMS

# K-12 Officials Believe Length Of Contracts Will Shorten Over Next 1-2 Years



Totals may not add up to 100% due to rounding.

**INSIGHT:**

A greater percentage of school system leaders expect the length of their contracts to shorten, rather than increase over the next two years. This could reflect some school districts' desire to scrutinize spending on products and programs more often, as federal stimulus money expires and districts become even more focused on return on investment.

**Survey Question:**

Over the next two years, I expect the length of time our vendor contracts will cover will:

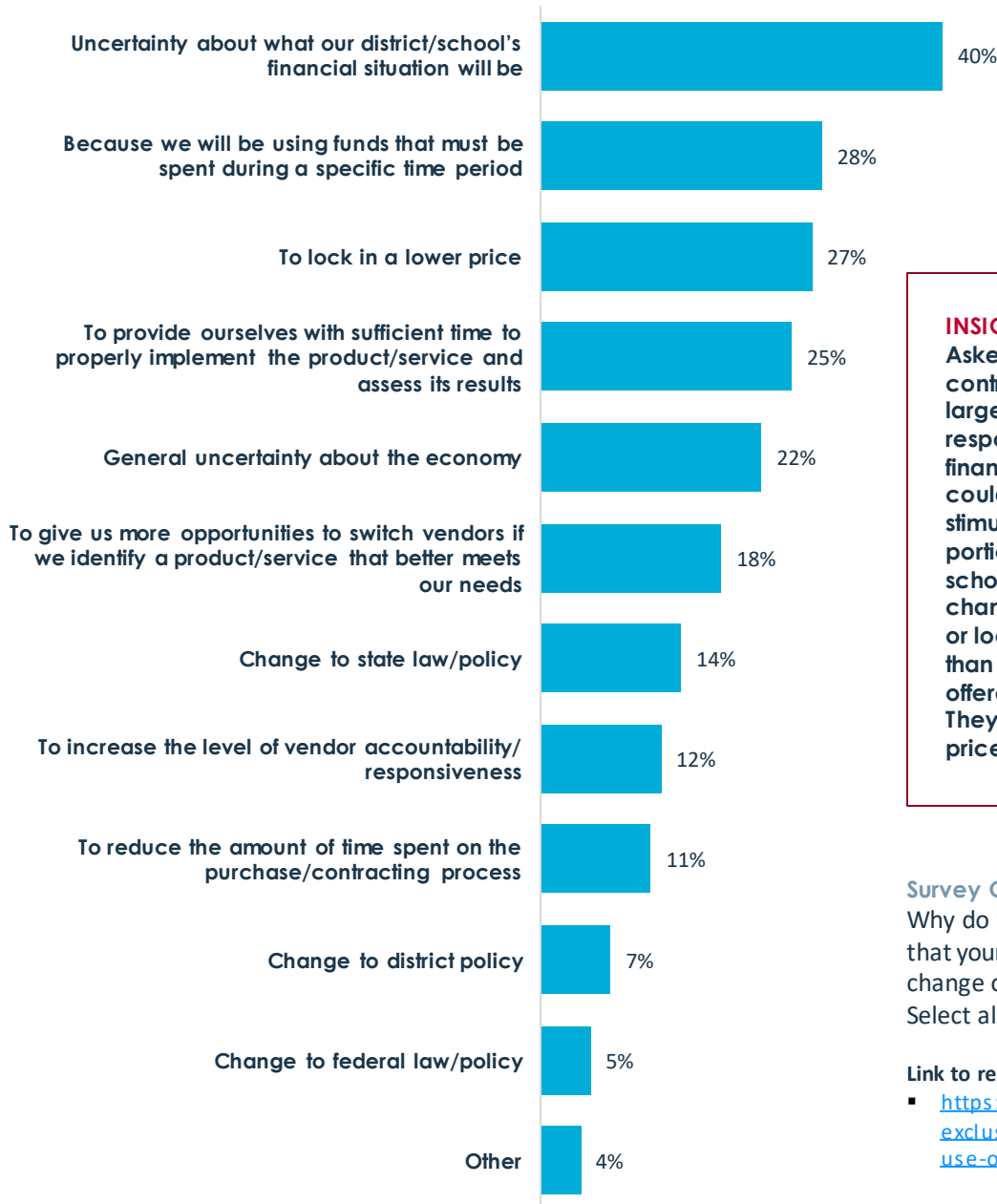
**Link to relevant story:**

- <https://marketbrief.edweek.org/market-trends/7-ways-education-companies-fail-homework-districts>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# Why Shorter Contracts? Uncertainty About Future Financial Picture, And Pressure to Spend



**INSIGHT:** Asked why the lengths of contracts will shorten, the largest share of K-12 respondents point to future financial uncertainties—which could be a nod to expiring stimulus dollars. Only a small portion of the district and school leaders say the change was a result of state or local policy changes. More than 1 in 4 respondents offered a practical reason: They want to lock in a lower price.

**Survey Question:** Why do you expect the length of time that your vendor contracts cover to change over the next two years? Select all that apply.

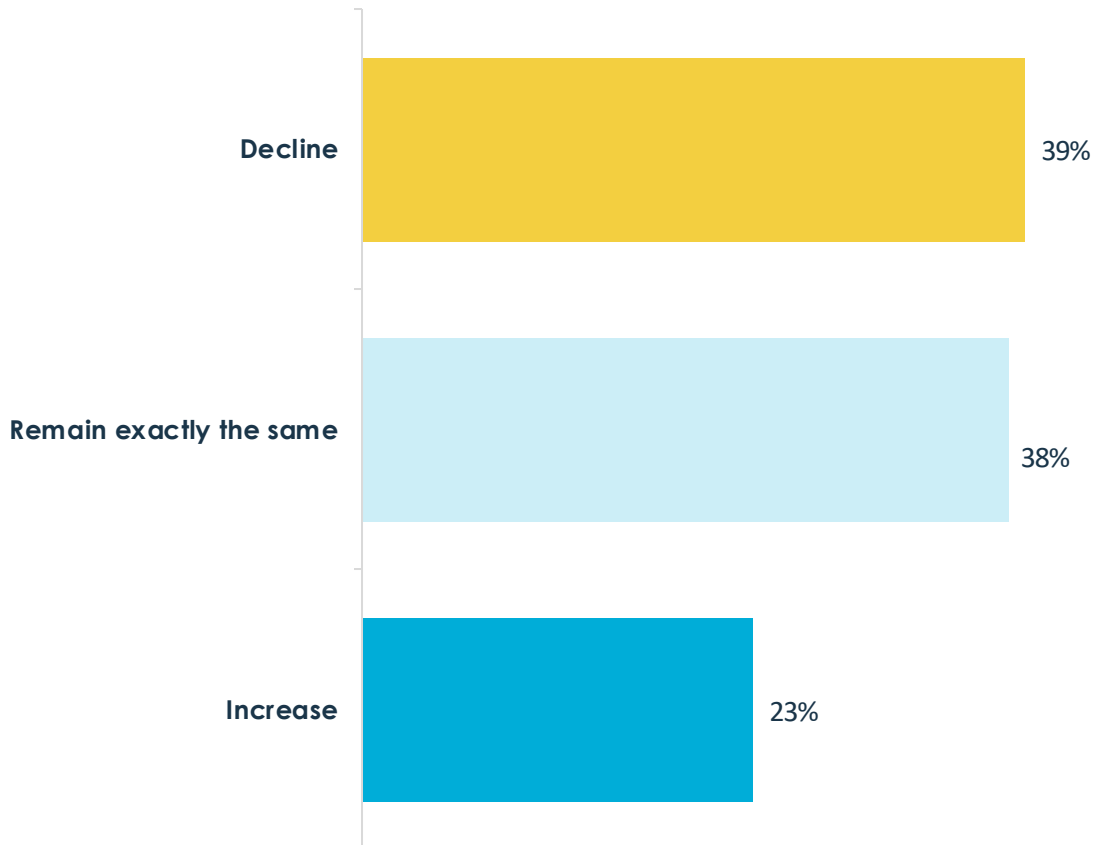
**Link to relevant story:**  

- <https://marketbrief.edweek.org/exclusive-data/common-school-districts-use-outcomes-based-contracts-vendors>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# Nearly 4 in 10 District Officials Foresee Fewer RFPs in Years Ahead



Totals may not add up to 100% due to rounding.

**INSIGHT:**

More district and school officials expect the number of RFPs they put forward to decline rather than increase over the next few years. It's unclear whether this means they will do less overall buying, or if they will be seeking out smaller-scale purchases that fall below the threshold for which they're required to seek a bid. (Among district leaders, specifically, crosstab data show that the portion predicting a decline in RFPs was even higher, 43 percent).

**Survey Question:**

Over the next two years, I expect the percentage of purchases that my district makes using requests for proposals [RFPs] to:

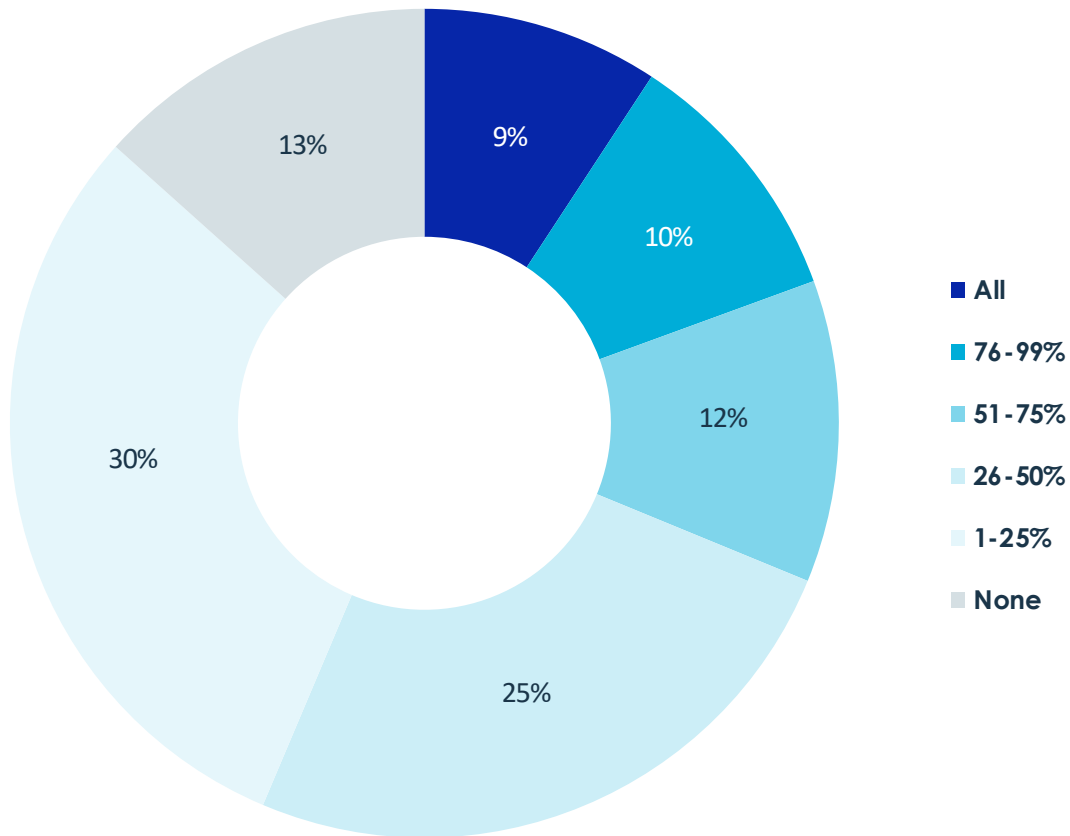
**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/new-era-rfps-education-companies-need-know-virtual-bidding>

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# How Much Scaling Back of Pandemic-Era Purchases Will U.S. School Districts Do?



Totals may not add up to 100% due to rounding.

**INSIGHT:**

More than 3 in 10 district and school officials surveyed say they will cut completely or scale back more than half of their stimulus-funded programs and products. But what's encouraging for vendors: 43 percent of the district officials surveyed say they will eliminate or severely reduce NONE or no more than a quarter of programs supported with emergency aid—suggesting K-12 officials expect those investments to have a long-term place in their schools.

**Survey Question:**

What percentage of programs/projects funded in part with federal stimulus funding do you anticipate your district ENDING or substantially scaling back when all of that federal aid is gone?

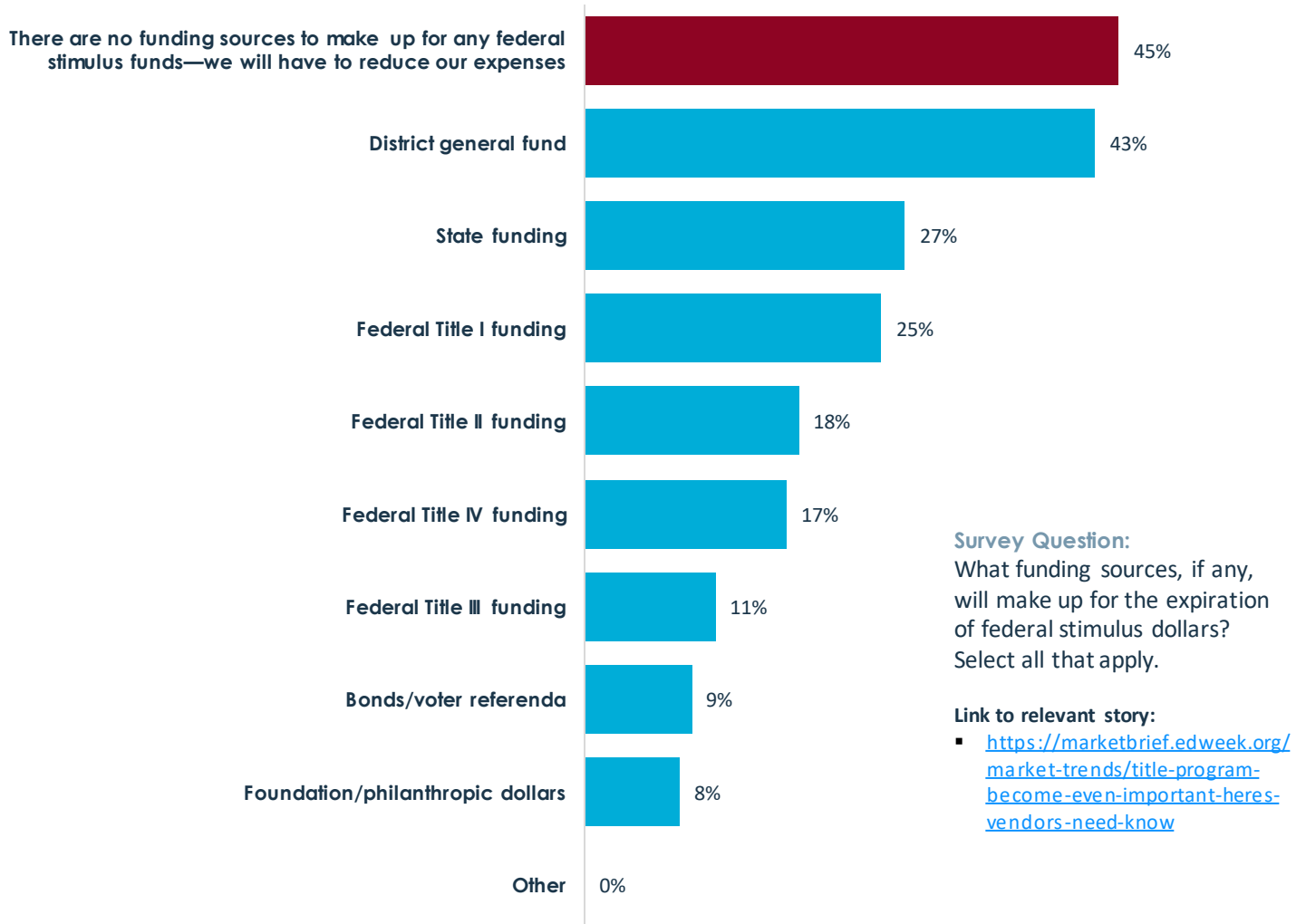
**Link to relevant story:**

- <https://marketbrief.edweek.org/k12-insider/one-districts-anxieties-priorities-esser-funding-expires>

SOURCE: EdWeek Research Center nationally representative December 2023 survey of 266 district leaders and 160 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# When Stimulus Aid Expires, What Are U.S. Districts' Next-Best Funding Sources?



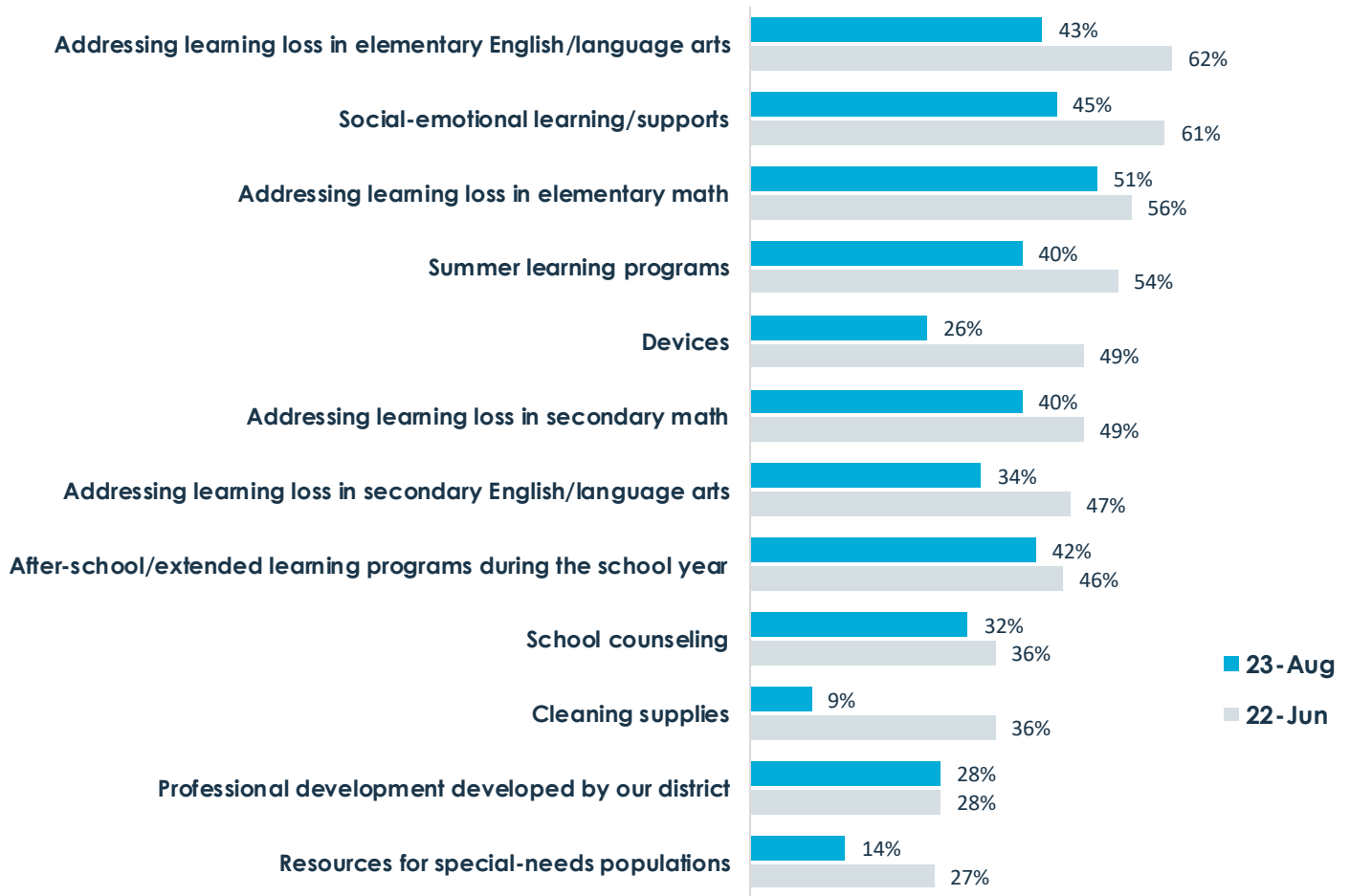
**INSIGHT:**

Asked about alternatives to stimulus aid, the largest portion of respondents point to general fund dollars, which suggests that there will be a new level of competition within core district budgets. The federal Title program are also seen by K-12 officials as another option. Title I traditionally offers districts and schools broad flexibility in channeling money to different academic and non-academic priorities. Title I is a program that supports districts/schools with large portions of impoverished students; the federal stimulus program is also weighted to support poorer school systems.

SOURCE: EdWeek Research Center nationally representative March and April 2023 survey of 277 district leaders, 185 principals, and 401 teachers.

BUYING PROCESSES AND FUNDING STREAMS

# Stimulus Spending: Focus on Using Aid for Devices Plummets; Learning Recovery Still a Big Priority



**INSIGHT:**

District leaders expect to become less reliant on stimulus aid across many different product categories. But many of them plan to continue to use their share of emergency aid for priorities such as early-grades learning and SEL, two major priorities where school systems are motivated to provide sustained support.

**Survey Question:**

What does your district plan to fund with federal stimulus funding? Select all that apply.

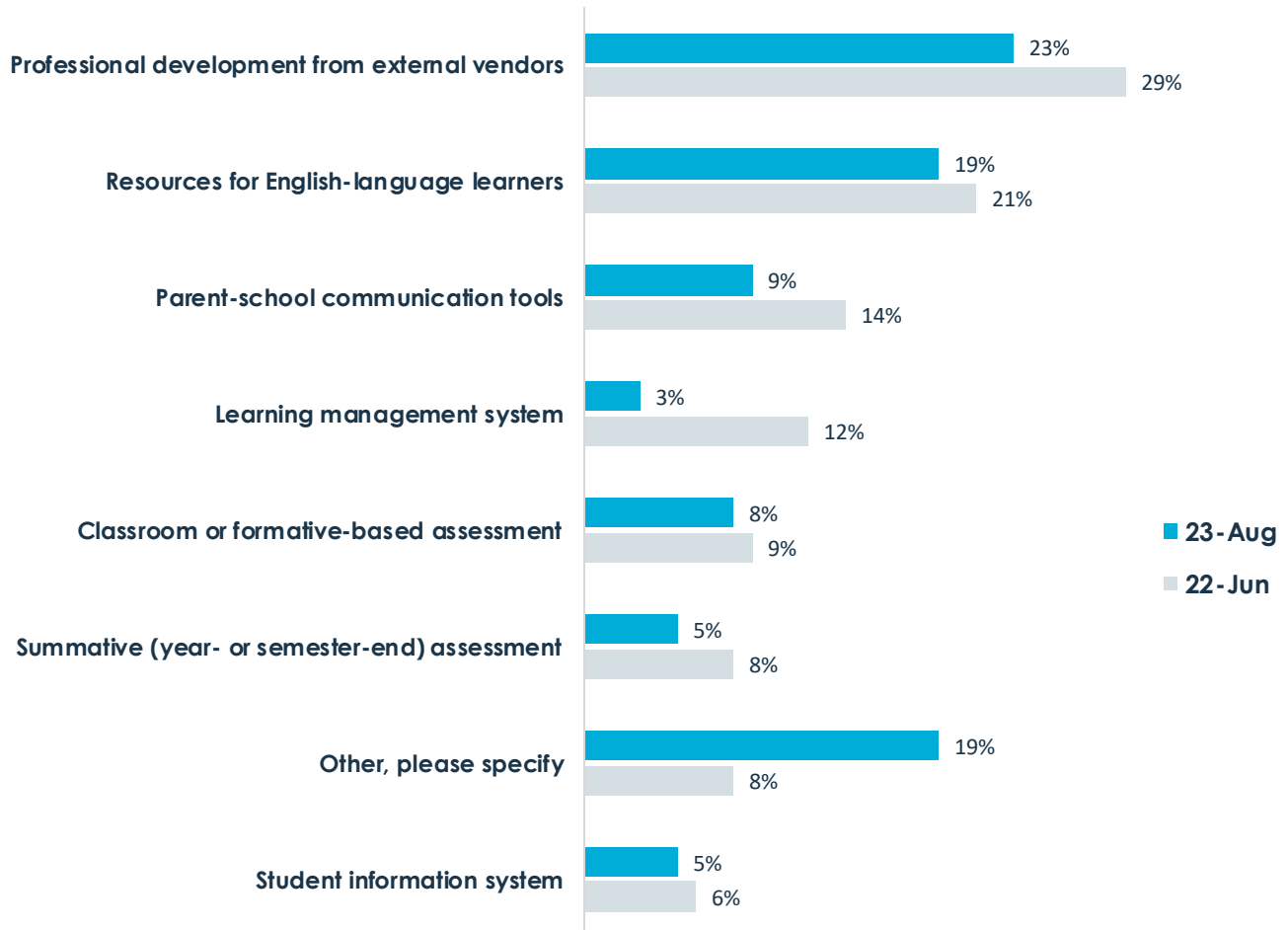
**Link to relevant story:**

- <https://marketbrief.edweek.org/exclusive-data/decision-point-school-districts-will-spend-rest-stimulus-money>

SOURCE: EdWeek Research Center July/August 2023 nationally representative survey of 161 district leaders; June/July of 280 district leaders.

BUYING PROCESSES AND FUNDING STREAMS

# Stimulus Priorities (Continued): External PD Spending Falls Slightly



**INSIGHT:**

School systems' use of stimulus funding for external PD is poised to fall. Training for teachers may lose out when stacked up against learning recovery and other needs. Some of the "other" stimulus spending priorities written in by survey respondents included HVAC and other health and safety improvements, as well as personnel costs—which have represented a big chunk of some districts' emergency spending to date.

**Survey Question:**

What does your district plan to fund with federal stimulus funding? Select all that apply.

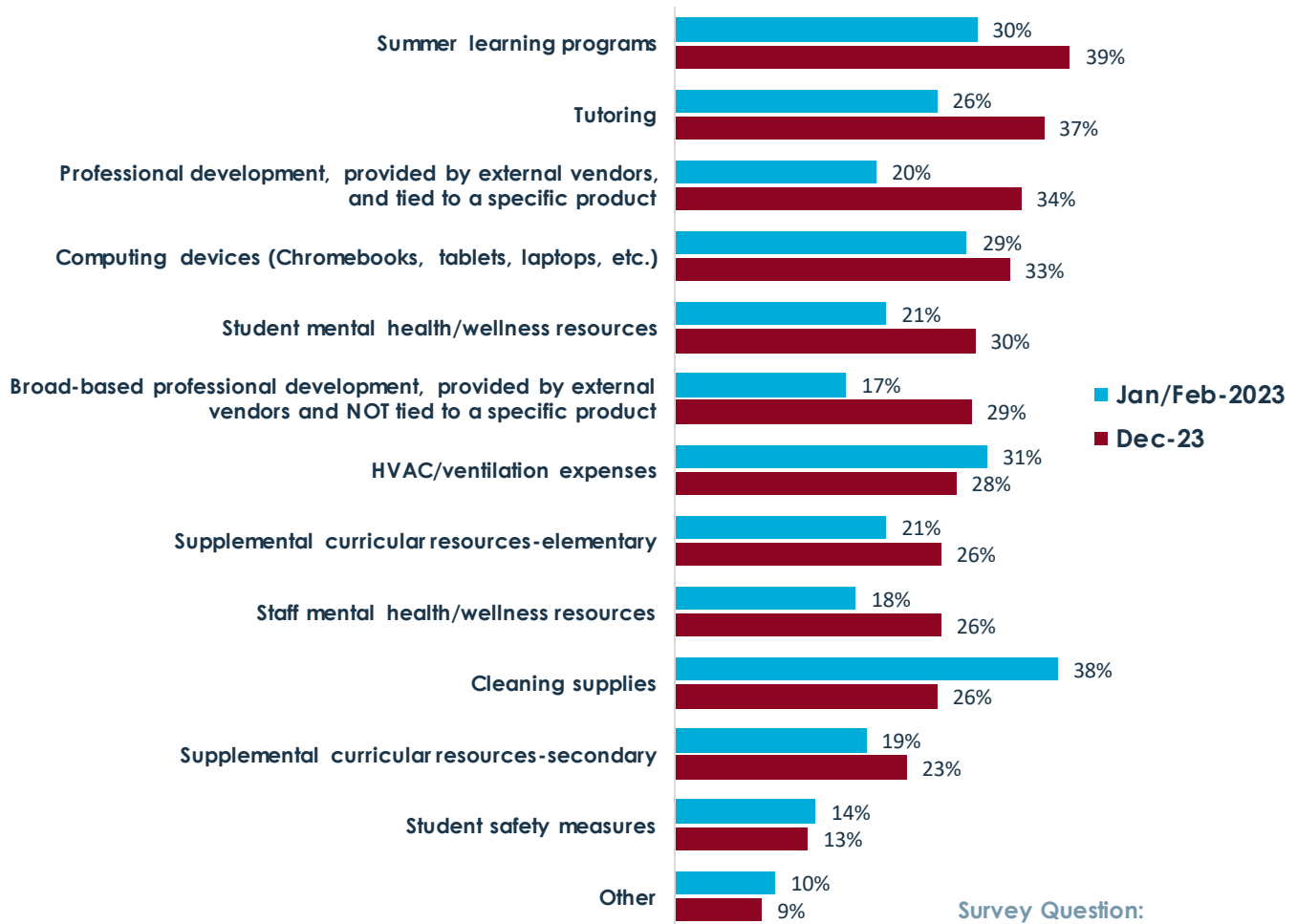
**Link to relevant story:**

- <https://marketbrief.edweek.org/>
- [marketplace-k-12/teachers-colleges-pressed-commit-improving-future-educators-tech-skills](https://marketplace-k-12/teachers-colleges-pressed-commit-improving-future-educators-tech-skills)

SOURCE: EdWeek Research Center July/August 2023 nationally representative survey of 161 district leaders; June/July of 280 district leaders.

BUYING PROCESSES AND FUNDING STREAMS

# Which Products/Services Are U.S. Districts Looking to Scale Back, as the Stimulus Ends?



**Survey Question:**

In the next year, which categories of products purchased with pandemic stimulus aid are you likely to reduce spending on as that aid runs out? Select all that apply.

**Link to relevant story:**

- <https://marketbrief.edweek.org/marketplace-k-12/districts-will- pare-nonessential-products-post-stimulus>

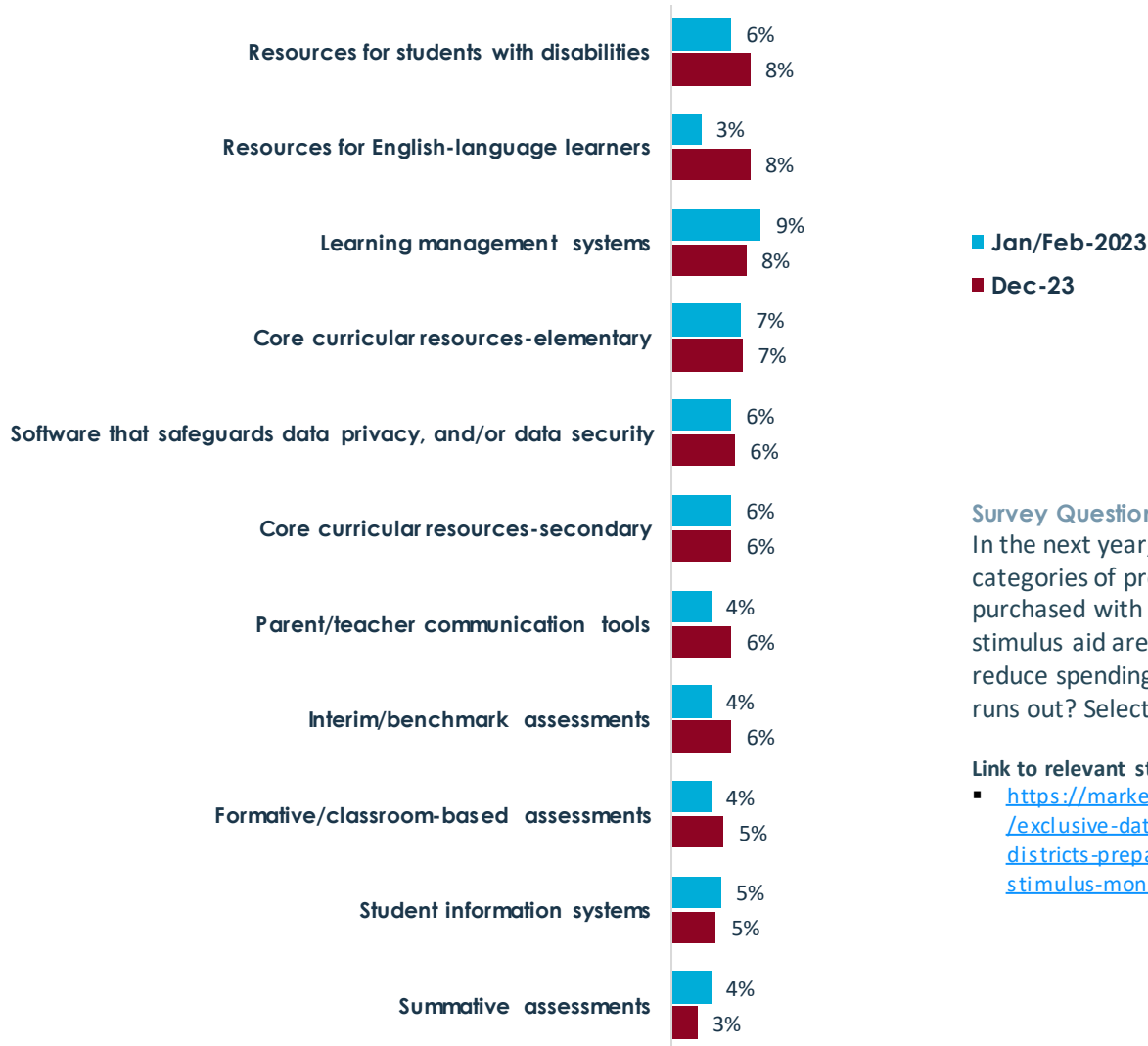
**INSIGHT:**  
 Many of the biggest priorities districts have targeted for stimulus funding—such as summer learning and tutoring—are also those vulnerable to scaling back. Faviola Cantú, the chief academic officer with the Aldine Independent School District in Texas, told companies attending last fall’s *EdWeek Market Brief Summit* that her district will judge them on “how aligned you are with our strategic priorities,” adding: “We’re looking at products that are tied to our values.”

SOURCE: EdWeek Research Center nationally representative surveys, December 2023 of 296 district administrators and 284 school leaders; December 2023 survey of 266 district leaders and 160 school leaders.



BUYING PROCESSES AND FUNDING STREAMS

# The Products/Services Likely to Be Targeted for Cuts (continued)



**Survey Question:**  
In the next year, which categories of products purchased with pandemic stimulus aid are you likely to reduce spending on as that aid runs out? Select all that apply.

**Link to relevant story:**  

- <https://marketbrief.edweek.org/exclusive-data/words-school-districts-preparing-loss-stimulus-money>

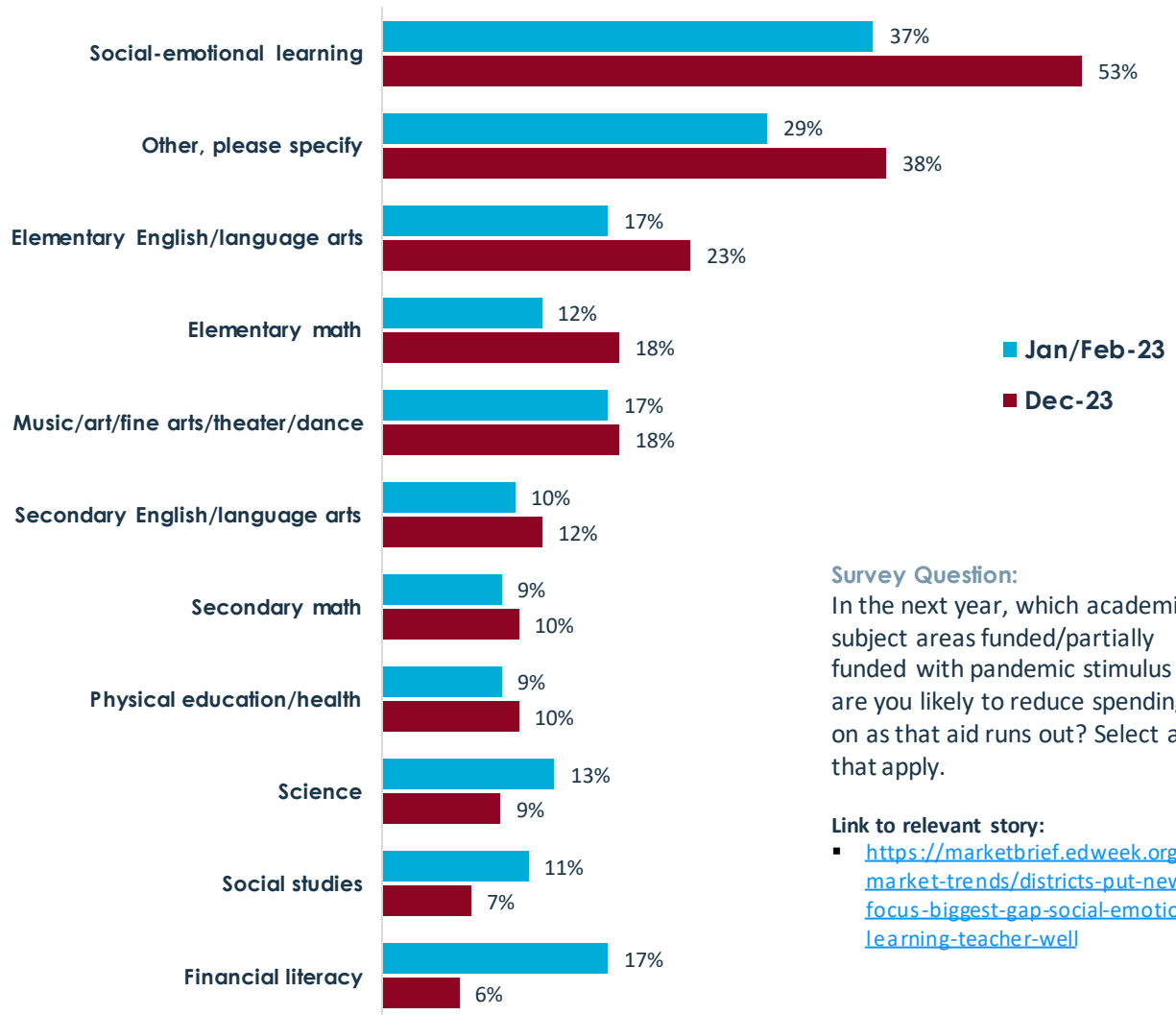
**INSIGHT:**

School systems do NOT appear to be planning reductions in areas like special education and English-language learner support. Some districts, however, may not have any choice. An Oregon district official told EdWeek Market Brief last year that the loss of stimulus money will prompt them to consider “a reduction in force, which leads to fewer options at the high school level and less English-language development staffing.”

SOURCE: EdWeek Research Center nationally representative surveys, December 2023 of 296 district administrators and 284 school leaders; December 2023 survey of 266 district leaders and 160 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# What Kinds of ACADEMIC Programs Will Get Scaled Back? SEL Is One Target



**Survey Question:**  
In the next year, which academic subject areas funded/partially funded with pandemic stimulus aid are you likely to reduce spending on as that aid runs out? Select all that apply.

**Link to relevant story:**  

- <https://marketbrief.edweek.org/market-trends/districts-put-new-focus-biggest-gap-social-emotional-learning-teacher-well>

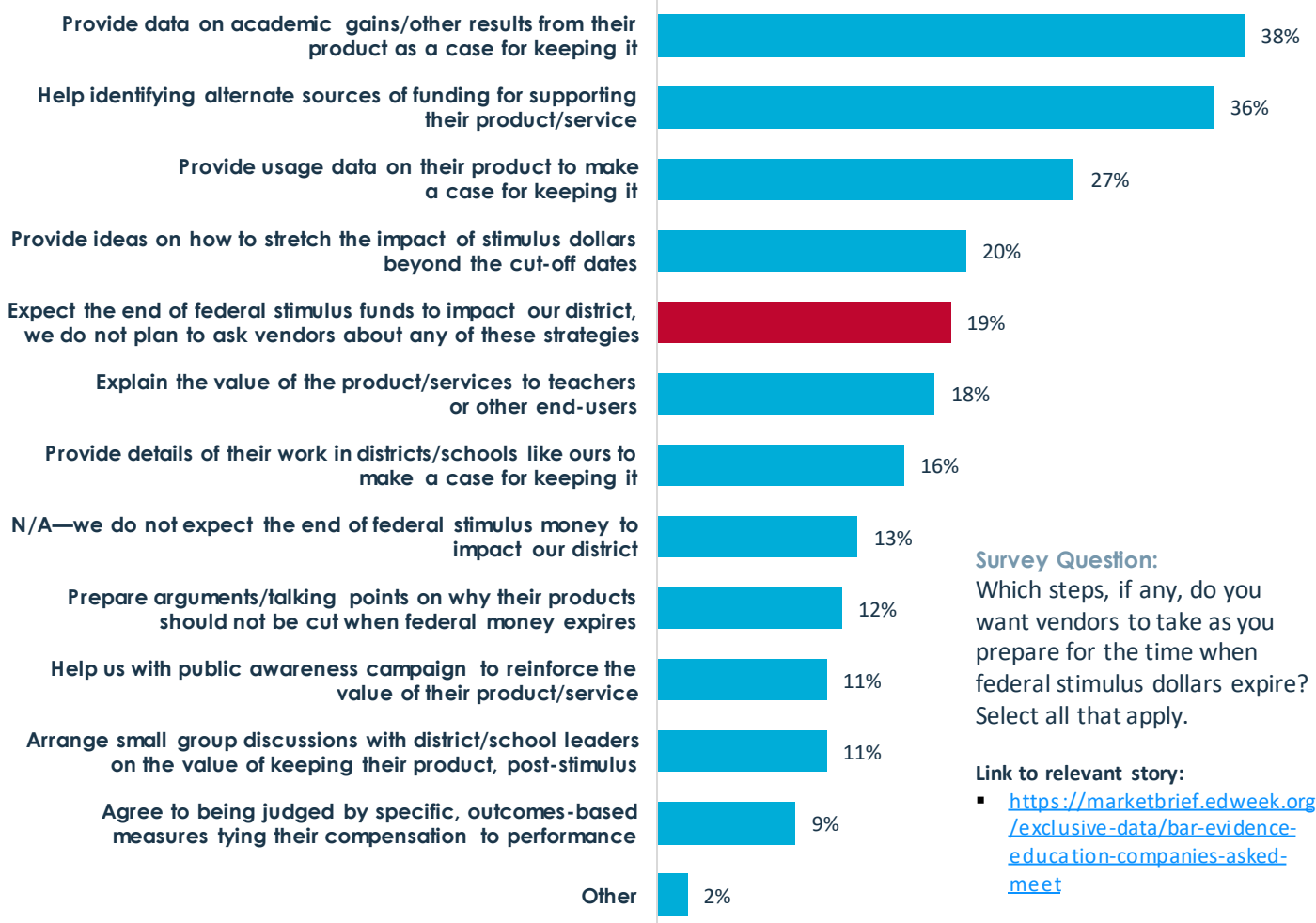
**INSIGHT:**

Building out social-emotional learning programs has been a major focus of school systems, even preceding the student and teacher needs brought to light by the pandemic. With the expiration of stimulus funding, some cutting of SEL programs appears to be coming, though this could simply reflect a return to normal after a few years of heavy investment. Even if the emphasis on social-emotional support declines with the loss of stimulus money, this report finds that SEL, overall, remains a major priority for spending next fiscal year.

SOURCE: EdWeek Research Center nationally representative surveys of 296 district administrators and 284 principals, January/February 2023; of 266 district leaders and 160 school leaders in December of 2023.

BUYING PROCESSES AND FUNDING STREAMS

# Support Districts Want From Vendors As Stimulus Ends: Data Showing Results; Help Finding Alternate Funding



**Survey Question:**  
 Which steps, if any, do you want vendors to take as you prepare for the time when federal stimulus dollars expire? Select all that apply.

**Link to relevant story:**  
 ▪ <https://marketbrief.edweek.org/exclusive-data/bar-evidence-education-companies-asked-meet>

**INSIGHT:**  
 One way, according to the survey, that vendors can be of use to districts as federal stimulus dollars end: They can help K-12 leaders scope out alternate funding sources. One additional finding from the crosstab data on this question is that district leaders are significantly more likely to say they want product usage data (32 percent indicated this) compared to school leaders (22 percent).

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

BUYING PROCESSES AND FUNDING STREAMS

# District Officials' Biggest Concerns About Making Purchases? Cost, Lack of Hard Academic Results



**Survey Question:**  
What, if any, MAJOR purchasing process-related concerns do you expect to encounter over the next two years? Select all that apply.

**Link to relevant story:**  

- <https://marketbrief.edweek.org/exclusive-data/districts-say-value-research-mean>

**INSIGHT:**

Affordability weighs heavily on district and school leaders, when they're asked about their worries about buying decisions over the next few years. So does value for the dollar: District and school leaders are worried about products that either don't produce academic gains, or that sit on a shelf. Relatively few K-12 officials are worried about vendors not living up to their contracts.

SOURCE: EdWeek Research Center nationally representative August 2023 survey of 218 district leaders and 271 school leaders.

## Key Contributors

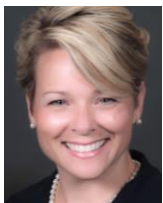
### EdWeek Market Brief



**Sean Cavanagh** is the managing editor of *EdWeek Market Brief*, where he leads a team of editorial staff focused on delivering actionable intelligence about the needs and priorities of school districts to companies and other organizations working in the K-12 market. Before he began working on business and technology issues, he covered a variety of beats for Education Week, including math and science education, charter schools and school choice, state policy, and federal policy. Prior to joining Education Week, he was a reporter for daily newspapers in Tennessee and Florida.



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**Liz Yap** is the lead designer for the report and data visualization.

### EdWeek Research Center



**Holly Kurtz** directs the Education Week Research Center, which produces standalone studies as well as analyses for Education Week and special reports such as Quality Counts. Holly began working at Education Week in 2014 after earning a Ph.D. in 2013 from the University of Colorado at Boulder's School of Education and completing a postdoctoral fellowship at the University of Colorado at Denver's School of Public Affairs. Prior to attending graduate school, she spent 11 years covering education and other topics for newspapers in Florida, Alabama, and Colorado.



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