

# EdWeek Market Brief

Market Trends

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## How COVID-19 Could Change Instructional Materials for Years to Come

*Districts Are Looking for Flexibility, Ease of Use, and Accommodations for Print Demands*

David Saleh Rauf

Contributing Writer



COVID-19 is fueling demands for a new era of instructional materials that are parent- and teacher-friendly and digitally based, but also capable of being delivered both in print and online to users in classrooms and homes.

Those new demands, like others that have emerged during the pandemic, are likely to end up influencing the K-12 market for years to come, even after the coronavirus subsides.

Roughly eight months into the coronavirus outbreak, school districts remain consumed by managing the crisis. Vendors face a similar challenge, and are being forced to tailor solutions to whatever learning plan districts are using.



*The pandemic has stirred an appetite not only for more digital products, but also for resources that can mesh easily with others already in use in schools*

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More schools have reopened buildings and are forging forward with in-person instruction. At the same time, some districts — including [New York City, the nation's largest](#) — are now sending students back to at-home remote learning, as COVID cases spike.

The confusing landscape has left education companies scrambling, but many see changes in the marketplace for instructional materials that are here to stay.

“The bottom line is we are still learning, and adjusting to district needs. There have been a lot of lessons learned since the spring,” said Ileana Rowe, senior vice president of marketing at [Voyager Sopris](#). “In the end, school districts expect you to not only be nimble but completely rethink the way you are delivering products.”

Over the course of the year, vendors have been consistently updating their offerings, in some cases digitizing volumes of lessons originally designed for synchronous classroom instruction, and launching new products aimed at boosting the use of digital resources.

The main product focus, across the board, now and moving forward, is tailoring instructional materials for blended learning — combining virtual and face-to-face lessons.

Education companies are also mixing gaming and animation into solutions to try and keep students engaged.

Amid a flurry of forced infrastructure spending, ranging from [device purchases](#) to districtwide learning app licenses, schools are expected to be less reliant on print materials. But vendors agree on this much: Print is far from dead, even if post-COVID classrooms are much more digitized.

And overall, curriculum providers are realizing that if they weren't already highly focused on meeting parents' needs, they have to be now.

In the new environment, "what teachers, schools and parents want and need is flexibility," said Stuart Udell, CEO of [Achieve 3000](#). "The lesson we're learning during COVID, even though they're really hard ones, are equipping us as an industry to do monumental things moving forward."

## 'Rocket Fuel' for New Products

Providers of instructional materials have already made no shortage of adjustments to the realities imposed by the coronavirus.

Udell said his company, which provides a literacy platform that delivers adaptive, differentiated instruction, started building into its products a variety of engagement tools, such as pre-and-post-lesson polling. Achieve 3000, he said, is now thinking about adding more game-based components to middle school and high school products over the next year.

One change that might appear simple on the surface, Udell said, but was far from it, involved creating new functionality within products to enroll a single student in more than one classroom to facilitate a mix of in-person and online learning.



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## nimble but completely rethink the way you are delivering products.

*Ileana Rowe, senior vice president of marketing, Voyager Sopris*

“We had hundreds of districts come to us and say, ‘we need to be able to assign a kid to multiple classes even within the same subject,” said Udell, whose company added 2 million users to its all-digital platform during the pandemic. “That’s all flexibility we had to code into the system on a dime. We never had an environment in the past that created that question for us to answer, and it turned out to be a significant one.”

Likewise, [BrainPOP](#) is also moving forward on a product launch this fall that allows co-teachers in a class to start taking part in online learning more fully, said Karina Linch, chief product officer.

“This is for teachers that are traditionally left out on the margins,” Linch said, “like specialists or an ELL coach, so that they’re able to have equal access to student accounts as well.”

Rowe, the senior vice president of marketing at Voyager Sopris, which offers math, literacy, professional development and assessment tools to K-12 schools, said “every product now needs to be thought through the lens of multiple delivery and support models.”

To that extent, the company has launched a new online reading program, and is preparing to release in January additional resources to support blended learning based on it’s K-5 literacy intervention, [Voyager Passport](#).

And [Houghton Mifflin Harcourt](#), the Boston-based publisher, education content-provider and technology company, started integrating its products with popular video conference platforms when schools shut down over the spring, said Matthew Mugo Fields, who leads development and strategy of the company’s supplemental and intervention solutions.

Since then, the company has added “rocket fuel” to its product development in trying to make sure the wide array of digital solutions district officials use are connected — what Fields described as “teacher connectivity systems.”

“We do believe K-12 education is forever changed,” said Fields. “You have teachers and educators now getting value from these digital solutions they weren’t experiencing before.”

“They’re not going to sacrifice that in the future, even when in-class instruction returns, because there are certain things that software has proven it can do well in in assistance to teachers.”

## District's Biggest Social-Emotional Learning Needs

*EdWeek Market Brief* recently surveyed district and school administrators about their most urgent needs for SEL-focused products and services. Our members can access the special report detailing the results [here](#).

## Print Endures Despite ‘Digital Takeover’

While HMH has been heavily focused on print-based learning materials in the past, with digital as a complement, the balance has changed, Fields said.

Now, the “digital experience is more of the home base,” he said.

Usage of the company’s digital resources is up nearly 400 percent this year, resulting in more than 6 million new users. Yet Fields says print isn’t going anywhere, even if its role is somewhat diminished.

“There will always be some demand for print, but most of that demand for print will be tied to an increasingly digital experience,” he said. “There’s still a *New York Times* print paper produced everyday, even though the online and app experience has become more robust. We think that’s a parallel for what’s likely to happen in education.”

Curriculum provider [Great Minds](#) not only continues to get plenty of requests for print materials — one of the biggest complaints the company received recently was when links to print materials accompanying digital lessons temporarily did not work during the spring, said CEO Lynn Munson.

While there has been plenty of talk of a “digital takeover” for some time in K-12 education, companies have yet to provide solutions that would make teachers want to get rid of all their print resources, she said. Great Minds develops and publishes an

open educational resource curriculum, and generates revenue by selling add-on products, like print versions of the curriculum.

Munson highlighted the necessity for print materials in lab experiments, and in math classes. She also pointed to a concrete example of a big school district, the Baltimore school system, buying more print materials from Great Minds after making an initial investment.

She envisions a post-coronavirus landscape where classrooms dedicate about 60 percent of their learning resources to digital tools.

“There is still an extraordinary interest in print products,” she said.

Udell, the CEO of Achieve 3000, said even though his company is an all-digital offering it has had requests for downloadable print products in cases where students lack connectivity.



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*Matthew Mugo Fields, General Manager, Supplemental and Intervention Solutions, Houghton Mifflin Harcourt*

Yet the slow migration over the last decade from print to digital has accelerated since the outbreak, and he predicts there's no going back now.

“There certainly is room for print if you think about math or literacy, some subjects require a tactile experience. But I don't think we'll be running back to it,” he said. “I just cannot see a world where more than 20 percent of a district's spending is on published materials in the next five years.”

## Helping Parents, and Not Just in English

Marty Creel, chief academic officer for [Discovery Education](#), said his company has found that providing “more support for parents is probably the area of growth we’re looking at the most.”

One of the company’s immediate responses to COVID-related school closures was to create about six weeks of pre-packaged lessons that parents could handle on their own.

“More and more as we’re developing content, we’re thinking about how we really turn this into something a parent can use,” he said. “There’s going to be more demand from parents for high-quality digital content.”

To help non-English-speaking parents, Discovery Education is offering Spanish-language videos or transcripts. Gearing products towards parents in that regard is a “deepening and accelerating trend,” Creel said.



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*Marty Creel, Chief Academic Officer, Discovery Education*

At BrainPOP, the company has also met increased requests for materials that help parents by translating a number of learning resources into other languages, said Linch, the chief product officer.

“Parents are going to have much higher expectations for ed-tech products,” she said. “I don’t think they will recede from that position.”

And at HMH, the company released a tool called “[Family Room](#),” to give parents access to information about what students are working on.

Benjamin Heuston, CEO of the [Waterford Institute](#), an adaptive early reading, math, and science curriculum with integrated assessments, said vendors and educators have

long known that what happens at home is crucial for academic success. But the pandemic has put a spotlight on just how important parents are in the learning process, he said.

"Today, that is front and center," he said. "I hope when we rebuild on the far side of this COVID-19 tunnel, we are much more inclusive of parents and supportive of their roles."

## 'Cracking The Code'

Moving forward, as districts adopt more tech tools, vendors say they expect administrators to start seeking more interoperability between platforms as one of the hallmarks of a post-COVID era.

Right now, teachers are using a lot of different digital curriculum tools as they still get familiar with full-time online or hybrid learning. And those tech tools — ranging from assessment and teaching platforms to a universe of learning apps — don't always connect with each other in a manner that produces meaningful results for educators.

Mugo Fields, who leads development and strategy for HMH's supplemental and intervention solutions, said it's not enough for teachers to access all their digital tools from the same place. It's about the "underlying data that gets shared in the solutions," he said.

That's why HMH is focused on making sure solutions are "connected and talking to each other," he said.

"When teachers deal with disparate apps, one might tell them that a student is at a certain level and another might say a student is at another level. Which is the truth? You really don't know," Fields said. "It's great there's been an explosion of use of ed-tech. But not so great is the explosion of disparate solutions that has made it tough for everyone."

Heuston of the Waterford Institute, the provider of tech-based early learning literacy products, said he expects to see districts increasingly say "we don't want to deal with all of this. You have to plug into our student information system. We're not going to support a system for every individual app."



In that scenario, he said, the expectations for publishers and curriculum providers “is just going to keep going up,” and districts will require vendors to “check all those boxes.”

“Those are just the table stakes. The cost to play in this ocean is getting raised every year,” Heuston said. “People are racing to build digital platforms and LMS’s that connect this sort of stuff. I’m not sure anyone has really cracked the code on delivering to schools what they want.”

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**David Saleh Rauf** David Saleh Rauf is a contributing writer with EdWeek Market Brief.  
Contributing Writer

✉ [drauf@educationweek.org](mailto:drauf@educationweek.org)

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6935 Arlington Road, Bethesda MD 20814 - 1-800-346-1834