TIP SHEET

Top Tips for a Successful SIS/LMS Implementation in K-12 Schools

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When your K-12 school is considering the transition to a new Student Information System (SIS) and Learning Management System (LMS), whether choosing Blackbaud software solutions or not, it's essential to engage the right stakeholders and plan ahead for the implementation and launch of that new software. Implementing new SIS and LMS systems is a significant undertaking, and following these tips will help make the process as smooth as possible.

(1) ### Create an implementation team.
Best practice is to select a small committee of school administrators and teachers who are accountable for the overall implementation process and day-to-day task setup.

- Appoint a project leader who will attend all of the SIS/LMS consulting sessions and maintain responsibility for keeping the entire implementation on track.

- Establish one or two staff members to be topic experts on each SIS/LMS feature that your school is planning to use. When working with Blackbaud, you'll want them to attend the appropriate Blackbaud University classes so they can lead the training sessions that pertain to their areas. For example, consider breaking up the workload like this:

  - **Academic group setup and grading**—the registrar, academic dean, or even the college counseling and guidance staff

  - **Class pages and gradebook setup**—the academic technology coordinator or a few teachers who are already successfully using technology in their classes and are willing to help train others

  - **Attendance**—the attendance managers or front-desk staff (i.e., the people responsible for attendance each day)

  - **Schedule**—the scheduler or scheduling team

  - **Team page setup and athletic management**—the athletic director or staff

  - **Medical**—the school nurse

Having knowledgeable go-to people at the school involved in the implementation process will help instill confidence internally and create buy-in among other faculty and staff. It will also ensure that your software provider has the right people available to provide accurate information to critical software setup questions.

2 Engage your school's faculty.

It's crucial for teachers to feel like partners in the SIS/LMS implementation and launch. If you engage them early and prepare them well, they will become your best ambassadors.

- Share the decision to make a change to a new SIS/LMS as early as possible. Let them ask questions, raise concerns, and give input. Involve teacher representatives in the vendor review and selection process. They will be using your new SIS/LMS every day, so you want them to be engaged and on board.

- Discuss current LMS use (if any) as well as any other classroom technology tools. Determine the technology needs that will be met by the new SIS/LMS and which may not. Address any potential gaps collaboratively.

- Ask for volunteers to be early adopters. Send them to training classes and get them set up with their class pages as early as possible. Let them test, play, and ask questions. Their experience will help you determine how to train the rest of the faculty.

- Give the remaining teachers access to the SIS/LMS as early as possible so they can get comfortable using the software. Let them start on the current year's pages. Offer training sessions before the end of school and follow up with optional summer workshops and refresher sessions at opening meetings and in-service days.

- Set clear, reasonable expectations for class page use in the first year and provide teachers as much time as possible to create the necessary content before school starts.

3 Prepare your school's data.

A large part of the implementation process involves migrating data from your current system to the new SIS/LMS. Make this as easy as possible by preparing ahead.

- Audit your school's current constituent contact card data. Is it accurate and up-to-date? Will you pull it from a single source or multiple databases? How much cleanup is necessary? If the answers to these questions are cringe-worthy, start the cleanup process early, well before you need to prepare your import files for the new system.

- If a historical transcript grade import is part of the new implementation, audit the current student grade data. Will you need to scrub it to ensure it is accurate and complete before importing it?

- Make a plan for generating and storing historical data that won't get imported, such as alumni and past student transcripts and historical report cards, so it's easily accessible going forward.

- Talk to your teachers about the changes that are coming. Give them plenty of time to gather any materials from your current LMS (if applicable). This step is especially important if your current LMS contract is expiring and teachers will lose access.

4   Support your school's students and parents.

Make a plan to introduce students and their families to the new SIS/LMS and ensure they know how to use it going forward.

- Announce the change as soon as you can and tout the benefits to get families excited for the new system.

- Invite parents to log in for the first time (provide clear steps) before school starts. Be available to support and troubleshoot if needed. Provide screenshots, how-to documentation, and videos to show parents how to navigate around the new site (post these as resources behind the password).

- If applicable, make a plan for guiding students through the initial login, navigation, and functionality. Schools often see success when doing this as part of an orientation program, homeroom agenda, or advisory meeting.

- Provide ongoing training, resources, and support for student SIS/LMS use, ideally as a team effort involving classroom teachers, advisors or guidance counselors, and IT or academic staff. By showing students how to get the most out of the SIS/LMS, they're more likely to use it well and help train their families.

5   Be open to change.

Even with careful planning, the transition to a new SIS/LMS solution can be challenging when getting all the different facets to fall into place. Be prepared for this reality and stay positive.

- Trying to create an exact replica of your school's old software setup is a recipe for frustration. Instead, focus on the new solution and keep the big-picture needs of your school, students, teachers, and families at the forefront when encountering change. Remember, there's a reason your school is upgrading its SIS/LMS solutions, and rethinking or refreshing methodologies is an excellent exercise for any team.

- Anticipate possible challenges in the implementation—you know your school and your team best—and share them with your consultant early in the process to partner on finding a solution before issues emerge.

6 Establish a go-live date and start early.

Most schools choose to implement software solutions in the summer before going live in the new school year. However, it is often best to begin the process in the late winter or early spring. Getting an early start will benefit your school by:

- Having school experts available when needed. Asking teachers and administrators to attend training classes and consulting sessions in the middle of the summer is challenging with individual vacation schedules.

- Giving teachers time to preview the software before leaving for the summer. Showing teachers the reality of their current school year in the new software is the best way to introduce them to the new SIS/LMS. Your team can use those current-school-year pages to teach and practice when time and schedules allow.

- Letting administrators get comfortable in the software, train their staff, and test settings and access before everyone else logs into the system.

- Providing plenty of time to populate calendars, schedules, class pages, news, resources, etc. before inviting families to log in. You want the system to be as vibrant and current as possible upon their first experience to create excitement and encourage users to return. Rushing to get everything in place at the end of the summer often creates an "under construction" view that is not a great first impression.

THE IDEAL TIMELINE FOR A SEPTEMBER 1 LAUNCH	
November/December	Establish the school's implementation team; audit and clean up data as necessary.
January	Schedule the kick-off call with the consultant as well as initial training and consultation sessions.
February 15	The deadline for delivering the constituent data import.
March 31	Complete the academic course setup with sections and rosters; allow a small beta group of teachers to access these pages and start learning the system.
April 15	Complete the current-year setup for schedule and attendance.
May 1	Finalize the current-year grading setup; conduct the initial faculty training sessions and provide logins to all teachers.

THE IDEAL TIMELINE FOR A SEPTEMBER 1 LAUNCH	
May 31	Finish the LMS/SIS consulting sessions and begin corresponding with the long-term support team.
June 1	Email parents to announce that an exciting new community will launch in September. Highlight the features that will be the most impactful for them, and let them know when they'll receive login information. Make sure the email you are using is current and ask parents for updates.
June 30	If applicable to the project, complete the historical grade import.
July	Rollover the school year and start building out the schedules and rosters for the upcoming year.
August 10	Complete the new school year setup; inform teachers that they can access class pages and start populating content and creating assignments.
August 15	Set an internal go-live date a couple of weeks before school starts to provide a buffer just in case it's needed.
August 25	Email parents and students a link to the new LMS/SIS community with login instructions for September 1.
September 1	Parents and students begin accessing the system.
September (after the start of school)	Train students on how to use the LMS/SIS.

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