

# The Canadian EdTech Playbook: Florida Edition 2025

An EdTech Resource to support Canadian EdTech Companies Doing Business in the State of Florida

TRADE COMMISSIONER SERVICE (TCS)









Team Canada EdTech Trade Mission to FETC 2024



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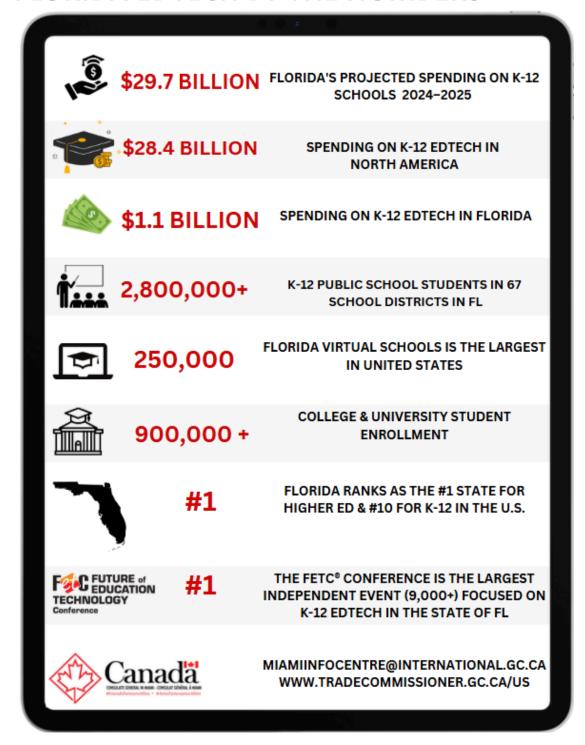
# **Forward**

The Trade Commissioner Service at the Consulate General of Miami commissioned this report to unlock one of the US's top markets for Education Technology for the Canadian companies working so diligently in the field, not just at home but around the globe. A challenging market to be sure, but Florida has 5 of the top 20 largest school districts and is ranked top 3 in places for an education, K12 or higher, making it one of the most sought-after regions by companies around the world. By utilizing this "Playbook", we hope that you will be able to see the field better, draw up a play to attack the market and increase your chances of export victory!

**Canadian Trade Commissioner Service** 



# FLORIDA EDTECH BY THE NUMBERS





# INTRODUCTION

"Florida continues to be a strategic market for Canadian EdTech companies, driven by its robust population growth, innovative spirit and strong economic ties with Canada. The key to success is building & maintaining strong relationships."

--Robert Martellacci, Founder & CEO, MindShare Learning.

The Canadian EdTech Playbook: Florida Edition 2025 was commissioned by the Canadian Consulate General of Miami as an update to the practical Playbook in supporting EdTech companies expanding their business in the state of Florida.

The Playbook provides a snapshot of the education technology landscape in Florida, a "road map" of information, and important contacts and regulations to help make entering the market as seamless as possible for the client.

Further, the Playbook provides insight on market trends, key contacts with an overarching goal to inform EdTech companies on how to best connect with prospective customers to win business in the state of Florida.

In closing, the promise of GenAI presents unparalleled opportunities for new and existing Canada EdTech companies to doing business in Florida. The key is to be mindful of the Canada – U.S. relations while establishing and maintaining strong relationships with leaders, offering mission-critical applications and hardware required to sustain learning in the K12 and Higher Education markets.

Canada's vibrant EdTech community presents exciting opportunities to serve a vast Florida market with tech-infused pedagogy to help students thrive.

We trust this Canadian EdTech Playbook will service as a critical resource and 'go-to' guide for you and your team to accelerate your speed to market.



# **Post COVID-19 ESSER Funding Status**

#### **Recent Funding Freeze and Its Implications:**

In January 2025, the Trump administration issued an executive order to temporarily freeze federal grants and loans, including those related to education, pending a comprehensive review to ensure alignment with the administration's policies. This action led to widespread uncertainty and concern among educational institutions in Florida regarding the availability of federal funds for ongoing and planned initiatives. A federal judge temporarily blocked the freeze, allowing programs to continue operating while legal challenges proceeded.

#### **Current Status and Recommendations:**

As of March 30, 2025, the legal proceedings concerning the funding freeze are ongoing, and the long-term implications for ESSER funds in Florida remain uncertain. Educational institutions and stakeholders are advised to stay informed about federal funding developments and consider contingency planning to address potential financial shortfalls.

In summary, while the Trump administration initiated the ESSER funding to support schools during the pandemic, recent actions have introduced uncertainties regarding the continuity of federal education funding in Florida.



# AI'S IMPACT ON EDUCATION

Florida public schools have been actively integrating artificial intelligence (AI) tools and curricula to enhance educational experiences for both students and teachers. Notable implementations include:







- Navigating Artificial Intelligence in Post-Secondary Education: Building Capacity for the Road Ahead
- Al policies can cover core areas such as managing admissions, enrollment, and resourcing decisions and help ensure fairness, accountability
- Infrastructure should support and encourage AI
- Artificial Intelligence and the Future of Teaching and Learning
- Florida law allows for schools to use grant money for AI tech in classrooms
- Pioneering AI Integration in Schools: The University of Florida's Approach
- Statewide AI Education Policy: Florida has been proactive in adopting AI education policies, with initiatives aimed at preparing students for an AI-enabled workforce. Resources such as online courses, webinars, and lesson plans are available to educators to support AI literacy and integration.
- Khanmigo Al Tutor in Palm Beach County Schools: Santaluces Community
  High School utilizes Khanmigo, an Al-powered tutoring tool developed by
  Khan Academy. This platform offers personalized assistance to students,
  supplementing classroom instruction and providing immediate feedback
  to support learning.
- Scholar Education Platform in South Florida: Developed by former educator Marlee Strawn, Scholar Education is an AI platform designed for classroom use. It aims to integrate AI seamlessly into students' daily learning experiences, reflecting the increasing presence of AI in their lives.
- <u>University of Florida's Al Curriculum:</u> The University of Florida (UF) has collaborated with the state to introduce an Al curriculum in public schools. This program offers courses that provide an overview of Al, programming, and machine learning, preparing students for an Al-driven society.
- AI Integration in Orange County Public Schools: Following the Florida
   Department of Education's adoption of the Artificial Intelligence
   Foundations plan, Orange County Public Schools could offer AI-related
   courses. UF has also received funding to provide professional
   development for teachers, facilitating the integration of AI into
   classrooms.

# MARKET OVERVIEW: QUICK FACTS GUIDE

Source neighborhoodscout



School District (source: niche.com)	Enrollment	
Miami Dade County Public School	<u>337,100</u>	
Broward County Public Schools	<u>251,106</u>	
Hillsborough County Public Schools	<u>233,910</u>	
Palm Beach County School District	<u>171,261</u>	
Duval County Public Schools	130,000	
Polk County Public Schools	<u>117,000</u>	
Lee County Public Schools	<u>100,169</u>	
Pinellas County Schools	<u>91,315</u>	
Pasco County School District	<u>86,431</u>	
Brevard Public Schools	<u>73,810</u>	

Notable Mention: Florida high schools have an 89.7 percent graduation rate Source: fldoe.org

Access Top10 Districts Buyer contacts in the additional resources section of this playbook



Tip! As part of your go to market strategy, be mindful that smaller, medium sized and rural school districts are typically an easier entry point to doing business in Florida vs the larger school districts.

# **PRIVATE SCHOOL MARKET**

#### **Private School Market**

As of the 2024–2025 academic year, Florida's private school sector continues to thrive, offering significant opportunities for Canadian EdTech companies.

# Florida's Private School Landscape:

• Enrollment Figures: Approximately 445,067 students are enrolled in private K–12 institutions, accounting for 13.4% of the state's total student population. KIDS COUNT Data Center



 Regulatory Environment: Private schools in Florida operate with considerable autonomy as they are not licensed, approved, accredited, or regulated by the Florida Department of Education. <u>KIDS COUNT Data Center</u>

# **Market Potential for Canadian EdTech Companies:**

- Innovative Learning Environments: Given their independence, Florida's private schools
  often seek innovative educational tools to enhance their curricula and demonstrate
  value to parents. This openness to new technologies presents fertile ground for EdTech
  solutions.
- Increased Demand for Educational Choice: Florida leads the nation with 13% of its students participating in private school choice programs, reflecting a robust demand for diverse educational options. EdChoice
- Growth in Specific Sectors: Catholic schools, a significant segment of Florida's private education system, have experienced enrollment increases, indicating a healthy and expanding market. NextSteps: Step Up For Students

# **Strategic Considerations for Market Entry:**

- Tailored Solutions: Develop EdTech products that align with the unique needs and values of Florida's private schools, emphasizing flexibility and adaptability.
- Local Partnerships: Collaborate with established organizations, such as the Florida Council of Independent Schools (FCIS), to gain insights and credibility within the community. <a href="fcis.org">fcis.org</a>
- **Demonstrated Impact:** Provide evidence of how your technology enhances student outcomes, catering to schools' desires to showcase value to parents.

By strategically engaging with Florida's dynamic private school market, Canadian EdTech companies can find ample opportunities for growth and collaboration.

#### **Charter School Market**

As of 2025, Florida's charter school sector continues to experience significant growth, presenting promising opportunities for Canadian EdTech companies.

# **Current Landscape of Florida's Charter Schools:**

Number of Schools and Enrollment: Number of Schools and Enrollment: According to
the Florida Consortium of Public Charter Schools, there are currently 739 charter schools
in Florida, serving approximately 396,522 students. This represents an increase of 29
schools and 14,155 students compared to the previous year, with charter school
students comprising about 13.8% of the state's total public-school enrollment.
<a href="https://www.fldoe.org/">https://www.fldoe.org/</a>



# Federal Policy Influences Under the Trump Administration:

- **Support for Charter Schools:** The Trump administration has demonstrated a strong commitment to expanding school choice, including charter schools. Notably, the administration has invested nearly \$1.5 billion in the development of public charter schools, contributing to the growth of this sector nationwide. The White House
- Department of Education Reforms: Efforts to dismantle or restructure the U.S.
   Department of Education have introduced uncertainties regarding federal oversight and funding mechanisms. These changes could impact charter schools' operations and their adoption of new educational technologies. Teen Vogue+3AP News+3Reuters+3

# **Opportunities for Canadian EdTech Companies:**

- Market Demand: The expanding charter school market in Florida indicates a growing demand for innovative educational solutions. Canadian EdTech firms can offer products and services tailored to the unique needs of these schools.
- Local Partnerships: Engaging with organizations like the Florida Consortium of Public Charter Schools (FCPCS) can facilitate market entry. Programs such as the FCPCS Preferred Partners Program provide access to a network of charter schools seeking quality educational tools. Florida Charter Schools
- Alignment with Policy Priorities: The current administration's emphasis on school choice and charter school expansion aligns with opportunities for EdTech companies to support digital learning initiatives, personalized education, and administrative efficiencies within these schools.

## **Strategic Considerations:**

- Regulatory Environment: Stay informed about federal and state policy changes affecting charter schools, especially those related to funding, accountability, and educational standards.
- **Competitive Landscape:** Be prepared to demonstrate the effectiveness and value of your solutions in a competitive market, highlighting adaptability to the specific needs of Florida's charter schools.
- Cultural and Market Fit: Understand the local educational culture and priorities to
  ensure your products resonate with educators, administrators, and students in Florida.
  By strategically navigating these factors, Canadian EdTech companies can effectively tap
  into Florida's growing charter school market, fostering partnerships that enhance
  educational outcomes and drive business growth. In Florida, a significant number of
  charter schools have closed, with data indicating roughly one-third closing within the
  first five years and a substantial percentage failing within the first decade. These closures



raise concerns about the financial and academic stability of charter schools, with issues like fraud, mismanagement, financial troubles, and inadequate academic performance cited as contributing factors.

Here's a more detailed breakdown:

#### **Closure Rates:**

- The Network for Public Education (NPE) has reported that roughly 18% of charter schools close within the first three years, rising to 25% within five years, and 40% within ten years. (Note Florida is above this average.)
- Some reports suggest that by the 10-year mark, nearly four in ten charter schools have closed.

# **Factors Contributing to Closures:**

- **Financial instability:** Many closures stem from financial problems like fraud, mismanagement, or inability to secure funding.
- Inadequate academic performance: Some charter schools struggle to meet academic standards, leading to a decline in enrollment and, ultimately, closure.
- Operational and logistical problems: Issues with location, faculty retention, and overall management can also contribute to poor performance and closure.

#### Addressing the Issues:

- The NPE and other educational organizations call for more rigorous oversight and accountability measures for charter schools.
- Improved financial transparency and stricter regulations are seen as crucial for ensuring the long-term sustainability of charter schools.
- Greater emphasis on student achievement and accountability measures can help identify struggling schools early on and address issues before they lead to closure.
- Researchers have also emphasized the importance of robust data collection and analysis
  to understand the reasons behind charter school closures and identify trends that can
  help inform policy decisions.

Sources: NEPC orlandoweekly K12 drive Forbes

# **GRANTS AND FUNDING FOR ED TECH**

As of April 2025, Florida offers several grants and funding opportunities aimed at enhancing educational technology (EdTech) in schools. Below is a summary of key programs:

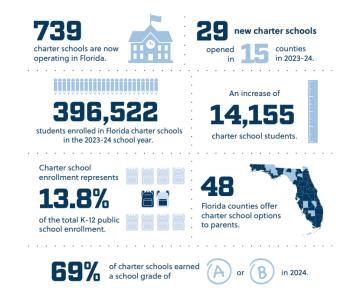
Grant Program Description	Eligible	Funding	Application	Course
	Description	Applicants	Amount	Deadline



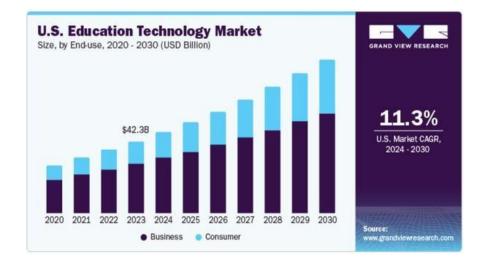
Workforce Development Capitalization Incentive Grant (Workforce CAP)	Supports the creation, and expansion of, workforce development programs, including those integrating EdTech solutions. In January 2025, over \$24 million was awarded to various institutions.	School districts and Florida College System institutions	Varies per project	Annually, specific dates announced by FDOE	FDOE Workforc e CAP
Perkins V Funding	Provides approximately \$73 million annually to enhance career and technical education (CTE) programs, which may include EdTech components.	School districts and Florida College System institutions	Varies per project	Annually, specific dates announced by FDOE	FDOE Perkins V
Pathways to Career Opportunities Grant (PCOG) Program	Funds the establishment or expansion of registered apprenticeship or pre-apprenticeship programs, potentially incorporating EdTech tools.	Various educational institutions and organizations	Varies per project	Annually, specific dates announced by FDOE	FDOE Pathways Grant
FPL STEM Classroom Grants	Provides funding to advance STEM curricula and careers, focusing on technology resources for diverse students in K-12 Title I schools or schools with at least 40% economically disadvantaged students.	K-12 Title I public, charter, or private schools	Varies per project	Annually, specific dates announced by FPL	FPL STEM Grants
GoTeach! Classroom Grants	Offers direct-to-classroom funding for innovative projects, including those involving EdTech, with awards ranging from \$1,000 for individual teacher projects to \$5,000 for STEM-related initiatives.	Teachers in Palm Beach County schools	\$1,000 to \$5,000	Annually, specific dates announced by Education Foundation of Palm Beach County	GoTeach! Grants
Student Technology Fee Grants	Funds projects proposed by students, staff, and faculty to enhance instructional technology services and infrastructure at the University of Florida.	University of Florida community members	Varies per project	Annually, specific dates announced by UF	UF Student Tech Fee Grants
21st Century Community Learning Centers (21st CCLC)	Supports the creation of community learning centers that provide academic enrichment opportunities, which may include EdTech initiatives, during non-school hours.	Local educational agencies, community-base d organizations	Varies per project	Annually, specific dates announced by FDOE	FDOE 21st CCLC



Canadian EdTech companies should really make a point of winning their own backyard first with a few success stories before dipping their toes into the big pond of the US education market.

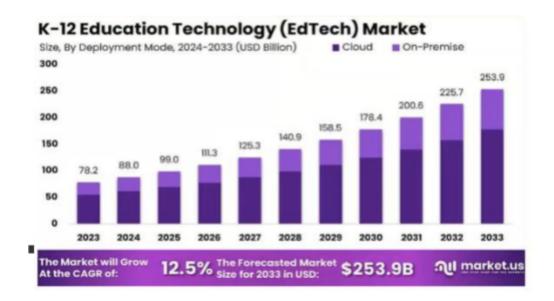


Source: FCPCS 2025, FACT SHEET









Source: Grand View Research

# **U.S. Education Technology Market Trends**

The education technology market in the U.S. is expected to grow at a CAGR of 11.3% from 2024 to 2030, owing to the presence of numerous start-ups and well-established EdTech companies in the country. Further, the growing number of schools and educators



adopting technology and a surge in investments are enhancing learning outcomes within the education sector.

As of January 2025, the Florida department of education offers several grant opportunities for K-12 education in Florida, both at the state and national levels;

**Family Empowerment Scholarship (FES):** This program offers families of students with disabilities, as young as 3 years old, access to additional education options. Families may choose to enroll their student in another public school or receive a personal education savings account (ESA) for customized learning services.

**Florida Tax Credit Scholarships:** Provides scholarships to low-income students to attend private schools or out-of-district public schools. The program is funded through private corporate donations, with donors receiving a 100% tax credit for their contributions.

Florida Department of Education Hope Scholarship Program: Offers scholarships to students who have been victims of bullying, harassment, assault, or other violent acts, allowing them to attend another public or private school.

Florida Department of Education New Worlds Reading Scholarship Accounts: Provides \$500 to parents for tutoring, textbooks, summer school programs, and other resources aimed at improving reading and literacy skills for eligible students.

# Funding Opportunities & Procurement Pathways for EdTech Companies in Florida

- Unified School Improvement Grant (UniSIG)
   Supports Florida's lowest-performing schools with funding to implement student outcome improvement strategies.
- Supplemental Teacher and Administrator Allocation (STAA)
   Provides targeted funding to enhance teacher and administrator support in underperforming schools.
- Education Research Grants Program (IES)
   Offered by the U.S. Institute of Education Sciences, this program funds research to improve education. FY2025 deadline: Sept 12, 2024. FIES Grants Overview
- Institute of Education Sciences & Federal Grants
   Multiple K-12 grants are available via the U.S. Department of Education for teacher development, disability services, and vocational education. Florida applicants typically apply through the FLDOE or SFOs like <a href="Step Up For Students">Step Up For Students</a>.
   Grants.gov | IES Programs

## **Procurement Pathways in Florida**

1. Request for Proposals (RFPs)

Florida school districts post RFPs via e-procurement platforms.

- St. Johns County and Indian River County use <a href="DemandStar">DemandStar</a>.
- Vendors can register to receive bid notifications and access proposal packages.



#### 2. Cooperative Purchasing Programs

- **BuyBoard** Endorsed by the FSBA, offers pre-bid vendor access for cost-saving procurement.
  - BuyBoard Info
- Florida Sheriffs Association (FSA) Since 1993, has provided statewide contracts for educational institutions.
  - **FSA Cooperative Purchasing**

#### 3. State Contracts & Agreements (Consortiums)

Florida's **Department of Management Services (DMS)** facilitates purchasing through competitively sourced state contracts for schools and agencies. Benefits:

- Cost Savings via group purchasing
- Administrative Efficiency (pre-bid contracts)
- Regulatory Compliance
  - **DMS State Contracts**

# **HIGHER EDUCATION QUICK OVERVIEW:**

- Florida is home to a total of 228 universities and colleges.
- The State University System of Florida is comprised of 12 universities and more than 430,000 students, making it the second-largest public university system in the nation.
- The FCS has 640,183 students enrolled in 28 colleges and 70 campuses.
- 30-member non-profit institutions of the Independent Colleges and Universities of Florida 45 for profit colleges and universities

Sources: Florida Department of Education and <u>Independent Colleges and Universities of</u>
<u>Florida: ICUF</u> and <u>CollegeSimply</u>



# **MARKET TRENDS AND OPPORTUNITIES**

As of January 2025, the U.S. education technology (EdTech) market is experiencing significant growth and transformation. Key trends and opportunities include:

#### 1. Hybrid and Blended Learning Models

The integration of in-person and online education continues to expand, offering flexibility and personalized learning experiences. This approach is particularly beneficial for diverse student populations and supports various learning styles.

#### 2. Artificial Intelligence (AI) and Machine Learning (ML) Integration

Al and ML are enhancing adaptive learning platforms, intelligent tutoring systems, and personalized content delivery. These technologies optimize student engagement and improve learning outcomes by tailoring educational experiences to individual learner profiles.

3. Immersive Learning Through Augmented Reality (AR) and Virtual Reality (VR)
AR and VR are revolutionizing education by creating immersive experiences that
enhance comprehension, retention, and engagement, particularly in STEM fields and
vocational training.

#### 4. Microlearning and Bite-Sized Content

The demand for short, focused learning modules addresses the need for digestible and on- the-go educational content, catering to working professionals and lifelong learners seeking skill development.

#### 5. Cloud-Based Solutions and Scalability

Cloud deployment continues to dominate, enabling scalability, accessibility, and seamless integration of remote and hybrid-learning models. This trend supports the growing need for flexible and accessible learning solutions.

#### 6. Personalized and Adaptive Learning

There is a growing emphasis on personalized learning experiences that adapt to individual student needs, promoting self-driven education and enhancing engagement.

#### 7. Social-Emotional Learning (SEL) Integration

Incorporating SEL into educational platforms is gaining traction, supporting students' emotional well-being and fostering a holistic approach to education.

#### 8. Expansion of Cloud Computing in Schools

The adoption of cloud computing solutions is increasing, providing schools with scalable and cost-effective infrastructure to support digital learning environments.

#### 9. Partnerships with EdTech Startups

Educational institutions are increasingly collaborating with EdTech startups to innovate and integrate new technologies into their curricula, enhancing educational offerings.

#### 10. Rise of Mixed Reality (MR) in Education

The integration of MR technologies is creating interactive and engaging learning experiences, particularly in fields requiring practical application and simulation.

• For the first time, the number of students who have enrolled at a public charter school in Florida crossed the 400,000 mark in the 2024-25 school year.



• In 2024, Governor DeSantis approved a record \$28.4 billion for K-12 public school funding, including a historic per-student allocation of \$8,959, reflecting an increase of \$240 over the previous year.

**SOURCE: COSN** 

 The K-12 education technology market in North America is expected to grow to \$8.8 billion by 2032



As of March 2025, the **EdTech funding landscape** is experiencing significant fluctuations influenced by several key factors:

- **1. Post-Pandemic Market Adjustments:** The surge in EdTech investments during the COVID-19 pandemic has subsided. In 2024, global EdTech funding increased to \$6.3 billion from \$5.6 billion in 2023, with deal counts rising from 915 to 1,153. This growth was largely driven by U.S. activity, indicating a stabilization in the funding environment. Brighteye Ventures
- **2.** Integration of Artificial Intelligence (AI): The rapid advancement of AI technologies has disrupted the EdTech sector. While some companies, like Duolingo, have successfully integrated AI to enhance their offerings, others face challenges adapting to this new landscape. Investors are cautiously evaluating how AI impacts the value propositions of EdTech solutions. Financial Times Financial Times
- **3. Investor Sentiment and Valuation Adjustments:** Investor enthusiasm has tempered, leading to more conservative valuations. By Q4 2024, the median revenue multiple for EdTech companies was 1.6x, reflecting a stabilization after previous fluctuations. <a href="Finerva">Finerva</a>
- **4. Emergence of New Market Players:** Despite the challenging environment, new startups continue to enter the EdTech space, particularly those focusing on Al-driven solutions and personalized learning experiences. This influx contributes to the dynamic nature of the funding landscape.



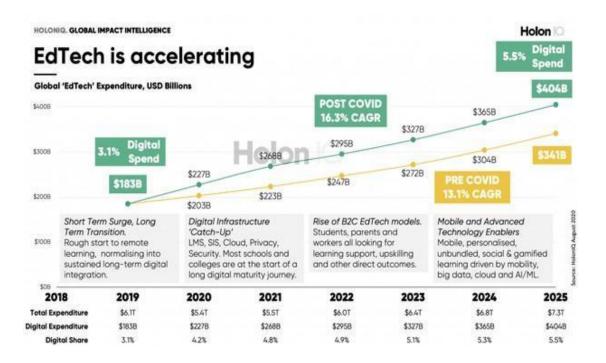
**5. Evolving Educational Needs:** Shifts towards hybrid learning models and the increasing demand for lifelong learning solutions are influencing funding priorities. Investors are keen on platforms that offer flexible, scalable, and technology-integrated educational experiences. <u>Global Services In Education</u>

In summary, the EdTech funding environment in 2025 is characterized by a recalibration following the pandemic-induced boom, the disruptive integration of AI, and a cautious yet opportunistic investor outlook. Companies that demonstrate adaptability, innovation, and a clear value proposition aligned with current educational trends are better positioned to navigate this evolving landscape.

**6. Growing preference for doing business locally:** Especially due to popular sentiment in both Canada and the U.S. because of the Trump administrations' proposed tariffs on trading partners, including Canada, there is a growing preference for Canadian businesses to have a local presence to Florida (see more on page 33)



# HIGHER EDUCATION MARKET IN FLORIDA



GLOBAL OPM AND ACADEMIC PPP MARKET

Holon O

# \$2.2T Global Higher Education Market

Higher Education is an enormous global market at \$2.2T growing to \$2.5T by 2025. Online Degree focused Higher Education makes up less than 2% of that total. Although expected to double by 2025 to \$74B, it will still only make up 3% of Higher Education spend.

#### Total Global, Online Higher Education and OPM Market 2025, USD





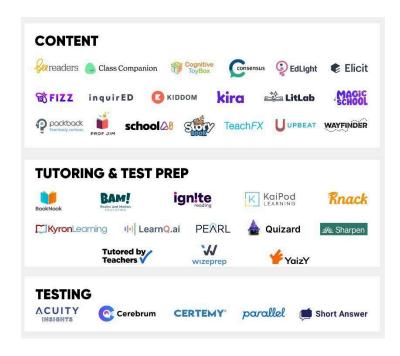
# **KEY COMPETITORS**

To appreciate the size and scope of the Higher Education Market in Florida, we need to begin with a macro view of the US Ed Tech market size. According to HolonIQ 2025, The education market is projected to reach almost US\$ 10 trillion by 2030, growing at a compound annual growth rate (CAGR) of 4.4%, driven by several key factors



Colleges and Universities in Florida can prove to be excellent strategic partners through their research centres of excellence and incubators. The University of South Florida Center for Instructional Technology is a case in point, where the provide a variety of services, including technology integration evaluation. A stamp of approval from a local university will demonstrate your commitment to the Florida market.

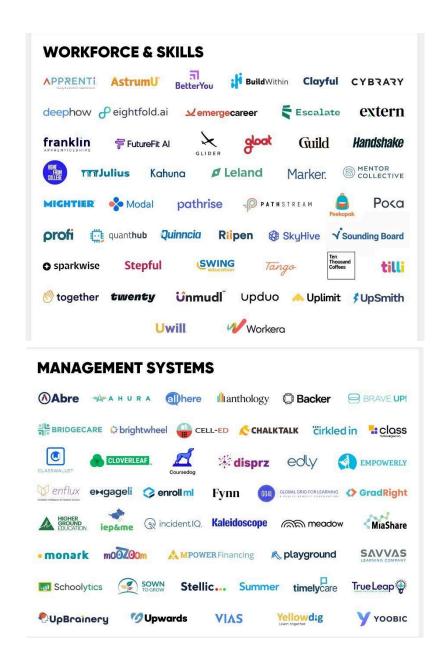












Florida is a highly desirable EdTech market due to its population's growth and appeal as a sunny destination to live, work, learn and play. Being ranked number one in education in the US further solidifies its position as one of the best EdTech markets in America. Holon IQ has developed a list of the top 200 North American emerging companies in the education technology market in 2024. It is essential to research your competition who are deemed to be leaders in their respective product/service categories. You will not doubt encounter many of these players as you enter the Florida market.



# LARGE MARKET COMPETITORS

A key factor to thriving and surviving within the education technology sector is familiarizing yourself with the competition and potential strategic partners. The following are a short list of EdTech companies on the ground in Florida who are dominating the market, especially during the pandemic and beyond.

# **Top U.S.-Based EdTech Competitors in Florida**

#### 1. PowerSchool

- What they do: SIS (Student Information System), LMS, analytics, assessment, and talent management tools.
- Florida footprint: Widely adopted across school districts for SIS and assessment platforms.
- Competitive edge: Deep integration with district back-end systems.

#### 2. Instructure (Canvas LMS)

- What they do: LMS platform (Canvas), used in both K–12 and higher ed.
- Florida footprint: Used by many Florida colleges, universities, and K–12 districts.
- **Competitive edge**: Intuitive user-interface, strong integrations, and large user base.

#### 3. Nearpod (based in Florida)

- What they do: Interactive lessons, real-time assessments, and student engagement tools.
- Florida footprint: Homegrown and deeply embedded in Florida districts.
- Competitive edge: Local relationships, alignment with standards, and SEL capabilities.

#### 4. Houghton Mifflin Harcourt (HMH)

- What they do: Digital curriculum and assessment solutions.
- Florida footprint: Long-standing vendor with deep roots in public school systems.
- Competitive edge: Content-driven platform integrated with state standards.

#### 5. ClassLink

- What they do: Single sign-on (SSO), rostering, and identity management for schools.
- Florida footprint: Many districts use ClassLink to streamline EdTech access.
- Competitive edge: Strong partnerships and technical backbone in Florida K-12.

### **Platform-Based or Niche Competitors**

- Amplify K–8 digital curriculum with strong ELA/science content.
- Clever SSO and student rostering tool (often paired with ClassLink).
- Savvas Learning Interactive curriculum and assessment.
- **Edmentum** Virtual learning, credit recovery, and interventions.
- Imagine Learning Literacy, math, and multilingual learner tools.



## **Emerging AI and SEL Competitors**

- **Sown to Grow** Student goal setting and SEL tracking platform.
- **Kiddom** Digital curriculum platform with instructional tools and analytics.
- **Zearn** Digital math learning platform aligned with state standards.
- **Schoolytics** Data dashboards and classroom analytics for educators.

# **Competitive Challenges for Canadian EdTechs in Florida**

- 1. **Established Local Vendors**: Many districts prefer vendors with existing state contracts or local representatives.
- 2. **Procurement & Compliance**: Navigating Florida DOE regulations and local procurement processes can be a hurdle.
- 3. **Brand Recognition**: U.S. competitors often have greater visibility and existing success stories with local districts.



# **GO TO MARKET STRATEGY**

#### 1. Establish a Local Presence at minimum with an address, coworking space, or office

Why it matters: Credibility, procurement preference, and relationship-building. How to do it:

- Incorporate a U.S. entity (LLC or C-Corp)
- Secure a Florida-based office address or virtual office (e.g., Miami, Orlando, Tampa)
- Hire or contract a local education consultant or EdTech rep familiar with Florida DOE & district processes

"Being on the ground builds trust and demonstrates long-term commitment to the district's success." – Robert Martellacci

#### 2. Align with Florida's Strategic Priorities

Understand the Florida Department of Education (FLDOE) goals:

- Reading and math proficiency
- Workforce readiness and career pathways
- Mental health and SEL supports
- · Personalized and digital learning
- School safety and data privacy

Tailor your solution messaging to address:

- Florida's Benchmarks for Excellent Student Thinking (B.E.S.T.) standards
- ESSER-aligned goals (All funding has been put on hold by the Trump administration)
- Teacher professional development and recruitment support

#### 3. Partner with Local Resellers & Distributors

Forge alliances with trusted channel partners:

- JourneyEd, ClassLink, CDW-G, TechMIS, or TD SYNNEX (SMART partner)
- Florida-based EdTech consultants: Kathy Hurley, Rita Ferrandino, Chuck Amos
- Consider co-selling or integrating into their platforms for:
- Faster procurement
- Easier onboarding
- · Shared credibility

#### 4. Launch Targeted Pilots in Priority Districts

Focus on pilot-ready districts that are:

- Open to innovation
- Large enough to scale
- Have remaining ESSER or tech innovation funds (e.g., Miami-Dade, Orange County, Hillsborough, Osceola)

#### Offer:

- Data-backed pilot outcomes
- Custom PD (professional development)
- Post-pilot impact reporting to support long-term contracts

#### 5. Build Brand Trust Through Visibility & Validation



Attend or sponsor key Florida conferences:

- FETC (Future of Education Technology Conference)
- Florida CASE (Special Ed leaders)
- FDLA (Florida Distance Learning Association)
- UCF's AI in Teaching and Learning
- Secure testimonials and case studies with early adopters
- Apply for local or national EdTech awards and certifications (e.g., ISTE Seal, LearnPlatform Efficacy Reports)

#### 6. Pricing Strategy: Flexible & Multi-Year

#### Offer:

- Volume-based discounts
- Bundled pricing (PD + tech)
- Multi-year licensing to use ESSER funds more effectively before expiry

#### 7. Marketing & Lead Generation

Localized content:

- Florida-specific landing pages
- Webinars with FL-based educators or partners
- Case studies from other U.S. or Canadian districts
   Channels:
- Email drip campaigns targeting district leaders
- Paid LinkedIn and Google Ads targeted by geography
- Earned media in Florida education news (e.g., Florida Trend, EdSurge, District Administration)

# **DOING BUSINESS IN FLORIDA**

Several key factors should be considered when choosing to do business in Florida:

- 1. **Business Climate and Economic Environment:** Florida is renowned for its favorable business climate, characterized by pro-business state tax policies, competitive operational costs, and a streamlined regulatory environment, thereby facilitating business growth and attracting companies across various industries.
- 2. Taxation and Regulatory Changes: Florida does not impose a state income tax on individuals, which can be advantageous for business owners. However, businesses may be subject to other taxes, including sales-and-use tax, reemployment (unemployment) tax, corporate income tax, and franchise tax. In 2025, Florida introduced several new laws affecting business operations, including restrictions on social media use for minors and updates to building codes. Businesses must adjust their operations accordingly.
- **3. Workforce and Demographics:** Florida boasts a large, diverse, and skilled labor force, with over 10 million people, which is beneficial for businesses seeking qualified employees across various sectors. Florida's population is projected to grow by over 2.8 million residents by 2030, indicating a steadily increasing market size and potential customer base for businesses.



- 4. **Infrastructure and Location:** Florida's geographical position makes it a hub for international trade and commerce, offering businesses strategic advantages in logistics and distribution. The state is well-connected through its ports, airports, and highways, facilitating efficient transportation and access to domestic and international markets.
- **5. Legal and Compliance Considerations:** Businesses in Florida must adhere to various legal requirements, including federal reporting obligations, wage regulations, and local tax responsibilities. Staying informed about these requirements is essential for legal compliance and smooth operations.
- 6. **Market Opportunities and Challenges:** Certain Florida cities, such as Miami and the Tampa-St. Petersburg area, are identified as promising housing markets for investors in 2025, driven by rapid population growth and affordability. This presents opportunities for businesses in real estate and related sectors.
- Natural Disasters: Florida is susceptible to hurricanes and other natural disasters, which can impact business operations. It is crucial for businesses to draw contingency plans and consider insurance options to mitigate potential risks.

#### **KEY CHANNEL PARTNERS**

JourneyEd: Specializing in educational technology solutions, JourneyEd offers a wide range of products tailored for schools, including software, hardware, and related services. Their extensive experience in the education sector and responsive support make them a valuable partner for educational institutions. On its' website, the company states that it has, "developed a reputation for long-standing commitment to the education sector, deep industry expertise, and reliable products and services".

Miami EdTech: Based in Miami, this organization focuses on providing educators, community members, and students with tools to succeed in the tech industry. They offer professional learning programs, curriculum development, and entrepreneurship training, positioning them as a key player in Florida's EdTech landscape. Miami EdTech and its partners work to address systemic challenges in education, provide a means for today's educators to turn their tech-enabled solutions into successful enterprises, and advance diversity, equity, and inclusion in computer science education.

#### STRATEGIC FLORIDA EDUCATION CONFERENCES

#### FETC: Future of Education Technology Conference

January; Orlando, Florida

Online event hosted for education technology teams. FETC is a completely free event that will be hosted virtually. This conference will be using state-of-the-art technology to facilitate the event. Connect with leaders and professionals in the education technology sector, learn from top innovators, experts and educators, experience the opportunity to connect with AI based networking, and explore the FETC virtual expo.

#### **Green Schools Conference**

March; Orlando, Florida



The Green Schools Conference celebrates 15 years of advancing whole-school sustainability. This two-day event will offer interdisciplinary sessions focused on promoting green initiatives, sustainability, and environmental health in schools.

#### **Innovative Schools Summit**

#### March; Orlando, Florida

Network with fellow educators and learn from nationally recognized speakers who share their experiences and proven strategies to help you succeed in the classroom and in your career. The Orlando Summit features access to four education conferences for the price of one.

#### **SITE 2025**

#### March 2025; Orlando

SITE 2025 was the 36th annual conference of the Society for Information Technology and Teacher Education. This society represents individual, and affiliated organizations of, teacher educators in all disciplines who are interested in the creation and dissemination of knowledge about the use of information technology in teacher education and faculty/staff development.

#### **Florida Online Innovation Summit**

Date: April 10, 2025

Division of Digital Learning

Location: University of Central Florida, Orlando, FL.

#### Teaching & Learning with AI: A Sharing Conference

Dates: May 28-30, 2025

Location: University of Central Florida, Orlando, FL

# INCUBATORS AS PART OF YOUR GO TO MARKET STRATEGY

**Miami EdTech (Miami):** Focuses on providing educators, community members, and students with the tools needed to launch careers in the tech industry. They offer programs that support the development of EdTech solutions, making it a valuable resource for entering the Florida EdTech market.

#### My School Tech Hub UCF Business Incubation Program (University of Central Florida):

My School Tech Hub provides instruction, curricula, and advanced hardware and software to advance technology education for K-12 students. This incubator acts as an entry point for EdTech initiatives aiming to impact the K-12 education system.



#### Tampa Bay Technology Incubator (TBTI) (Tampa Bay, University of South Florida):

Hosted by USF CONNECT, TBTI supports technology research as a catalyst for economic development. While not exclusively focused on edtech, its resources and network can benefit edtech startups looking to establish a presence in Florida.

**Starter Studio (Orlando):** offers various accelerator programs depending on the growth stage of a company. As the only 501(c)(3) nonprofit accelerator supporting Central Florida tech startup founders, it provides a supportive environment for edtech startups.

**Tampa Bay WaVE (Tampa Bay):** Founded in 2008, Tampa Bay WaVE is an organization "for entrepreneurs, by entrepreneurs," focusing on helping launch tech startups. Their accelerator programs, such as TechDiversity and TechWomen Rising, can be valuable for edtech startups seeking mentorship and resources.

**UF Innovate (University of Florida):** Innovate connects innovators with entrepreneurs, investors, and industry, incubates startups and growth companies, and fosters a resilient economy. While not exclusively ed tech-focused, it offers resources that can be beneficial for edtech startups entering the Florida market.

#### **FOCUSED MARKET STRATEGY**

#### **Align with State Educational Initiatives**

Workforce Development Focus: Florida is investing significantly in workforce development programs to enhance career and technical education. In January 2025, the Florida Department of Education awarded over \$24 million to expand such programs. Ed Tech solutions that support vocational training and skill development will find a receptive market. Strategic Plan for Online Education: The State University System's 2025 Strategic Plan emphasizes improving instruction and increasing educational opportunities through online education. EdTech companies offering robust online learning platforms can play a pivotal role in this initiative.

#### **Leverage Emerging EdTech Trends**

Career and Technical Education (CTE): There's an anticipated expansion of CTE and apprenticeship programs, as well as work-based alternatives to traditional college pathways. EdTech solutions that facilitate CTE can capitalize on this trend. Systemwide Academic Interventions: Educators are focusing on implementing comprehensive academic interventions to address learning gaps. Tools that assist in personalized learning and targeted interventions will be in demand.

#### Participate in Key EdTech Conferences



**Future of Education Technology Conference (FETC) 2025:** took place from January 14-17, 2025, in Orlando, FETC is a premier event that brings together educators, technology leaders, and industry experts to explore the latest advancements in EdTech. Participating in FETC can provide valuable networking opportunities and insights into the Florida EdTech landscape.

#### Society for Information Technology and Teacher Education (SITE) 2025 Conference:

Taking place from March 17-21, 2025, in Orlando, SITE 2025 is dedicated to the integration of information technology in teacher education. Attending SITE can help in understanding the needs of educators and aligning products accordingly.

#### **Engage with Local Educational Institutions**

Collaborate with School Districts and Colleges: Building partnerships with local educational institutions can facilitate pilot programs and case studies, demonstrating the effectiveness of your EdTech solutions

Understand Curriculum Frameworks: Familiarize yourself with Florida's curriculum frameworks, especially in Information Technology and Engineering & Technology Education, to ensure your products meet state educational standards.

#### **Monitor Funding and Investment Opportunities**

State Budget Allocations: Stay informed about Florida's budget priorities, such as the \$451 million allocated for workforce training and emerging technologies in the 2024-2025 budget.



# SEEKING EXPERT CONSULTING ADVICE ON THE GROUND IN FLORIDA

In combination with this Playbook, your go to market strategy might include a local EdTech Consultant, depending on your budget. Savvy EdTech consultants can accelerate your speed to market by lessening the learning curve with their local knowledge and open doors. They typically can help you gain entry to school districts, establish pilots and create lead gen opportunities.

These consultants bring deep knowledge of the Florida education landscape and can support you with, Facilitating introductions to district leaders and key decision-makers, Securing pilot programs and partnerships, Navigating procurement processes and compliance requirements, Advising on go-to-market strategy, business models, and pricing, Providing insight into whether your solution addresses a critical local need, Generating qualified leads and helping build your sales pipeline, Engaging a trusted local advisor not only enhances credibility but signals your commitment to long-term success in the Florida market.

Below is a list of four highly regarded Florida-based EdTech consultants with extensive experience supporting Canadian and international companies. As always "Caveat Emptor", but this list is those with experience and qualifications for the audience for this report:

**Kathleen Hurley** – Strategic Advisor, former executive, well-connected across U.S. EdTech circles

kathleenmaryhurley@gmail.com

**Rita Ferrandino** – Managing Director at ARC Capital Development, expert in U.S. district sales strategy

rita@arccd.com

**Josh Chernikoff** – Founder, EdTech Consultant with over 20 years of expertise in lead gen, sales and brand building

**E** jc@joshchernikoff.com

**Chuck Amos** – K12 strategy and EdTech partnerships expert, former Apple education leader

E chuckamos@me.com



#### OVERCOMING THE 'MADE IN THE US CHALLENGE'

Being mindful of the Canada – U.S. trade relations is essential in overcoming barriers to doing business in the state of Florida. A localized, country-specific marketing strategy and website is essential to winning the hearts and minds of teachers and in demonstrating a commitment to the region.

To overcome this barrier to entry, it is vital to establish a strong presence on the ground in Florida, beginning with a local address. Developing a strong presence on the ground in Florida proves to school districts, buyers, resellers, etc. that your company is focused on achieving the common goal of providing the Florida school division with the highest of quality technology, best platforms and educational resources to maintain and obtain the best educational system for youth.

#### Why a Local Presence in Florida Matters for Canadian EdTech Companies

Establishing a physical presence in Florida — whether through a local office, regional representative, or U.S. incorporation — significantly enhances credibility, fosters trust with school districts, and demonstrates long-term commitment. Being on the ground enables Canadian EdTech companies to:

- Build stronger relationships with Florida's K12 and higher ed institutions through face-to-face meetings and faster support.
- Navigate procurement systems more effectively, many of which favor domestic vendors or those with a U.S. address.
- Be eligible for local funding opportunities and pilot programs that require vendors to operate within the state.
- Attend regional events, conferences, and school board meetings, staying top-of-mind with decision-makers.
- Gain insight into state-specific curriculum standards and compliance needs (e.g., Florida DOE digital learning initiatives, student privacy laws).
- This "boots-on-the-ground" strategy has proven essential for the success of Canadian EdTech leaders like D2L, SMART Technologies, and ThoughtExchange, all of whom have cultivated lasting partnerships in Florida through regional engagement.



# **CANADIAN SUCCESS STORIES**

# **ApplyBoard**

**ApplyBoard** (Kitchener, Ontario) has played a pivotal role in streamlining the international student application process for universities across the U.S. By 2024, the company had facilitated the admissions of over 300,000 students, addressing key challenges in global educational mobility. Its success highlights the growing demand for efficient, tech-driven solutions in higher education, reinforcing Canada's influence in the U.S. EdTech landscape.

ApplyBoard has been instrumental in increasing international student interest in the U.S. A <u>survey conducted in November 2024</u> found that interest in studying in the U.S. was rising, with study goals aligning with in-demand fields.

#### THINKIFIC

Thinkific (Vancouver) Thinkific has enabled educators and entrepreneurs to create and sell online courses, gaining significant traction in the U.S. market. By 2024, over 50,000 course creators leveraged the platform, demonstrating the scalability of Canadian EdTech solutions in a competitive online learning environment. The company's success underscores the increasing adoption of digital learning tools and the demand for flexible, self-paced education across industries.

Thinkific has empowered numerous educators and entrepreneurs to create and sell online courses. For instance, IT consultant Johan Arwidmark scaled his training business to over \$1M in revenue using Thinkific by offering live courses and engaging with his IT community.

# D<sub>2</sub>L

**D2L (Desire2Learn)** (Kitchener, Ontario) D2L's Brightspace learning management system has been widely adopted by American universities and institutions, solidifying its reputation as a leader in digital learning. In 2024, the company expanded its U.S.



- partnerships, working with higher education institutions to enhance online learning experiences through personalized and data-driven teaching methods.
- Accessibility Innovation: In 2025, D2L collaborated with Crawford Technologies to integrate AccessibilityNow® DocMD into Brightspace, addressing a critical need for accessible course content. This partnership marked a significant step toward ensuring digital inclusivity in higher education.
- D2L's Brightspace learning management system has been adopted by several American universities. Purdue University, for example, utilized Brightspace to build an accessible and centralized learning hub, reducing course administration workload for faculty and enhancing student access to resources.

# † Thought Exchange

ThoughtExchange, has made a meaningful impact in the Florida education sector. In a strategic initiative, the Osceola School District, which serves nearly 70,000 students, utilized the platform to collect community feedback for a new strategic plan. This successful implementation demonstrated how Canadian EdTech firms can drive innovation in stakeholder engagement and decision-making within U.S. school districts. ThoughtExchange has facilitated community engagement in U.S. school districts. The Osceola School District in Florida used the platform to gather 360-degree feedback from its community, aiding in the development of a new strategic plan.



# **CONCLUSION**

# Conclusion: Florida—A Strategic Gateway for Canadian EdTechs in a New Era of Innovation and Trade

Targeting the State of Florida as part of your EdTech growth strategy remains a highly appealing and viable opportunity. With its concentrated and diverse education market, spirit of innovation (often attributed to the "Disney Effect"), and openness to technology-driven learning, Florida continues to position itself as a leader in digital transformation across K–12 and higher education.

For Canadian EdTech companies, entering the U.S. market—especially in today's climate—requires more than a compelling product. It requires a thoughtful, strategic approach grounded in cultural understanding, trade diplomacy, and technological innovation.

At a time when Canada–U.S. trade relations are navigating a sensitive period, particularly around digital sovereignty, data privacy, and procurement policies, it's vital for Canadian companies to demonstrate commitment to local impact, compliance, and partnership—not simply cross-border commerce. Leveraging the guidance and advocacy of the Canadian Trade Commissioner Service in Miami can play a pivotal role in ensuring alignment with both policy and market expectations.

The emergence of Generative AI (GenAI) further raises the bar. Florida school districts and post-secondary institutions are increasingly exploring AI-enhanced learning, personalized instruction, and workforce alignment. Canadian EdTechs that embrace GenAI responsibly and ethically—and clearly articulate their impact on learning outcomes—will find a receptive audience and a unique competitive advantage.

As seen in this Playbook and real-world success stories, the pathway to growth in Florida is attainable—but it requires persistence, partnership, and a long-term mindset. A 2–3 year investment horizon is a realistic timeframe to build brand awareness, pilot success, and generate sustainable revenue streams.

Attending cornerstone events like the Future of Education Technology Conference (FETC) can serve as a springboard for networking, relationship-building, and market validation. Florida's status as the #1 U.S. destination for Canadian travelers and businesses adds a lifestyle advantage, making the market not just promising—but also personally rewarding.

In this era of global EdTech evolution, Florida offers Canadian companies more than just a market—it offers a proving ground for innovation, a platform for cross-border collaboration, and an opportunity to help shape the future of learning in the AI age.



# **ADDITIONAL RESOURCES**

This section provides key contacts and resources for Canadian businesses seeking to expand into Florida's education sector. It includes trade support contacts, procurement leads for major school districts, educational technology resources, and grant funding opportunities.

#### TRADE SUPPORT CONTACT

Consulate General of Canada in Miami, FL

Address: 200 South Biscayne Boulevard, Suite 1600, Miami, Florida, U.S.A., 33131

**Consul General:** Sylvia Castrato

Senior Trade Commissioner: Mark Strasser

Phone: +1 305-579-1600

Email: <a href="mailto:ccs.scc@international.gc.ca">ccs.scc@international.gc.ca</a>

#### **KEY EDUCATION BUYERS IN FLORIDA**

School District	Procurement Agent	Instructional Technology Director
Miami Dade County Public School	Namita Uppal Director of the Strategic Procurement Department (305) 375-5773	Marco Diez Executive Director School Choice Instructional Technology marcodiez@dadeschools.net
Broward County Public Schools	Jennifer Andreu Executive Director, Operations 7543210774	<u>Dr. Jeanine Gendron</u> Instructional Technology Director (754) 321-0475
Hillsborough County Public Schools	Corey A. Murphy General Manager of Procurement Services (813) 272-4374	<u>Dr. Thomas Weeks</u> Chief Technology Officer <u>Thomas.Weeks@hcps.net</u> (813) 272-4230
Palm Beach County Schools	Debra Hammerschlag Senior Purchasing Agent L 561-434-8422	Dr. David Atwell Director of Educational Technology (561) 357-5948

Duval County Public Schools	Terrence Wright Director (904) 858-4859	Jim Culbert Executive Director of Information Technology (904) 390-2115
Polk County Public Schools	Robert Woods Purchasing Agent (863) 534-0576	Nathan Medley Executive Director of Technology 770-748-3821
Lee County Public Schools	Mary Tucker Director 239-533-8875	Mr. Andrew Click Technology Director 334.705.4210
Pinellas County Schools	Joe Benjamin Director of Purchasing (727) 588-6143	Keith Mastorides Chief Technology Officer mastoridesk@pcsb.org 727 588-6243 Other Instructional Technology Coordinators: Steve Alex, Laura Clark, Stacey Pellerin-Vanderloop, Karen Todd, and James Wilson
Pasco County School District	Michael Woodall purchasing agent (813) 794-2222	ChristopherJackson Director of Technology and Information Services cjackson@pasco.k12.fl.us
Brevard Public Schools	Sean Hynes  Director of Procurement  Distribution Services  321-501-1507link	Dawn Bronstein Director of Instructional Technology (321) 633-1000 ext. 11772 Russell Cheatham Chief Information Officer (321) 633-1000 ext. 11700



#### **EDUCATIONAL TECHNOLOGY RESOURCES**

#### Technology Integration Matrix (TIM) - University of South Florida

The TIM provides a framework to enhance learning through technology, identifying five key learning characteristics—active, collaborative, constructive, authentic, and goal-directed—across five levels of integration: entry, adoption, adaptation, infusion, and transformation.

(Source: Florida Center for Instructional Technology)

#### FLORIDA STATE EDUCATION RESOURCES

#### Florida Department of Education

Turlington Building, Suite 1514, 325 West Gaines Street, Tallahassee, FL 32399

Email: Commissioner@fldoe.org

Phone: (850) 245-0505

#### <u>Website</u>

#### Office of Student Financial Assistance (Higher Education)

Millican Hall, Room 107, Orlando, FL 32816-0113

Email: finaid@ucf.edu
Phone: (844) 376-9160

#### Bureau of Exceptional Education & Student Services (Special Education)

325 West Gaines Street, Tallahassee, FL 32399-0400

Email: BESEsupport@fldoe.org

Phone: (850) 245-0475

#### **Adult Education Programs**

325 West Gaines Street, Suite 754, Tallahassee, FL 32399-0400

Email: Tara.Goodman@fldoe.org

Phone: (850) 245-0450 **Grant Funding Resources** 

# • U.S. Department of Education Grants

• Office of Educational Technology

#### **NATIONAL EDUCATION TECHNOLOGY PLAN**

The U.S. National Education Technology Plan is a key policy document outlining equitable access, technology integration, and leadership for educational advancements across the country.



#### **TOP EDUCATION & EDTECH COMPANIES IN FLORIDA (2024)**

• Full Sail University

#### **ADDITIONAL CONFERENCE OPPORTUNITIES**

Education technology conferences provide high-value networking and learning opportunities. Many conferences are now accessible virtually, making industry insights more widely available.

#### **Key Online Conference Directories:**

- EdSurge
- North America Online Conferences
- MindShare Learning Can/Am Report

