

Tyton Partners K-12 Teacher Pulse Survey June 2021



June 2021

INVESTMENT BANKING + STRATEGY CONSULTING

About the survey

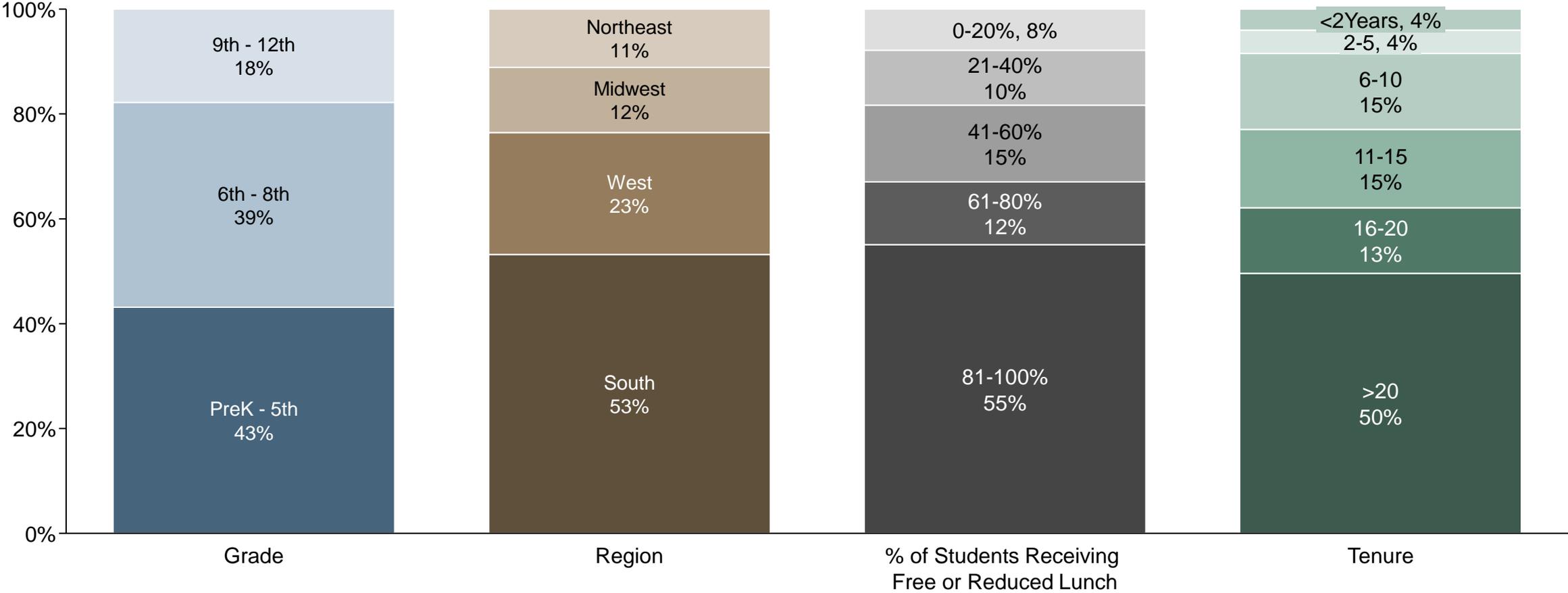
- Tyton Partners launched a short nationwide online survey to teachers of PreK-12 students in early June to better understand the changes in teaching practice over the past year and anticipated technology usage going forward
- Survey questions focused on several issues including, but not limited to:
 - Reflections on the past year, including challenges and gains
 - Top priority areas for the upcoming year
 - Tools and resources teachers anticipate relying on moving forward
- Respondents included more than 315 teachers from 42 states serving grades PreK-12 with multiple lengths of tenure
- Percentage of students receiving free or reduced lunch in a school was used as a proxy for socio-economic make-up of a school; other demographic data of a school (e.g., number of students, locale) were not collected
- In appreciation for respondents' participation, Tyton Partners has donated to Connected Nation, a national non-profit organization helping schools and school districts access funds for connected classrooms
- If you have any questions about the data or would like to continue the conversation, please contact Managing Partner Adam Newman at anewman@tytonpartners.com

Key observations

- **Teachers report that their performance – along with student outcomes – fell short of expectations during academic year (AY) 2020-21**
 - Nearly half (46%) of teachers reported being less effective in AY 20-21 than in previous years; 66% report students experienced less academic growth than during a typical year
 - Teachers with 20+ years of experience were the most negatively impacted with half of them reporting that they fell short of expectations
- **There were, however, significant gains in some areas of practice such as technology and workflow efficiency**
 - Nearly 90% of teachers reported their performance improved as it relates to incorporating technology into instruction; nearly 60% improved “their own efficiency and workflow”
- **Moreover, teachers will continue to use many of the tools and techniques they incorporated as a result of the pandemic**
 - 99% of teachers plan to continue using new tools and techniques that they adopted as a result of Covid-19
- **Teachers anticipate relying even more on learning management systems (LMS) and other classroom management tools (e.g., behavior, participation), even as use of interactive video tools (e.g., Zoom, Microsoft Teams) will decline with a return to schools**
 - 80% of teachers report LMS systems will be important to their practice next year, consistent with this current year; 70% report classroom management tools will be important – a 12% increase from this current year
 - Compared to this year, 36% fewer teachers believe video conferencing tools will be important to their practice next year
- **Top priorities heading into next year include increasing student engagement and building relationships with students**
 - 43% of teachers listed increasing student engagement as a top priority and 39% listed cited relationships with students

Survey demographics overview

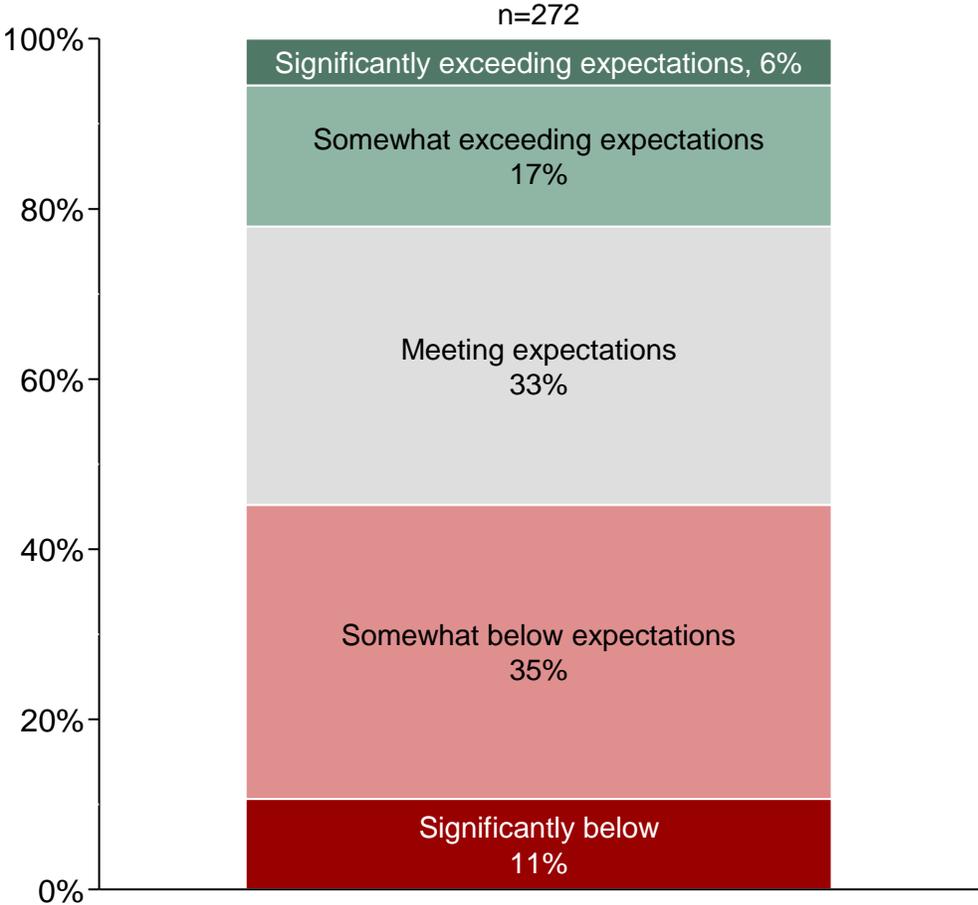
Survey Demographics



Notes: 303 total respondents shared demographic information
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Relative to a typical academic year, nearly half of teachers report their effectiveness as an instructor was compromised this past year

Effectiveness as an instructor relative to expectations this academic year (2020-21)*



Teachers particularly struggled with technology and collaborative learning models

“My biggest challenge was the use of **technology and being able to teach young children how to use it** to complete their work.”
- 3rd grade teacher, public school

“We were forced to build a virtual program, from scratch, while teaching. Basically, we [pursued a] **build the plane while flying it** scenario that led to many changes and frustrations.”
- 8th grade teacher, public school

“Much of what I do is based on **large group collaboration** to push ideas and strategies. This was a **huge challenge**.”
- 3rd grade teacher, public school

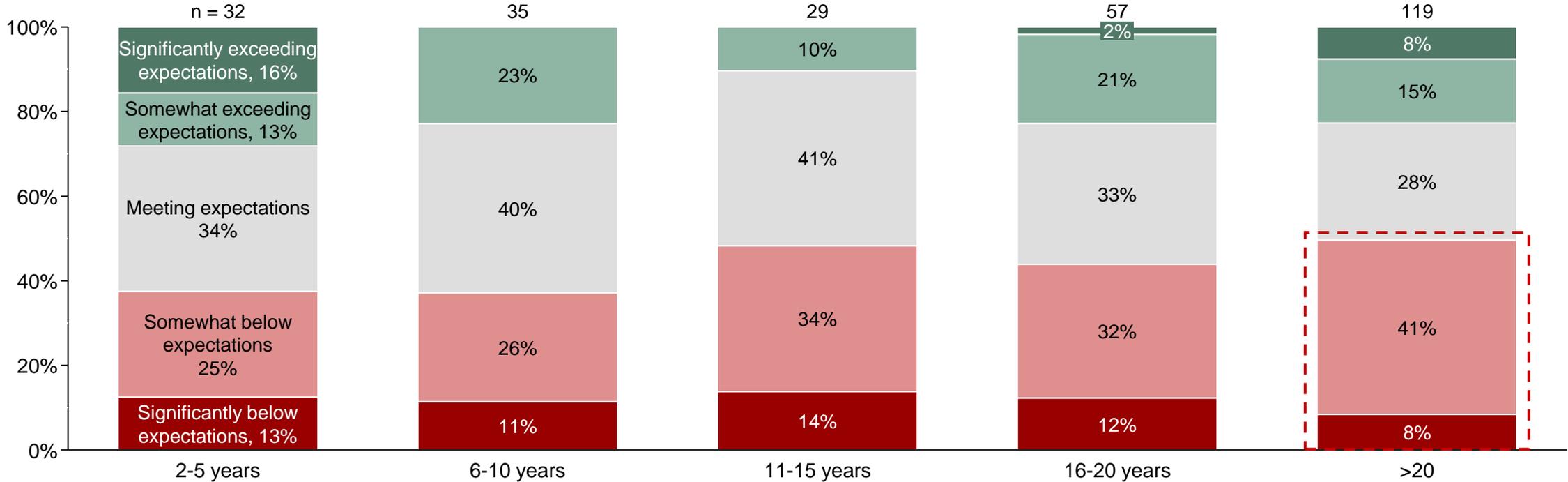
“**I couldn’t work with small groups** due to social distancing, so it was much more difficult to differentiate.”
- 1st grade teacher, public school

Note: *Question: “Relative to a typical academic year, how effective were you as an instructor this current academic year (‘20-‘21)?”, n= 272
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Teachers with longer tenure were slightly more likely than newer teachers to report effectiveness below expectations

Effectiveness as an instructor relative to expectations this academic year (2020-21)* by teacher tenure

While its possible veteran teachers are less comfortable with technology, some may simply expect more of themselves

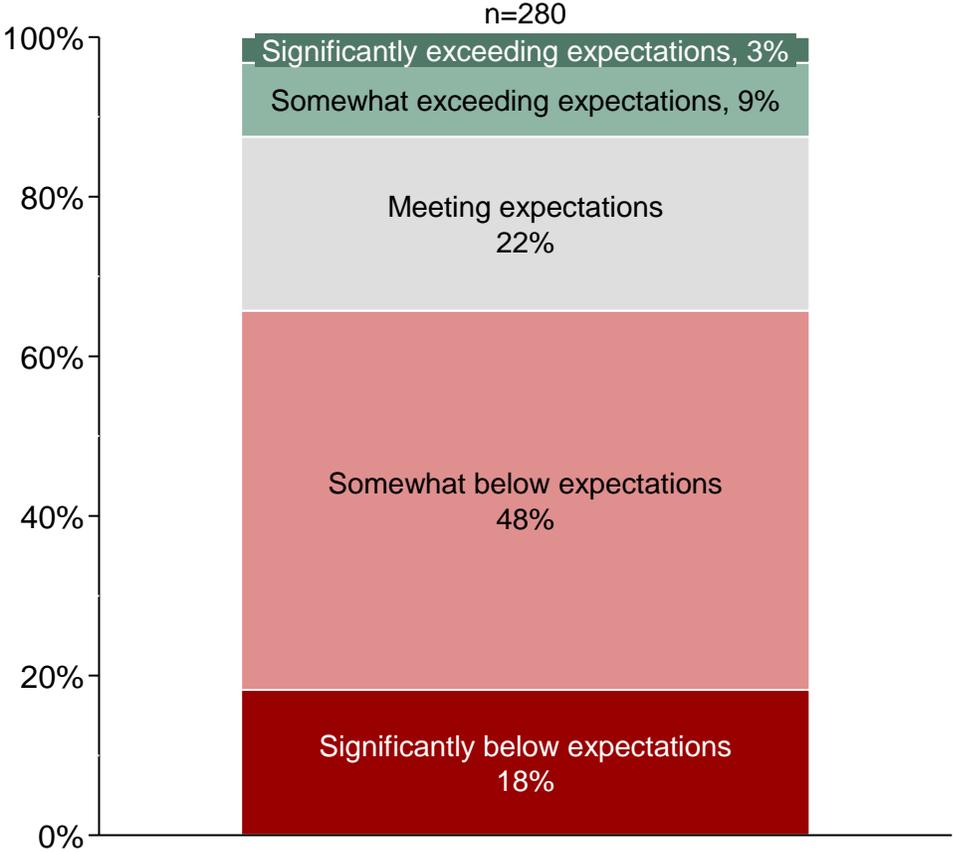


Suppliers should consider how needs shift among various segments of the teacher workforce

Notes: *Question: "Relative to a typical year, how effective were you as an instructor this current academic year ('20-'21)?"
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

More than two-thirds of teachers report student outcomes fell short of grade-level expectations

Student growth relative to grade-level expectations this academic year (2020-21)*



Major learning challenges included student engagement and parental support

“A lot of students just didn’t **show up to remote classes**, some **parents didn’t support** our efforts to engage students, there were **internet issues**, and others just had **difficult home environments** that made it hard to focus.”
- 7th grade teacher, public school

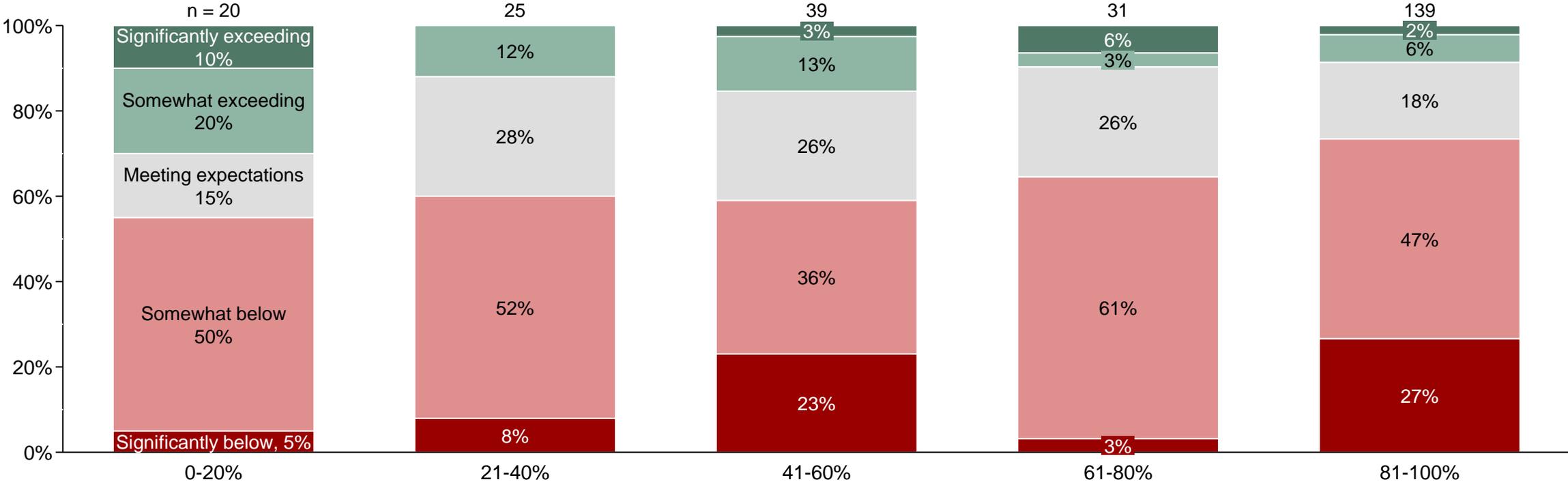
“Finding quality materials on par with students’ **individual learning levels** was a major challenge. Dealing with **students’ apathy**, or **family situation**, was greater this year than in the past.”
- 12th grade teacher, public school

“The fundamental challenge was getting students to **attend classes** and **complete assignments** in a timely manner.”
- 6th grade teacher, public school

Note: *Question: “Relative to grade-level expectations, how would you describe your students’ academic growth this current academic year (‘20-‘21)?”, n= 280
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Teachers at schools with high percentage of free and reduced lunch were more likely to report student growth as significantly or somewhat below grade-level

Student growth relative to grade-level expectations this academic year (2020-21)* by FRL percentage**



While school communities with high free and reduced lunch populations face acute challenges, the need for remediation and intervention is universal

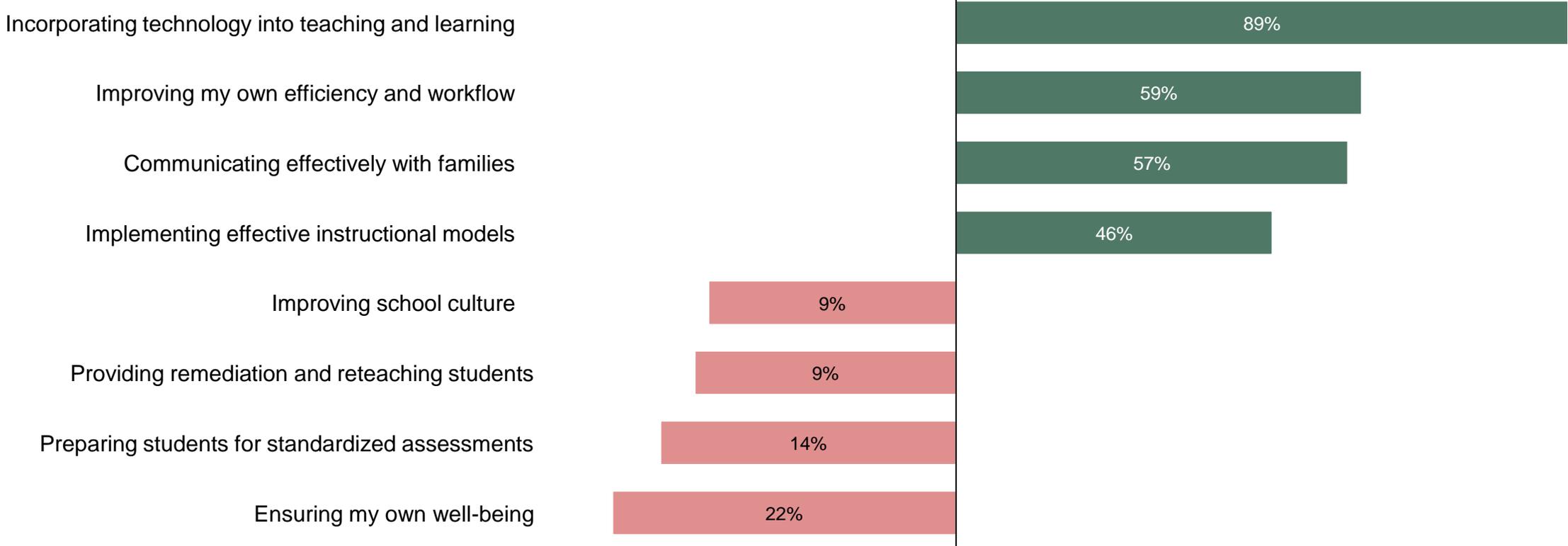
Notes: *Question: "Relative to grade-level expectations, how would you describe your students' academic growth this current academic year ('20-'21)?"; **Question: "What percentage of your school's students are eligible for free and reduced lunch?"
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Reflecting specifically on their practice, teachers report gains in their ability to use technology and work efficiently; on the downside, personal well-being suffered

Changes in performance this academic year (2020-21) relative to prior years, by area of practice*

Performance declined

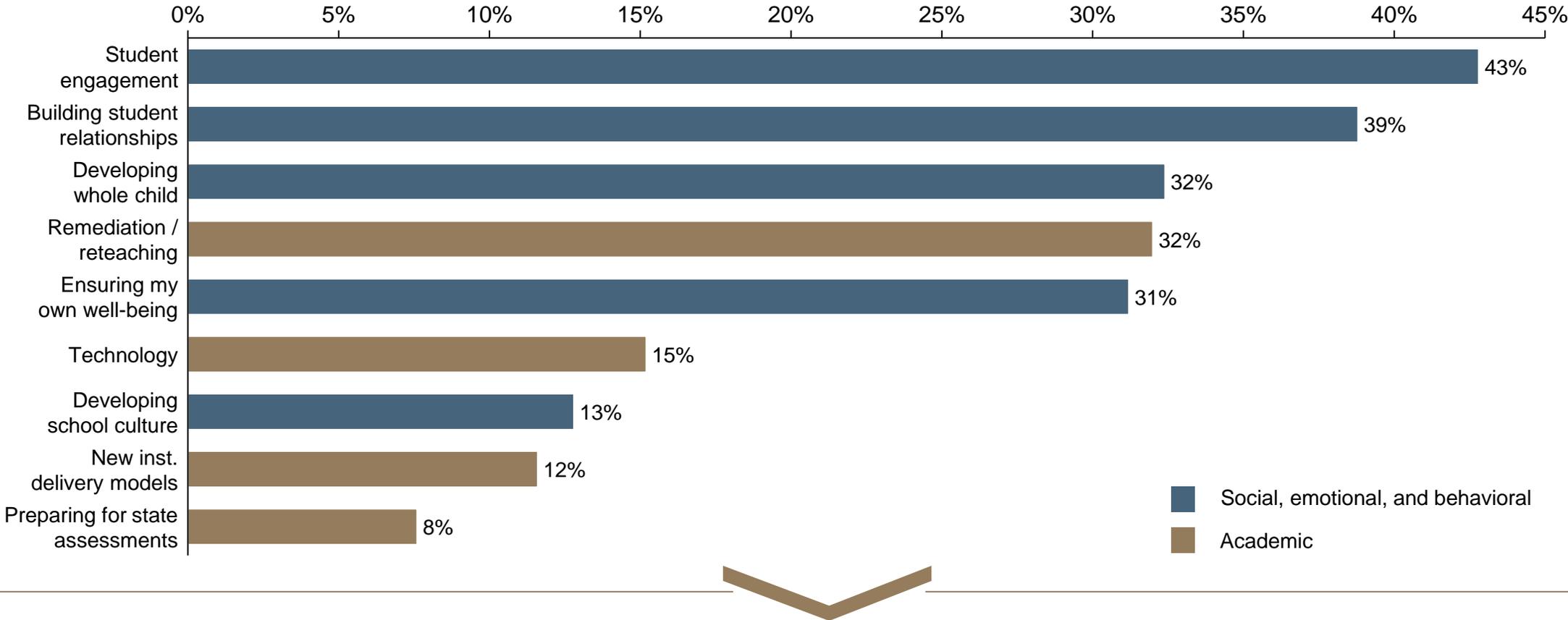
Performance improved



*Note: *Question: "How has your performance in the following areas changed this year ('20-'21) relative to your past performance?", n = 254; Only practices are the high and low end of ranges are shown above*
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Teachers cite social, emotional, and behavioral issues as their top priorities for next year; academically, teachers are most focused on remediation

Top priorities heading into next year (2021-22)*

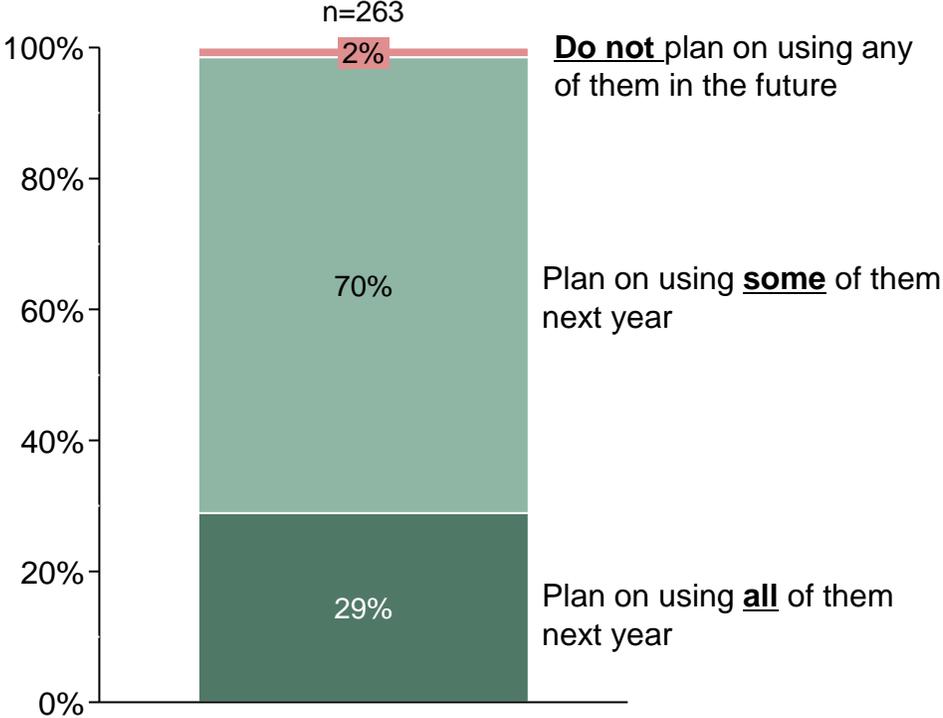


From teachers' perspectives, initial emphasis next year may be on students' health and well-being, as much or more so than academic issues

Note: *Question: "What are your top priorities as you heading into next year ('21-'22)? Please select up to three.", n= 250
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Nearly all teachers report that they will continue to use new instructional tools and techniques that they incorporated as a result of the pandemic

Anticipated use of new instructional tools and techniques next year*



Teachers plan continued use of technology and other new learning models

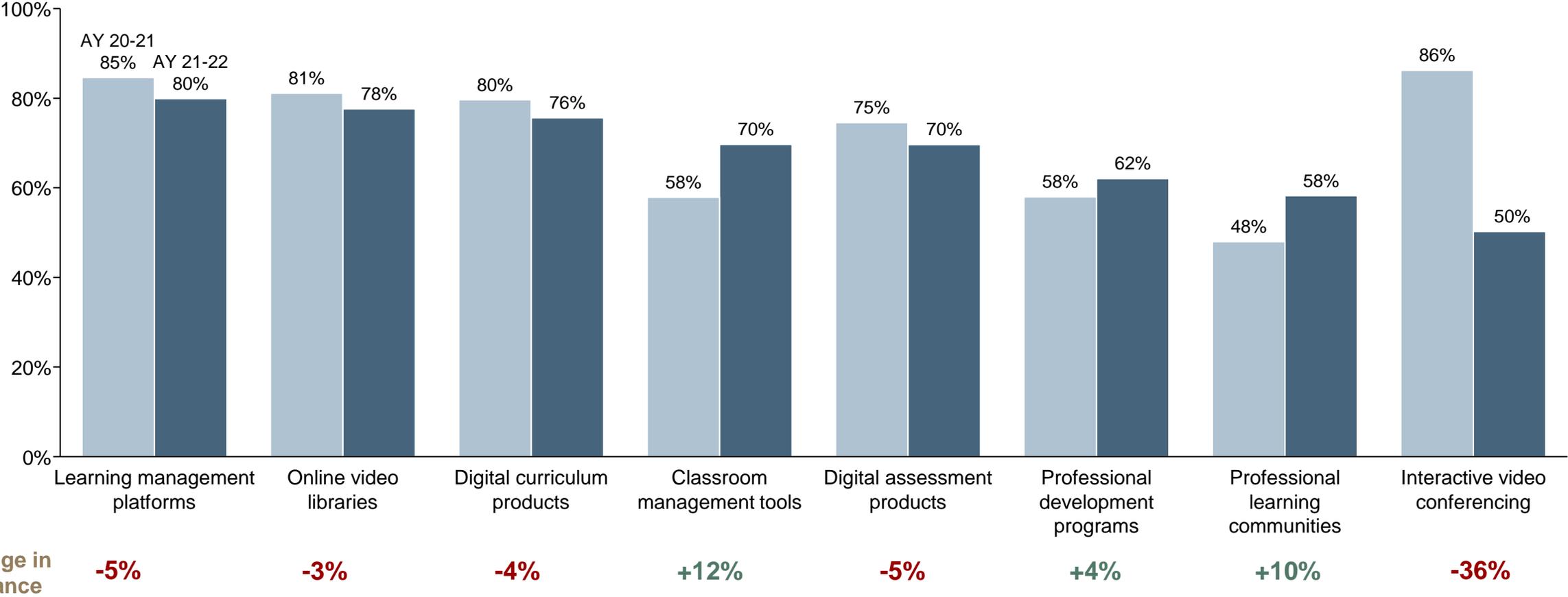
- “**The incorporation of technology** to implement individualized learning and remediation plans has been a game-changer this year.”
- 11th grade teacher, charter school
- “By switching to distance learning, I learned to **embrace technology** in ways that **actually impacted learning and growth.**”
- 2nd grade teacher, public school
- “**I was able to process my content in a new way** by creating lessons differently. I want to experiment with flipped/ blended learning and **incorporate more of that next year.**”
- 9th grade teacher, charter school

While the pandemic has posed undeniable challenges, teachers are embracing certain shifts in their practice

Note: *Question: “Which of the following statements do you agree with most relative to how your practice has evolved this current year (‘20-’21)?”, n= 263
Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Teachers have relied on various digital tools and resources to support their practice; in most cases, their importance will persist or expand

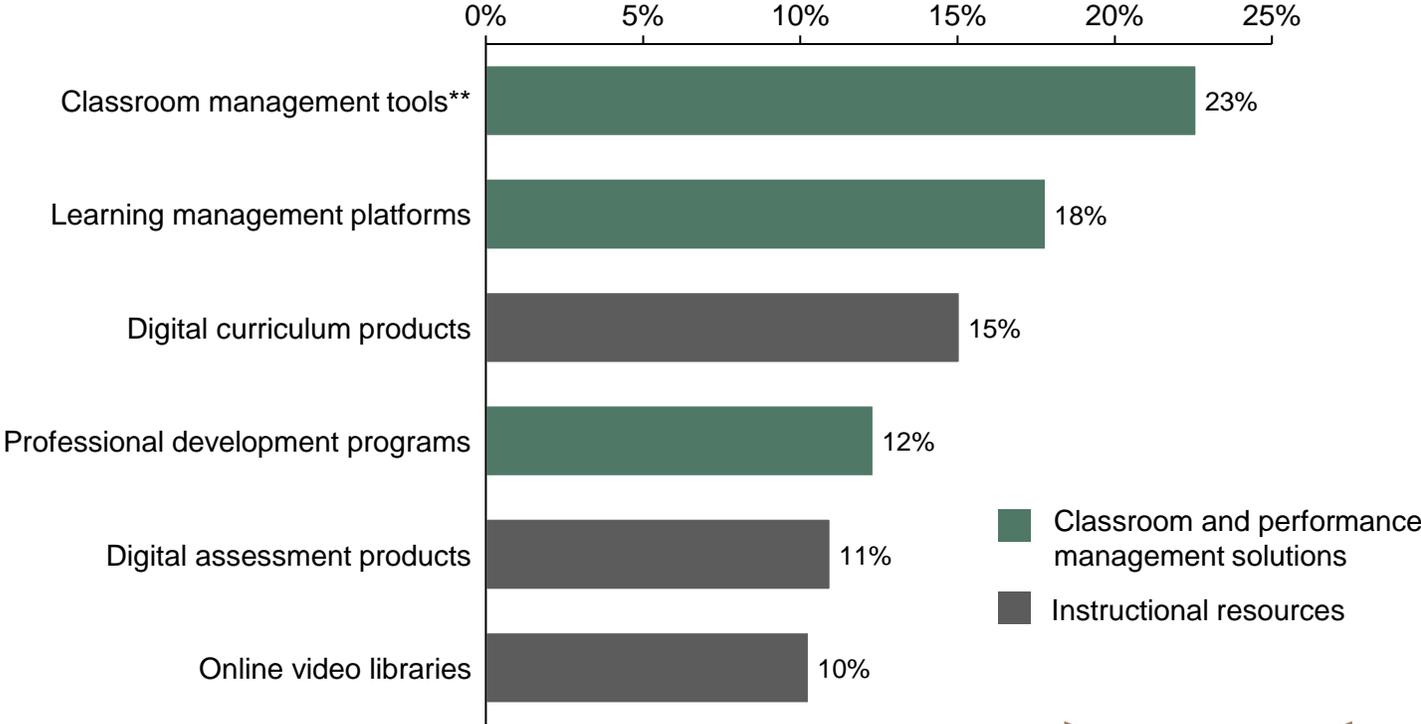
Percent of respondents indicating tools and resources were important
 This academic year (2020-21)* and next academic year (2021-22)**



Note: *Question: "Please rank how important the following tools and resources have been to your practice in this current academic year ('20-'21)", n = 238; **Question: "Please rank how important the following tools and resources will be to your practice this upcoming academic year ('21-'22)", n = 229;
 Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

Teachers are most likely to report classroom management and LMS platforms as their most valuable resource moving forward

Most valuable solutions for next academic year (2021-22)*



“A **classroom management tool** is essential to monitor which students are truly engaged.”
- 6th grade teacher, public school

“A **learning management system** is another way to build community and have a common area for all.”
- 4th grade teacher, public school

“The pandemic has shown how important **digital curriculum products** are. By moving online, I have had more time to provide feedback.”
- 4th grade teacher, public school

“As we move back into the classroom, it is extremely important to have **professional development** to make it successful.”
- 4th grade teacher, public school

Suppliers of content-agnostic platforms and various teacher “dashboard” solutions should maintain momentum

Notes: *Question: “Which do you anticipate being most valuable to your practice this upcoming year?”, n = 146; **Defined as behavior management and student participation solutions
 Sources: Tyton Partners K-12 Teacher Sentiment Survey, June 2021

About Tyton Partners



Leading advisory firm providing investment banking and strategy consulting services to companies, investors and institutions across the global knowledge sector

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INVESTMENT
BANKING



RELENTLESS DRIVE for IMPACT and OUTCOMES

Tyton Partners by the Numbers



\$10B in Education Deals

400 + Strategy Consulting Engagements Globally

300 + Clients

70+ Employees

30+ Published Studies

6 Continents

5 Offices;
HQ: Boston, Stamford

Tyton Partners Solution Set

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Investors



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Go-to-Market Planning



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Buy-Side Analysis & Execution



Corporate Divestitures



Valuation & Fairness Opinions