RETHINK CHANGE:

Accelerating Education Technology Adoption in K–12 Private Schools

blackbaud®

In all aspects of life, from groceries to doctors and the way we work, the pandemic is accelerating technology adoption.

Contents

FOREWORD

BY TRAVIS WARREN

Anyone predicting a fall enrollment boom last spring would have been greeted with skepticism, yet today, many schools are over-enrolled as families seek alternative options. Frankly, most private schools rose to the challenge of pandemic learning last spring and have continued to meet the obstacles of reopening this fall. If COVID-19 has taught us anything, it's to expect the unexpected.

*President & GM,
Blackbaud K–12*

So now, what's next?

That question motivated us at Blackbaud to partner with YouGov for this study. Helping schools deliver an exceptional family experience through digital transformation has been a motivating theme for us for years. So rather than survey school leaders, we decided to focus on families.

In all aspects of life, from groceries to doctors and the way we work, the pandemic is accelerating technology adoption. This is very much true in K–12 education. We've seen a dramatic increase in the use and utilization of Blackbaud's LMS capabilities, such as class topics, assignments, and online discussion boards, as well as a massive increase in video uploads. And while usage in all areas may not sustain at current levels, it's safe to say they won't go back to the way they used to be. We're going from a new temporary normal to the next normal.

Our study shows that family expectations regarding school investment in technology has shifted. Can we imagine returning to a day when assignments are not available online or academic progress isn't available to families on a real-time basis? Today's families can't either.

So how should school leaders consider using the information in this report? There are a few salient

takeaways I recommend considering:

- Typical enrollment norms have been disrupted. You're likely seeing new families join your community. This is great, but it introduces re-enrollment risk. How are you going to retain both new and returning families? It's also likely to impact your tuition revenue and financial aid forecasts as the mix of families evolves.

- Attitudes toward the digital experience of education have changed—from learning management to communications. Prospective families are now more likely to consider the digital experience you deliver in their evaluation.

- Ultimately, the value proposition of your school won't change, but it may be more important than ever for you to clearly understand and communicate your mission.

Finally, I would be remiss if I didn't acknowledge the amazing work of so many school leaders to prepare for opening this fall (in whatever form that has taken). Thank you for everything you're doing to move your institutions forward and educate!

Project Overview and Methodology

This report is the result of a survey conducted by YouGov on behalf of Blackbaud K–12 Solutions. The study's purpose was to understand how the COVID-19 pandemic has impacted the way families view and value K–12 education. The survey included 7,450 parents with children in kindergarten through the completion of eleventh grade, approximately 700 of which attended private schools in the past academic year.

Data collection occurred between August 15 and August 24, 2020. The full sample was then weighted to nationally represent all K–12 parents in the United States and Canada. The final model of private school parents was weighted to ensure it reflected general information about the private school market, including typical norms for grade levels, type of school (religious versus non-religious), and child gender.

Key Findings

Parent expectations are evolving as a result of COVID-19. Many believe the increased educational technology usage, school communication, and insight into their child's day-to-day learning should continue after the pandemic is over. Schools falling short of expectations during COVID-19 has already led one in five families to switch schools. The good news is that the vast majority of private school parents are satisfied with how their schools have risen to the challenge.

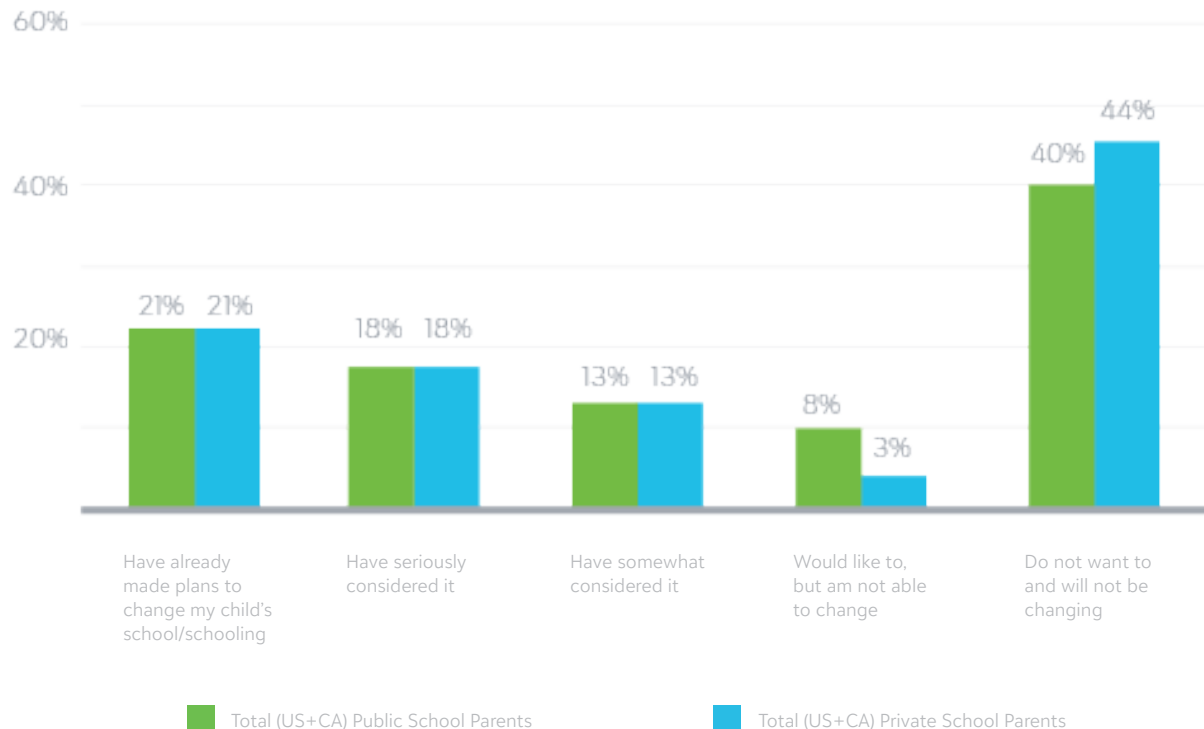|	
85%	of private school parents were satisfied with how their school handled education during the spring of 2020, compared to 73% of public-school parents.
21%	changed schools for the 2020-2021 academic year due to COVID-19.
51%	of public school families considering private schools are doing so due to their school's response to COVID-19.
71%	say educational technology has become more important to them.
85%	expect teacher communication at least once a week.
59%	want daily access to their child's grades.
85%	are interested in competency-based learning.
76%	of private school parents are satisfied with the value they are getting from private school.

Evolving Parental Expectations

By and large, parents of all school types were pleased with their school's response to the COVID-19 pandemic in the spring of 2020. Eighty-five percent of private school parents and 73% of public school parents reported being "satisfied" or "very satisfied." Of the "very satisfied" respondents, the performance gap widened, with 44% of private school parents selecting this option compared to 25% of public school families.

Private School Parents

85%

"very satisfied/ satisfied"
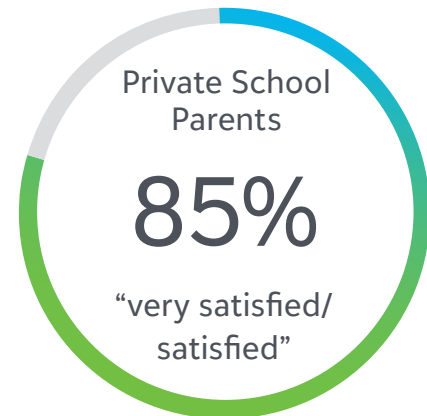
While parents understood the unprecedented circumstances placed upon K–12 schools in the spring of 2020, the uncertainty surrounding the 2020–2021 school year and the long-term health, safety, and educational implications of various in-school, remote, and hybrid scenarios led many families to re-evaluate their options. By the time of the survey in the second half of August, more than half of public and private school families considered changing schools, and one in five families had already decided to switch.

Figure 1: The likelihood of families to change schools as a result of COVID-19.

Bar chart comparing Total (US+CA) Public School Parents and Total (US+CA) Private School Parents:
- Have already made plans to change my child's school/schooling: 21% / 21%
- Have seriously considered it: 18% / 18%
- Have somewhat considered it: 13% / 13%
- Would like to, but am not able to change: 8% / 3%
- Do not want to and will not be changing: 40% / 44%

Aggregated year-over-year private school data from Blackbaud Enrollment Management System™ corresponds to the survey findings as application and contract activity dropped significantly in March,

April, and May while families took stock of the situation, rebounding in June and July as deadlines loomed and reopening plans emerged.

Of the private school families that considered new schools, 56% percent considered another private school, whereas 23% of public school parents looked to switch from public to private. These figures represent a sizable disruption in the normal enrollment trends for private school and point to an aggregate enrollment surge for private schools this fall.
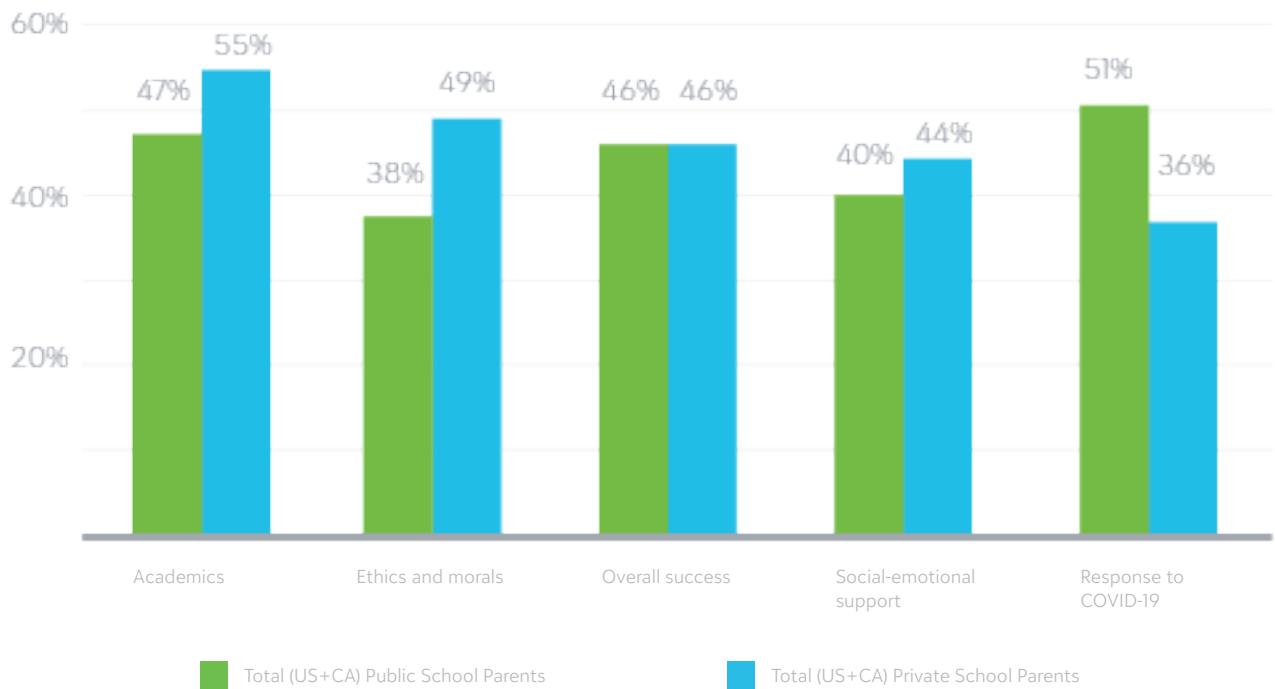
Figure 2: The types of schools being considered as a result of COVID-19.
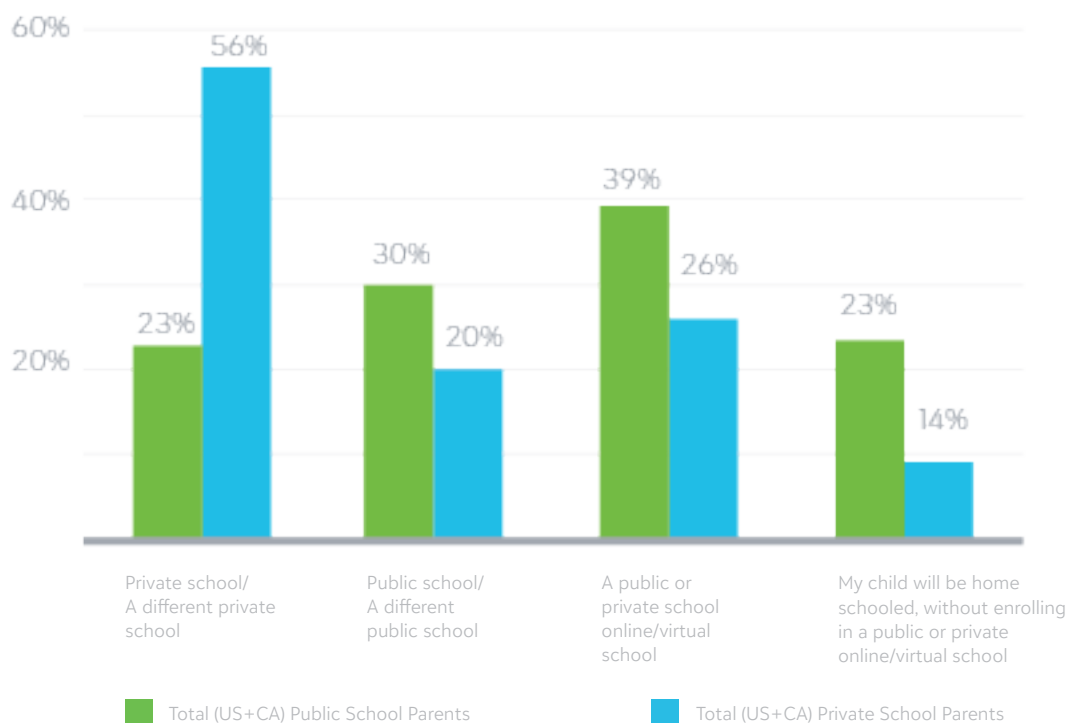
Given the widespread enrollment disruption, we sought to understand parents' motivating factors for choosing new schools. Public school families ranked the school's response to COVID-19 as the top reason they turned to private schools. However, private school families prioritized academics, ethics, and overall success, listing the school's pandemic response as one of their least important decision-making factors.
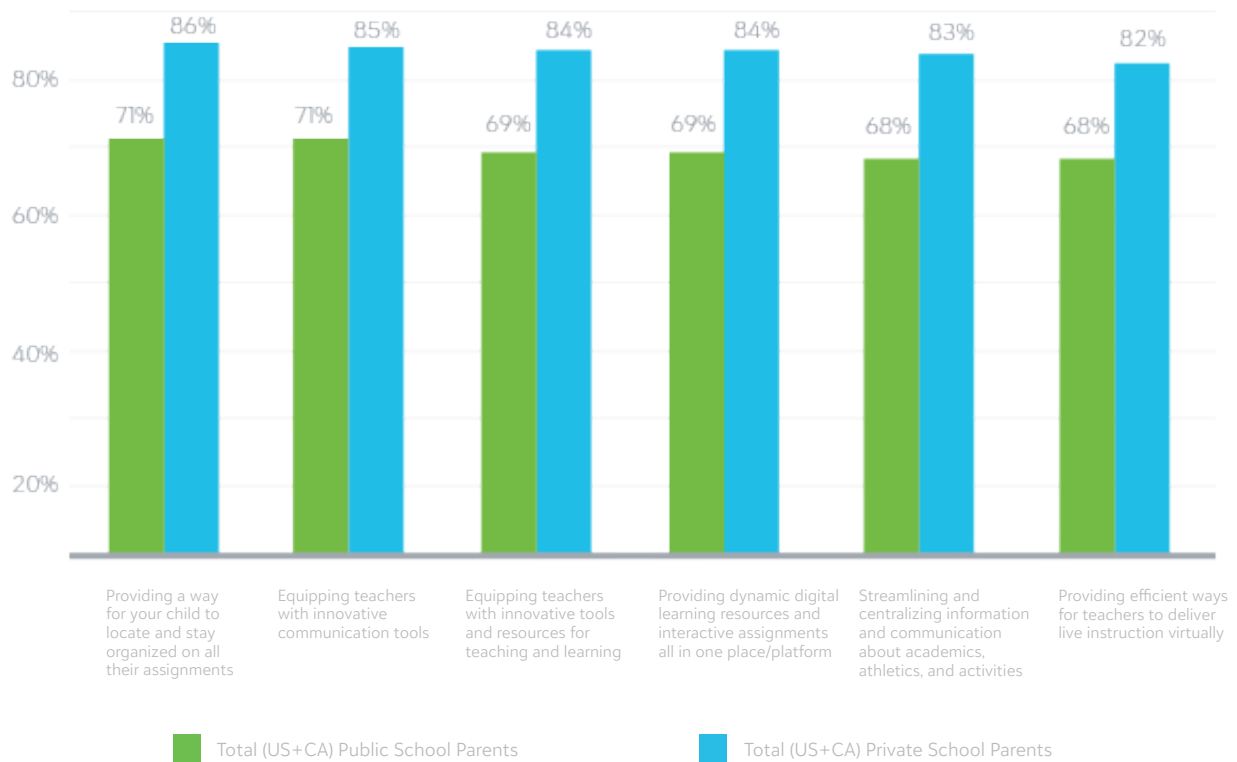
Figure 3: The most important reasons for considering a private school.

Academics: 47% (Public), 55% (Private)
Ethics and morals: 38% (Public), 49% (Private)
Overall success: 46% (Public), 46% (Private)
Social-emotional support: 40% (Public), 44% (Private)
Response to COVID-19: 51% (Public), 36% (Private)

Total (US+CA) Public School Parents   Total (US+CA) Private School Parents

Digging deeper, private school parents reported higher overall satisfaction levels with their school's distance-learning performance than their public school counterparts throughout the criteria listed in Figure 4. It's also noteworthy that in the combined "very satisfied" and "satisfied" percentages, private school parent responses were roughly evenly dispersed amongst these two options. In contrast, public school parents answered "satisfied" over "very satisfied" at a two-to-one ratio.

Figure 4: The satisfaction with various elements of the COVID-19 distance learning experience.

| | 71% / 86% | 71% / 85% | 69% / 84% | 69% / 84% | 68% / 83% | 68% / 82% |

Providing a way for your child to locate and stay organized on all their assignments

Equipping teachers with innovative communication tools

Equipping teachers with innovative tools and resources for teaching and learning

Providing dynamic digital learning resources and interactive assignments all in one place/platform

Streamlining and centralizing information and communication about academics, athletics, and activities

Providing efficient ways for teachers to deliver live instruction virtually

■ Total (US+CA) Public School Parents   ■ Total (US+CA) Private School Parents

If not because of COVID-19, what then was the impetus for private school families to switch schools?

Two theses seem most promising to consider, though they were not specifically tested for in our survey. Given the widescale reports of relocation happening during the pandemic, particularly from cities to suburban locations, it's altogether possible that families are enrolling children in schools closer to their new home. The second consideration is that in a time of change, families might be more open to making a switch they might otherwise not.

Regardless of the specific reasons, the disruption provides an opportunity for private schools to win over their newfound public school families for the long haul, as well as reduce attrition risk from their incumbents. The key to making the most of these opportunities is to understand and act upon parents' evolving expectations.

State of Reopening

8 in **10** private school students started the year with some in-person learning.

89% of families were comfortable with the safety measures schools put in place, such as masking and social distancing protocols.

Accelerated Technology Adoption

It's said that necessity is the mother of invention, or in this case, accelerated adoption. Many students, schools, and families received a crash course in educational technology over the last six months, as a variety of applications became a critical component of the school experience at all levels. Our study suggests many of these changes will have staying power. Seventy-one percent say technology for teaching and learning has become more important to them (figure 5).

Figure 5: The changing views of technology due to COVID-19.
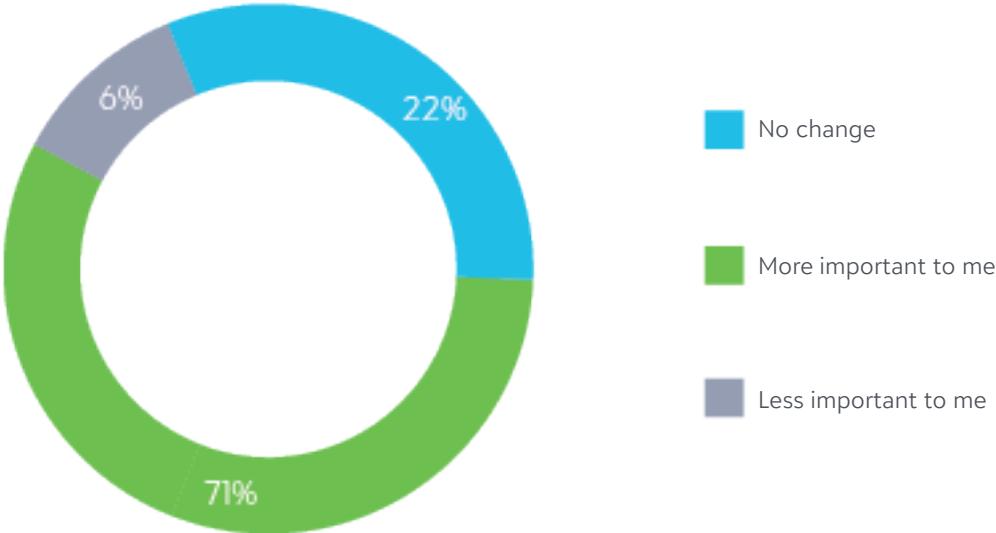
Readers who've tired of endless Zoom meetings may find this level of enthusiasm for technology questionable. Indeed, it's worth keeping in mind that for the purposes of our survey, Zoom (or other such platforms) may be the learning tech they have in mind. Perhaps that's why while 71% report generally positive sentiment toward technology for education—identifying with the terms "confident" (47%), "excited" (37%), and "enthusiastic" (31%)—33% identify with terms like "overwhelmed" (16%), "nervous" (14%), and "hesitant" (14%). These attitudes are important for school technology leaders to keep in mind going forward.
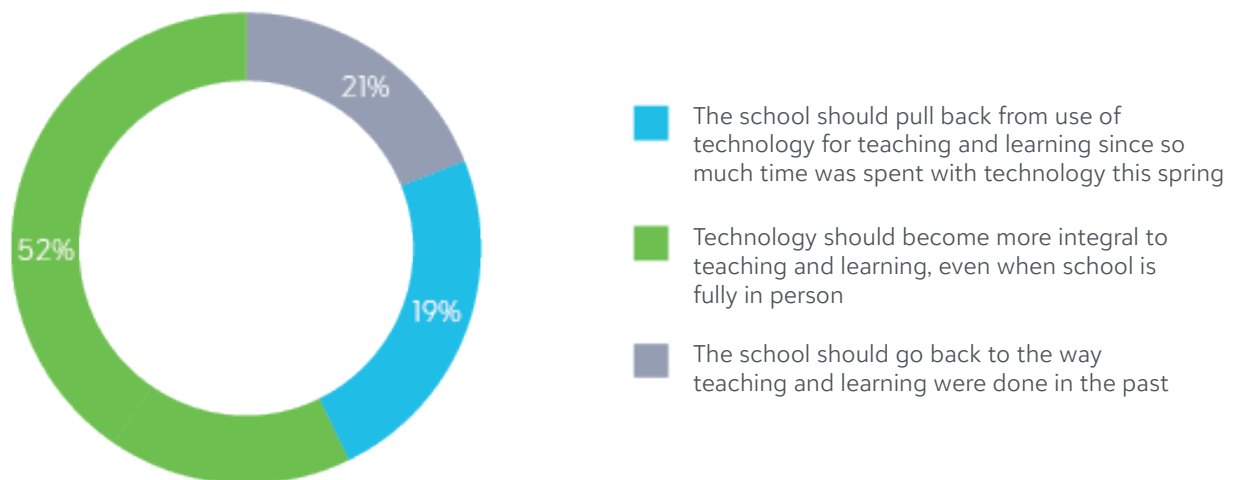
Getting past Zoom meetings and double-clicking into a more granular view of the role of technology, families indicate high value for technologies that support student engagement and creating a personalized learning experience (specifically in the context of how important these technologies might be in the consideration of a school, figure 6).

Figure 6: The importance of EdTech usage when selecting a K–12 school.
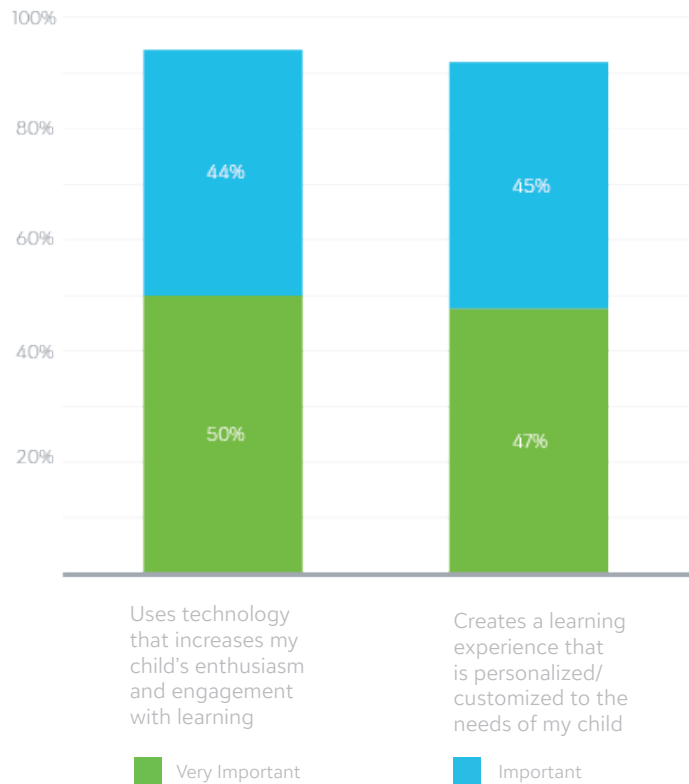
Most private school parents view educational technology as more than a COVID-19 phenomenon. Looking forward, 52% of respondents say EdTech should continually become more integral to teaching and learning. Another 19% see its place but would like schools to pull back on the reigns to counter-balance the heavy exposure of virtual meetings and online learning games during the pandemic.

Figure 7: The expectations for technology usage in teaching and learning moving forward.

- The school should pull back from use of technology for teaching and learning since so much time was spent with technology this spring

- Technology should become more integral to teaching and learning, even when school is fully in person

- The school should go back to the way teaching and learning were done in the past

The parents who said they felt "confident," "excited," or "enthusiastic" about EdTech correlate to those wanting technology to play a larger role in teaching and learning. These same parents believe students should have access to all learning resources online (54%). Want the school to provide an online hub to access their child's educational information (53%). And would like their school to be deliberate and thoughtful planning future technology needs (49%).

When asked about their desire to stay informed of their child's academic progress, the 42% majority believe they should have on-demand online access, and only 11% are willing to settle for updated grades less than once a week.

Figure 8: Parent expectations for accessing updated student progress
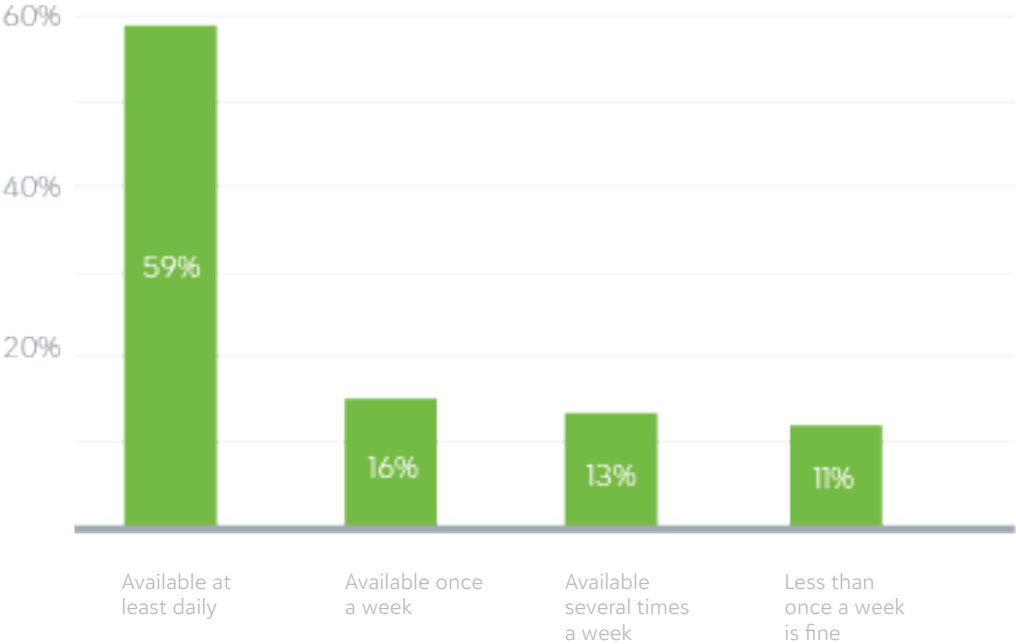
The high level of school-parent communication during the pandemic has also raised the bar. A whopping 84% of private school parents surveyed now expect to receive teacher updates at least once a week, and 70% prefer these messages via email.
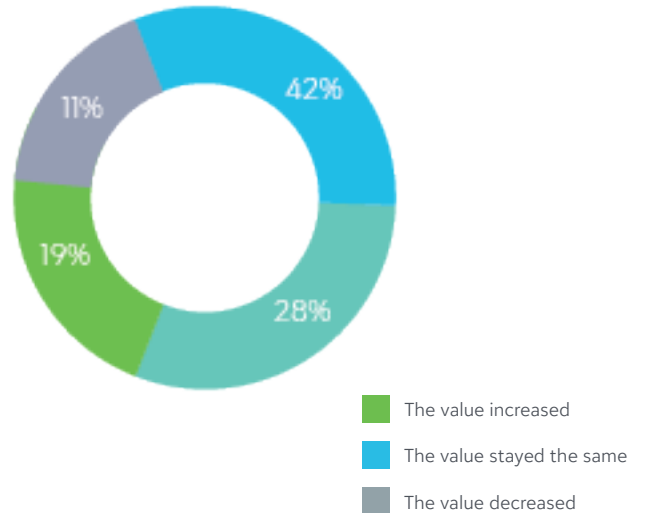
Figure 9: Parent expectations for school communication.

Preferred frequency of receiving messages or updates from teachers

- Daily — 23%
- Several times a week — 32%
- Once a week — 30%
- Once every two weeks — 8%
- Once a month — 1%
- Once a semester — 1%
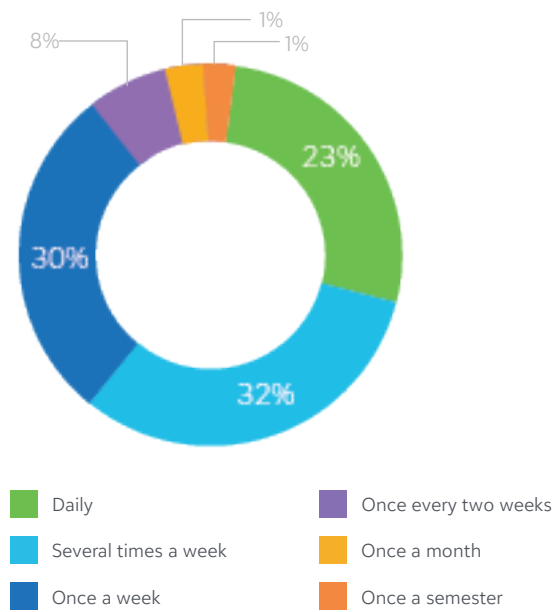
Preferred mode of communication from schools

- The value increased — 19%
- The value stayed the same — 42%, 28%
- The value decreased — 11%

Private school parents understand the educational technology capabilities that could be available to them. When asked to select the investments they'd like their schools to make from the options in the table below, having a single platform for all teaching and learning resources tops their wish list.

Figure 10: How parents expect private schools to continually invest in educational technology.

56%	Flexible digital teaching and learning resources that are all in one place/technology platform.
56%	Interactive assignments, programs, and apps for students that are all in one place/technology platform.
51%	Technology that makes it easy for me to be involved in the school community.
48%	Efficient and immediate access to my child's grades for individual assignments, tests, and grades in their classes or subjects.
45%	Innovative and flexible technology for running the school from an administrative/management perspective.
44%	Streamlining and centralizing information and communication about academics, athletics, and activities.
9%	None of these.

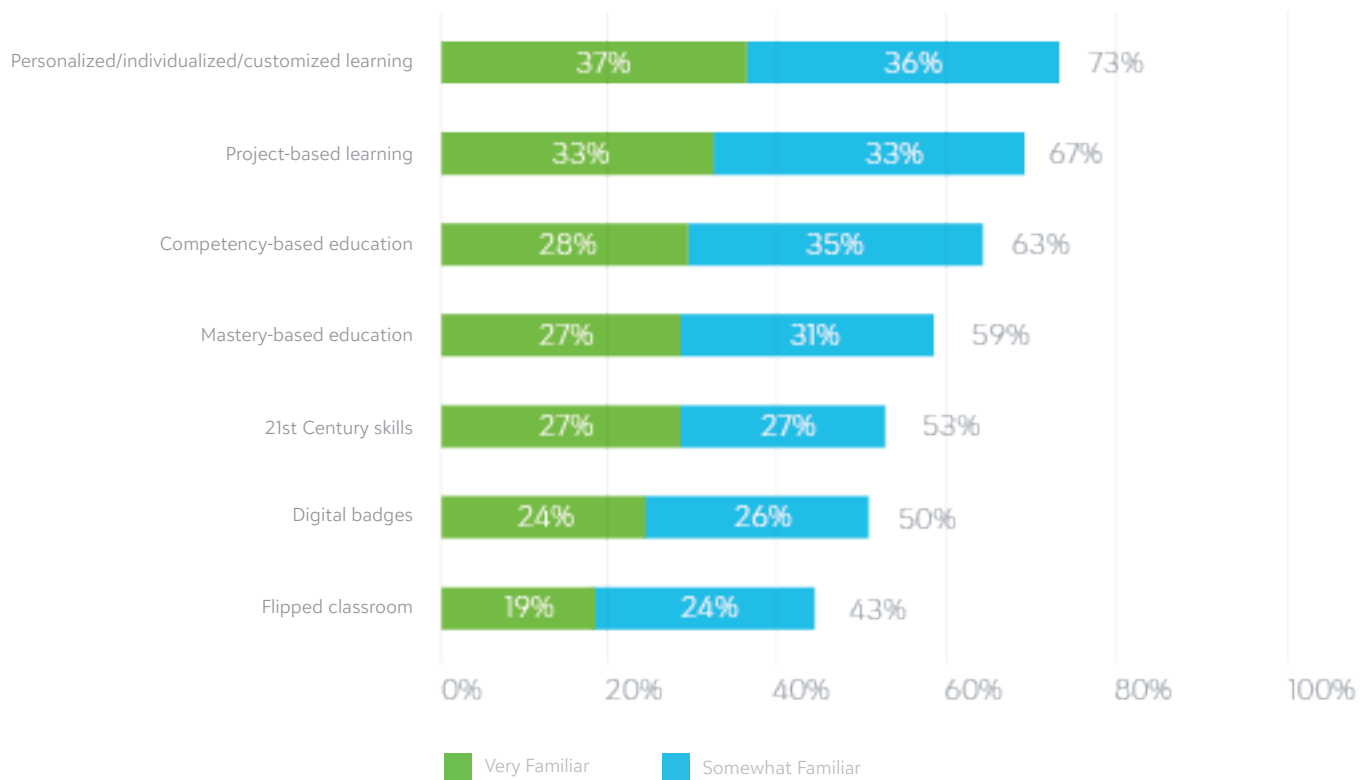Investments for improved flexibility in teaching, learning, and administration

Investments for easier access to school and student information

A Time for Change

When COVID-19 forced schools into remote modes in the spring of 2020, the question of how to effectively support and fairly assess student learning quickly rose to the forefront. Many educators found that project-based learning worked best for their subject matter, which also accelerated discussions around mastery and competency-based education.

To better understand how parents might react to schools reimagining their educational practices, we asked the private school survey respondents to rate their familiarity with various frameworks. Surprisingly, personalized learning, project-based learning, and competency-based education all received familiarity levels over 60%.

Figure 11: Private school parents' familiarity with progressive education methodologies.

	Very Familiar	Somewhat Familiar	Total
Personalized/individualized/customized learning	37%	36%	73%
Project-based learning	33%	33%	67%
Competency-based education	28%	35%	63%
Mastery-based education	27%	31%	59%
21st Century skills	27%	27%	53%
Digital badges	24%	26%	50%
Flipped classroom	19%	24%	43%

We then presented Parents with the following definition of competency-based education:

> *Competency-based education (CBE) is an instructional and curricular strategy that focuses on the mastery of skills rather than the more traditional approach of earning credits towards graduation or earning passing grades in order to advance to the next grade in sequential fashion. It brings an inquiry-based, growth-minded approach to education that promotes problem-solving skills and abilities in an individualized, differentiated, and connected way.*

Competency-Based Education in K–12 Schools

85% of private school parents are interested in CBE

73% say their schools already incorporate a form of CBE

Did they recognize CBE as a practice utilized by their school? Fifty percent said yes. Another 22% thought it sounded familiar but couldn't be sure, and 1% indicated that their school incorporates CBE but has a different name for it.

Regardless of whether or not their school practices competency-based education, did it interest them? Remarkably, 85% of private school parents indicated that they were interested, eclipsing the 73% who reported that CBE or something similar was already taking place at their school.

When demand outpaces supply, it's time for change.

Conclusion

Parents were impressed with the herculean efforts put forth by private schools to keep education alive in the face of an unprecedented pandemic. Their 85% satisfaction rate with the response to COVID-19 and the distance learning measures put in place highlights the spring of 2020 as a shining moment for K–12 private schools.

As a result, 76% percent are happy with the value received from private schools, and 43% believe this value has increased since the pandemic began.

Figure 12: Parents' perceptions of the value received from private schools.

Satisfaction with the value received from private school
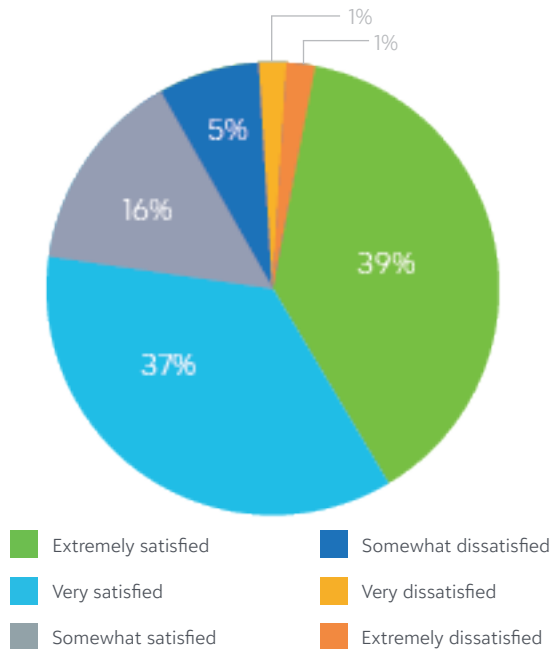
How the perceived value of private schools has changed from the pandemic

Satisfaction with the value received from private school:
- Extremely satisfied — 39%
- Very satisfied — 37%
- Somewhat satisfied — 16%
- Somewhat dissatisfied — 5%
- Very dissatisfied — 1%
- Extremely dissatisfied — 1%

How the perceived value of private schools has changed from the pandemic:
- The value increased — 43%
- The value stayed the same — 43%
- The value decreased — 14%
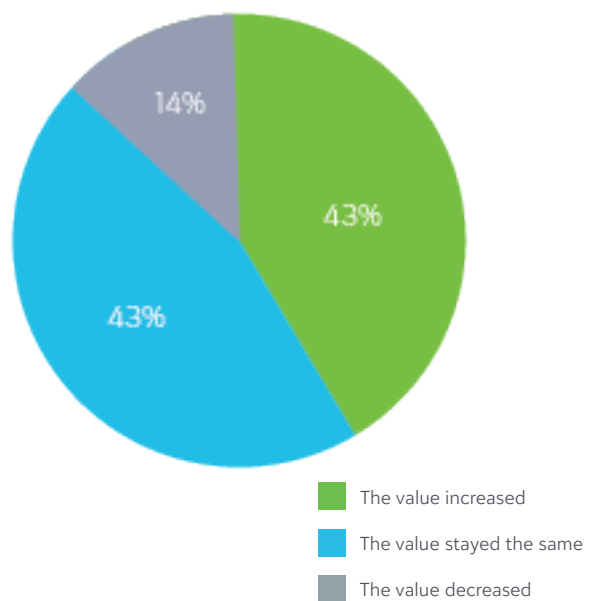
When we look back in history, we'll view the COVID-19 pandemic as a turning point in K–12 education. Many schools have already taken giant steps forward in their EdTech capabilities, and 70% of parents want this trend to continue because they've experienced how technology strengthens their partnership with the school.

Parents want to check homework assignments and updated grades nightly in one convenient location on their phones; they also value the insight gained from consistent teacher communication delivered to their inbox because it feeds their dinner conversations. These are benefits that go beyond remote— or remote ready—learning to truly deepen connections between schools and families.

Investing in an online education management system with ecosystem connectivity opens the doors to new possibilities such as online courses or a virtual summer school. These anytime, anywhere, classroom capabilities also mean that when a blizzard strikes in Boston or an air conditioning unit breaks in Houston, learning doesn't take a time out.

Not only is technology changing where and when school is available but also how we teach and learn. Before the pandemic, schools like the White Mountain School in Bethlehem, New Hampshire already had their compasses pointing toward education reform.

"Let's remember that our educational system is built on an outdated factory model," said Mike Peller, the assistant head of school for teaching and learning at The White Mountain School in Bethlehem, New Hampshire, during a presentation at Blackbaud K–12's annual EdTech conference.

"With a global pandemic wreaking havoc on our health care and economy, and systemic racism and other forms of oppression that need to be broken, we need students to have the intellectual and emotional endurance to solve the truly gnarly problems that are literally right in front of them. Therefore, what we teach, and what we assess, must match the core competencies that students require to become the thinkers. . . to become the leaders. . . and to become the community members that the world so desperately needs."
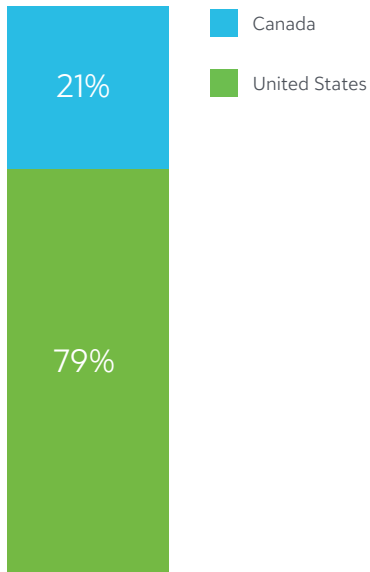
Parents are ready for this change. Viewed as a potential roadblock to education reform before the pandemic, eighty-five percent of private school parents are now interested in how competency-based education can improve their child's learning development.

In this day and age, forward-thinking schools like White Mountain School—early adopters of Blackbaud's competency-based education functionality—understand that change is ushered into fruition on the coattails of technology.
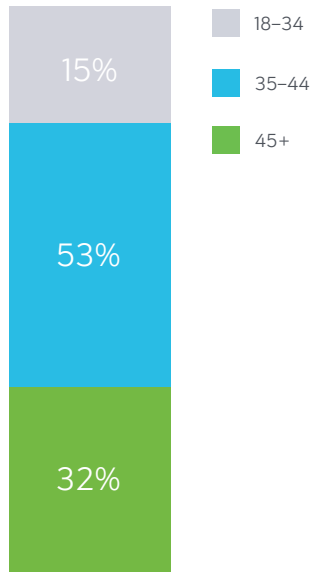
The right ingredients are in place to stir the pot, and the risk of not embracing the moment is evident. Twenty percent of families have already switched schools during the pandemic. Parents have gotten a taste for progress, and they expect private schools to deliver a better experience in the next serving. While the pandemic may have accelerated use of EdTech for learning, classroom management, and family communications, it's now up to leaders to rethink how these changes will deliver lasting benefits for their schools.
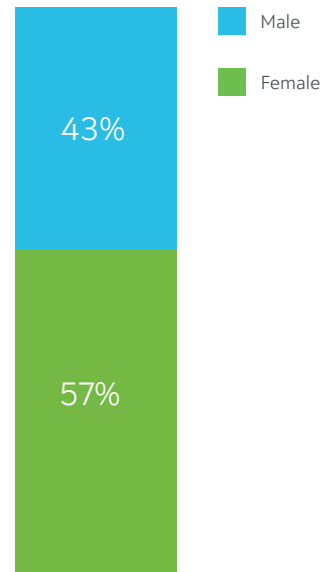
Survey Demographics

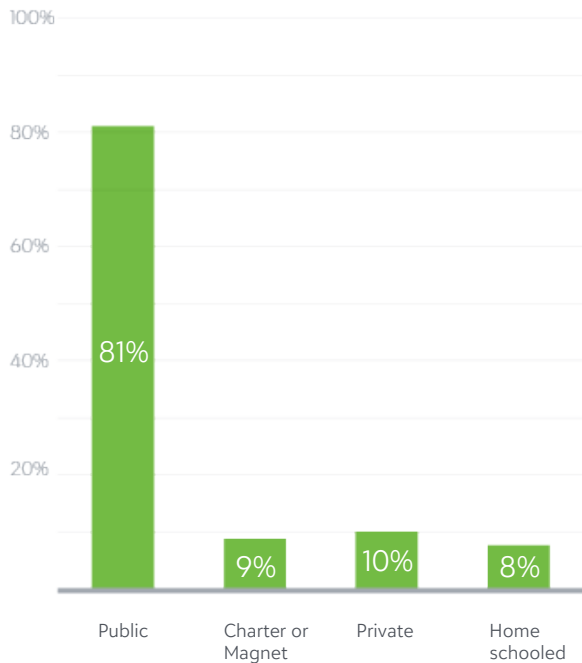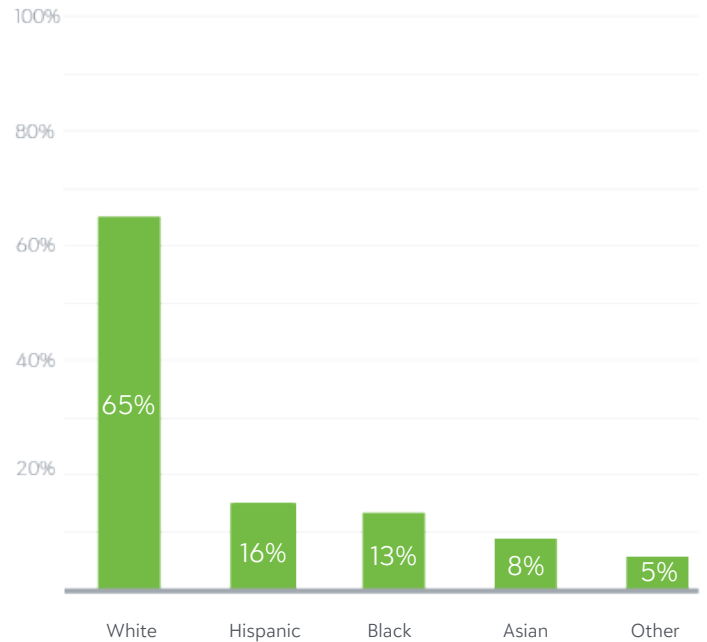## Country

Canada	21%
United States	79%

Age

18–34	15%
35–44	53%
45+	32%

Gender

Male	43%
Female	57%

School Type*

- Public: 81%
- Charter or Magnet: 9%
- Private: 10%
- Home schooled: 8%

Ethnicity*

- White: 65%
- Hispanic: 16%
- Black: 13%
- Asian: 8%
- Other: 5%

Multiple-select answer categories that return a total greater than 100%.

Income

- $100,000+ — 31%
- $50,000–99,999 — 33%
- Under $50,000 — 36%
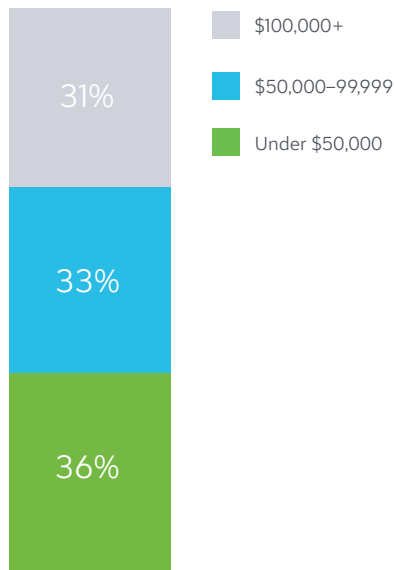
Child/Children Grade

- K–5 — 46%
- 6–8 — 27%
- 9–12 — 27%
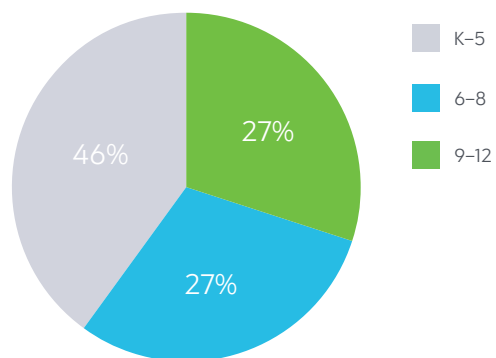
Private School Demographics

The following applies to the 699 parents who indicated that their children attended private school.

Private School Type
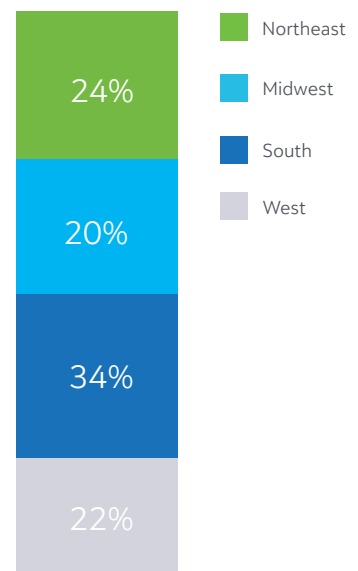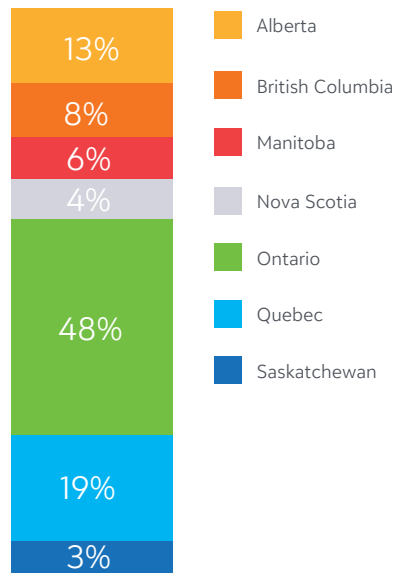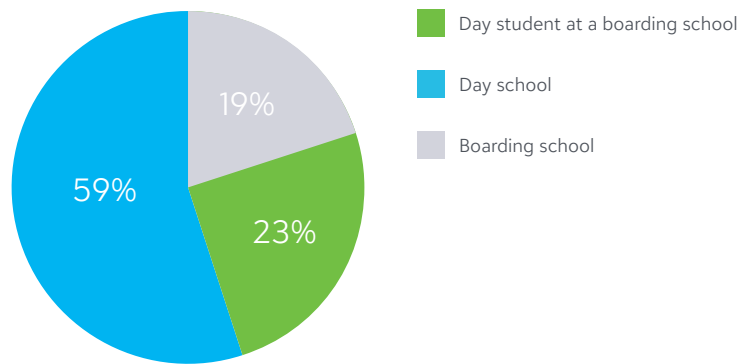

- Religious — 69%
- Non-Religious — 31%

Religious School Type

- Catholic — 48%
- Christian, non-Catholic — 40%
- Other — 6%
- Jewish — 5%

U.S. Regions

- Northeast — 24%
- Midwest — 20%
- South — 34%
- West — 22%

Canadian Provinces

- Alberta — 13%
- British Columbia — 8%
- Manitoba — 6%
- Nova Scotia — 4%
- Ontario — 48%
- Quebec — 19%
- Saskatchewan — 3%

Boarding or Day

- Day student at a boarding school — 23%
- Day school — 59%
- Boarding school — 19%

blackbaud®