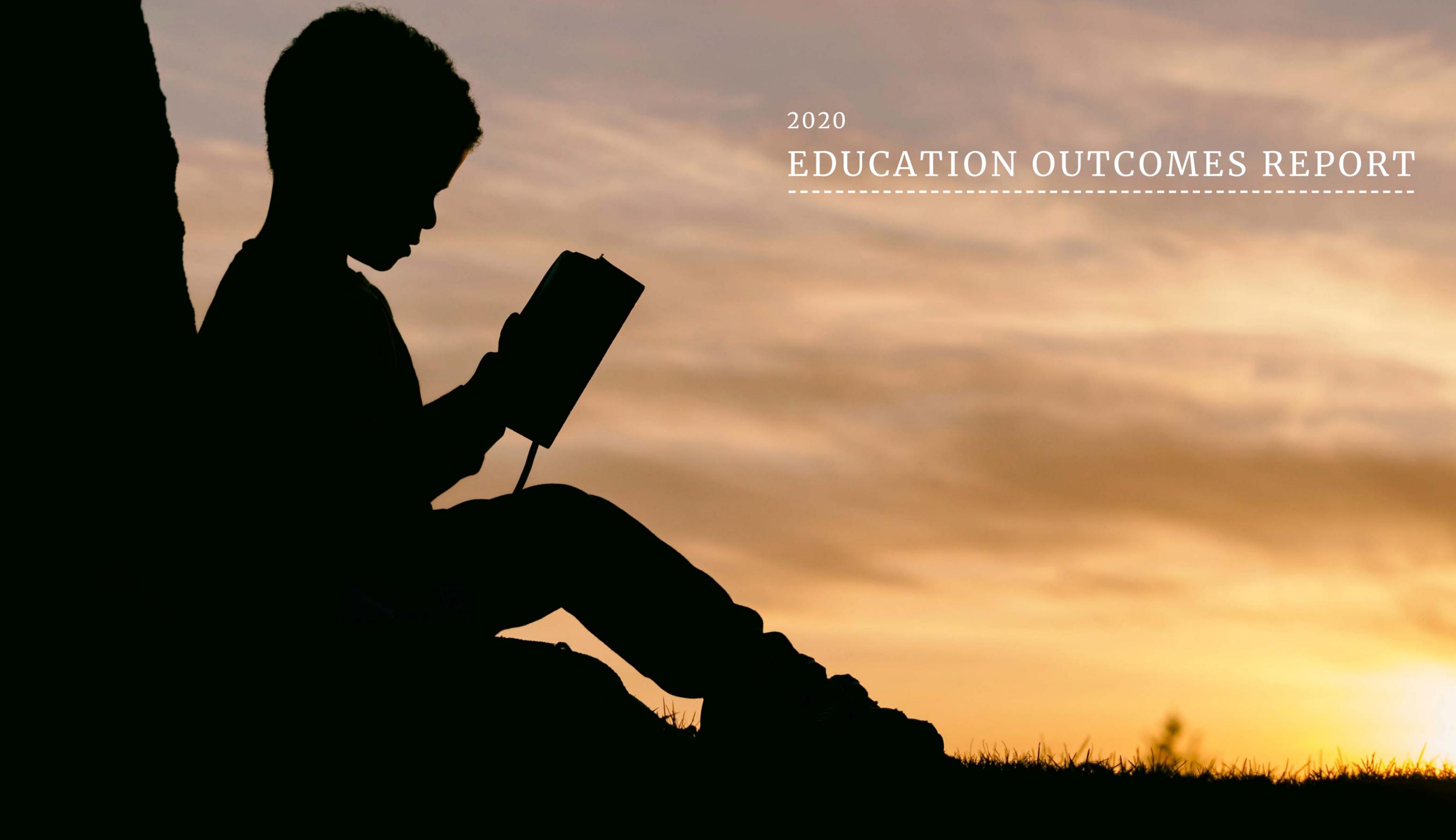


2020

EDUCATION OUTCOMES REPORT



A silhouette of a person sitting on a grassy hill, reading a book. The background is a warm, golden sunset sky with soft clouds. The person is on the left side of the frame, facing right.

2020

EDUCATION OUTCOMES REPORT



OWL VENTURES IS THE
LARGEST EDUCATION
TECHNOLOGY FOCUSED
VENTURE CAPITAL
FUND IN THE WORLD,
WITH \$1.2 BILLION
DOLLARS IN ASSETS
UNDER MANAGEMENT.



INTRODUCTION

Six years in, Owl Ventures is the largest venture capital fund in the world that focuses exclusively on education technology, with \$1.2 billion dollars in assets under management.

There is a digital revolution rapidly unfolding in the education and workforce-development sectors. The global education market is set to rise from \$6 trillion in 2020, to up to \$25 trillion in 2030. It is estimated that the next decade will see an additional 800 million K-12 graduates and 350 million post-secondary-school graduates more than today; and — with unprecedented demand for upskilling and reskilling — there is a surge in the value of education in the workforce.

With historic market challenges — of infrastructure, capital and talent — being rapidly removed, we are now in a time where there is a fundamental acknowledgment that education technology will have a profound effect on the billions of worldwide learners of all ages. Given the attractiveness of the sector, we are now seeing more talent entering the education space; a rapidly growing market for compelling international opportunities in education; and more companies at the intersection of education with other, major sectors. The COVID-19 pandemic, and the dramatic adoption of digital education during this time also mark a turning point and acceleration in the market for education technology.

All of this, together, presents a major opportunity for the next generation of large-scale education companies that will benefit from the growing share of digital spend in this market, from approximately 3%, to the more-mature industry norms of other major sectors that had adopted-technology earlier.

At Owl Ventures, we are very appreciative of the visionary entrepreneurs who have chosen to partner with us on their journeys of building transformative education companies, and who are at the forefront of this new wave of innovation in education. We are also very grateful for the support and strategic value that we have received from our global Limited Partners.

THE EDUCATION LANDSCAPE

PRE K-12

In our view, education systems, in the United States and around the world, are at a historic inflection point. As the cost of school broadband has decreased by 90%, and as access to devices is becoming ubiquitous in schools, ed-tech products are now increasingly being leveraged at scale to revolutionize the ways students learn. In the U.S., 59% of classrooms have a one-to-one, student-to-device ratio, and in China, all 250 million Chinese students will have broadband access by 2020. Digital penetration has also broken down traditional definitions of education, which has led to a new wave of companies that operate at the intersections of ed-tech and other industries: Hazel Health (ed-tech + healthcare), Swing Education (ed-tech + on-demand staffing) and Remind (ed-tech + communication). The rapid adoption of the internet, and an expanded definition of ed-tech that goes beyond curriculum products, have led to a surge of ed-tech products. Global, online learning for the K-12 education market is expected to grow at a compound annual growth rate of greater than 11.4%.

POST-SECONDARY

The online-degree market is one of the fastest-growing segments of global higher education, forecast to reach \$74 billion in 2025. Today, 15% of all higher-education, and 30% of graduate education in the United States happen fully online. Alongside traditional, online programs, the market for just-in-time skills that help students accelerate their career paths (or alleviate the burden of student debt) is highly competitive. It represents a rapidly evolving part of the post-secondary-education landscape. According to HoloniQ's research, MOOCs recently attracted almost 500 million visits from learners around the world within a span of 30 days. These numbers will only continue to grow, as developing countries, like those in Asia, Africa and Latin America, will produce nearly 700 million more people with secondary-school educations in the next decade, and as more learners, globally, opt to study online for reasons of cost, access and efficiency.

CAREER MOBILITY

From our perspective, the need for reskilling and upskilling opportunities has never been higher. The Organization for Economic Cooperation and Development estimates that nearly 1 billion jobs worldwide are likely to be transformed by technology in the next decade. The World Economic Forum predicts that, just two years from now, in major economies there will be 133 million new jobs that do not exist today. The fear of becoming obsolete in the face of automation is real, both for employers, and their workforces. On the employee side, a recent global, worker survey showed that most office workers (83%) globally would feel more secure in their jobs if their employers offered opportunities to learn new skills. For employers, as of today, the global spend by enterprises on training is approaching \$400 billion; and consumers, as well as enterprises, together spend nearly \$1.5 trillion on education or training. We believe that this spending trend will only continue to grow, as employers begin to prioritize skills over degrees, to offer education-as-a-benefit to retain employees, and to invest in reskilling their workforces to match the needs of the future.



OWL VENTURES' REFLECTIONS ON 2020

We are living in an unprecedented time. In the span of a year, the world has experienced two crises of enormous proportions. We want to share a broad update on the impact of each, on our firm, its portfolio, and the ed-tech ecosystem.

THE COVID-19 PANDEMIC: In 2020, the COVID-19 pandemic has dramatically altered the education landscape. Earlier this year, UNESCO estimated that nearly 1.3 billion learners have been impacted by school and college closures. In the United States alone, nearly 55 million students were dismissed from K-12 schools.

On top of the academic disruptions, the newly emerging, unemployment statistics are astounding. The United Nations International Labour Organization predicted 1.6 billion informal-economy workers could suffer “massive damage” to their livelihoods. In the second quarter of 2020, the COVID-19 pandemic may cost the equivalent of 305 million full-time jobs.

Our team feels privileged to work alongside a diverse portfolio of companies whose activities span pre-K, to lifelong learning, and which are located around the world. We’ve been humbled by the numerous ways companies in our portfolio have stepped up to ensure that learning did not stop for students and adult learners.

As a way to provide additional resources to the portfolio, we conducted sector- and role-specific, virtual COVID-19 pandemic roundtables as opportunities for functional leaders across our portfolio to come together to share insights on topics like remote work, employee retention, reentry plans, and hiring. We also helped companies stay on top of the latest news and resources through a weekly newsletter, and we have engaged in deep, one-to-one conversations to provide help and thought-partnership in areas like SBA loans, PPP, employee-retention strategies, and customer outreach, among others.



RACISM AND RACIAL INEQUITIES IN AMERICA: At Owl Ventures, we believe that it’s important for the workforce to be demographically and racially representative of the students in schools today, so that they will grow up seeing people like themselves in leadership positions, and will be unafraid to “dream big” at a young age. However, the reality is very different.

A 2019 report from XQ: The Super School Project showed that only half of Black and Latinx children have mastered even basic reading skills by the fourth grade, and only one-sixth of Black, and one quarter of Latinx ninth-graders will graduate college-ready from high school. A different report highlighted that Black children are 3.6 times more likely to receive out-of-school suspensions than White children are; and that Black children are more than twice as likely to face school-related arrests, and to be referred to law enforcement. These lived experiences eventually result in Black and Latinx young adults being unemployed at higher rates than their White and Asian peers.

This year, the COVID-19 pandemic has only widened the gap. The economic downturn had a disproportionate impact on persons of color, with 24% of Latinx, and 23% of Black Americans reporting that they had been laid off, compared to 15% of White Americans.

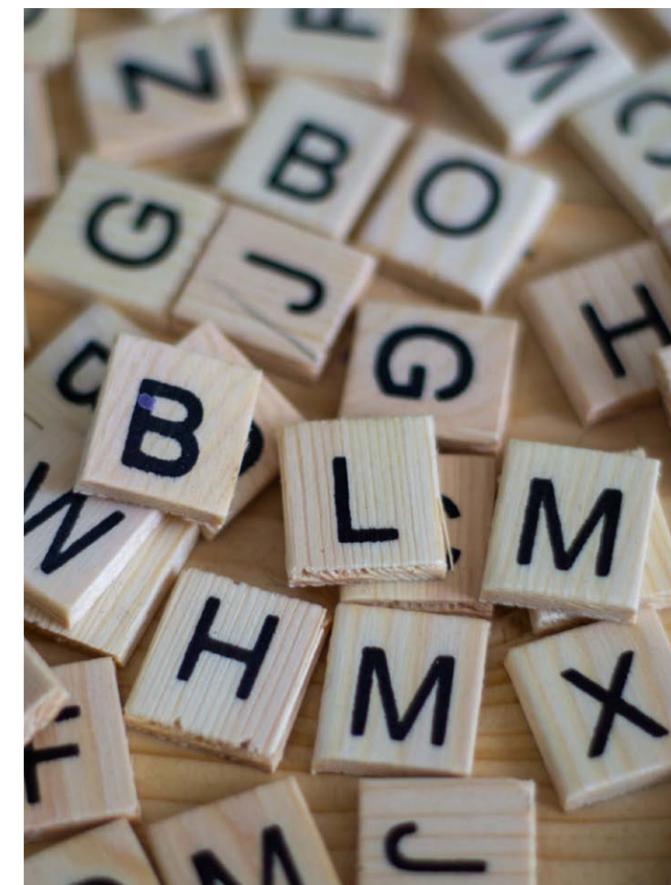
The cumulative impact of systemic racism and racial inequalities — against the backdrop of the deaths of George Floyd and other Black Americans — left us feeling both shaken, and outraged. It also served as a much-needed reminder to accelerate the work to be done to improve opportunities for underrepresented minorities in the tech and venture capital communities. As a way to do our part, we, together with our portfolio, are taking a few, small steps forward:

- Publishing the diversity data for our team and our portfolio on an annual basis.
- Playing a bigger role in helping our companies find diverse candidates at the board and C-suite levels of the organization.

- Continuing to find diverse candidates for Owl Ventures as we add new team members.

- Supporting portfolio needs with inclusive, best practices across hiring, recruiting, training and compensation.

We acknowledge, though, that we’re early in our journey. We are excited to partner with our Limited Partners to continue to build upon this important work.



EMERGING TRENDS IN 2020 AND ITS IMPACT ON THE ED-TECH ECOSYSTEM

The impact of the crises on ed-tech is far-reaching, and the importance for high-quality, scaled education technology has never been greater.

TREND ONE. **INCREASED DEMAND FOR ED-TECH:**

Due to the COVID-19 pandemic, ed-tech startups across the early-education-to-lifelong-learning spectrum have experienced explosive demand from existing and new customers. As the United States, Europe and Asia cancel in-person classes, traditional classrooms are rushing to implement comprehensive, remote-learning solutions. In U.S. K-12 schools, after pandemic-related school closures, there was a 90% average increase in tools accessed each month, when compared with the previous, monthly average for the 2018-2019 academic year. In a recent Inside Higher Ed survey of 187 university presidents, 98% of respondents had moved a majority of classes online. Increasing unemployment rates have put renewed pressure on employers and individuals to focus on reskilling and upskilling.

At Owl, we are finding that our portfolio companies are mission-critical elements of continued learning. Inbound inquiries, user growth or engagement, and customer pipelines have all spiked dramatically across the portfolio. For instance, Labster formed a partnership with California Community Colleges to make virtual science labs available to 2.1 million students during the pandemic, Degreed is seeing Fortune 100 customers accelerate their procurement processes, and BYJU'S has experienced a 150% increase in learners, with 6 million new students learning in March, 2020, alone.

TREND TWO. **THE NEED TO BE NIMBLE:**

The COVID-19 pandemic marks a profound turning point in the market, as educational institutions from here on out will need to be prepared and ready to deploy technology at scale as they continue to leverage distance- and hybrid-learning models to support all their students. For those in

the workforce, the current reality of working remotely has increased the need for online solutions that can support remote hiring, training and learning best practices. Since ed-tech digital solutions are not burdened by the historical challenges of physical distribution, inventory, and long sales cycles, they are better positioned to cut through procurement red tape and to deliver much-needed assistance to the market as quickly as possible.

We've already seen an overwhelming majority of ed-tech startups stepping in with offers to serve new customers. One of our portfolio companies, Panorama Education, developed a new, distance-learning survey to help New York's DOE to gather feedback from students and families, so that schools could continue to make adjustments to best serve their communities during school closures. Companies like Swing Education and Tinkergarten, have all developed business-to-consumer offerings to support their learners in the home environment. SV Academy has partnered with the Kapor Foundation to continue providing high quality, diverse SDR candidates to 300-plus companies during the pandemic.

TREND THREE. **SOLVING FOR THE AT-HOME DIGITAL DIVIDE:**

Among the many inequalities exposed by the COVID-19 pandemic, the digital divide is not only one of the most stark, but also, among the most surprising. According to UNESCO, only 55% of households globally have internet, and that number drops to 19% in the least-developed countries. A recent, Pew Research Center study estimated that, in the United States, roughly one-third (35%) of households with children ages 6 to 17 and annual incomes below \$30,000 a year do not have high-speed internet connections at home. It is clear that there is a digital divide globally and that the divide disproportionately affects learners from low-income families and persons of color — which further increases the achievement gap.

Several institutions, and local and national governments are rallying together globally to address this problem. In

the United States, the coronavirus relief bill allows school districts to use a percentage of its \$345 billion fund toward purchases of devices for students; tech companies like Google, Amazon, Microsoft have also donated 100,000-plus devices. The rise in access to smartphones in India over the past few years has grown by a factor of five times; the government has launched apps with all relevant study materials so students can continue learning. In cases where families do not have mobile phones, the government has launched dedicated TV channels and radio broadcasts to disseminate instructional materials to students.

Companies like Lele Ketang, in China, and Hazel Health, in the United States, are explicitly focused on underserved student populations, with goals of providing them with best-in-class learning, and health care support, respectively. In India, BYJU'S and WhiteHat Jr serve millions of students with low cost, mobile- and desktop-based products. Some companies, like Newsela, offer content in "offline mode" to support continuous learning.

TREND FOUR. **ADDRESSING THE MENTAL-HEALTH CRISIS:**

Remarking the new realities of the pandemic — working from home, temporary unemployment, home-schooling of children, and lack of physical contact — experts warn that a historic wave of mental-health problems is here. In a recent Kaiser Family Foundation poll, nearly half (45%) of adults in the United States reported that their mental health has been negatively impacted due to worry and stress over the virus. A Center for Promise survey indicated that more than one in four young persons reported an increase in losing sleep, because of worry, feeling unhappy or depressed, feeling constantly under strain, or experiencing a loss of confidence in themselves. It goes without saying that this data is both sobering, and worrying.

At a time like this, we feel particularly proud of our partnership with companies, like Securly and Panorama Education, that are at the forefront of addressing mental and socio-emotional challenges that students are facing today.

LOOKING AHEAD

Looking ahead, we are thrilled about the powerful and continuously growing network that we have amassed through our active partnerships with more than 30 ed-tech companies, and our strategic, global Limited Partners. We are particularly proud of the incredible impact that our companies are having on education outcomes for learners of all ages and backgrounds.

Snapshots of this impact are highlighted in this report, but it is most directly felt by the hundreds of millions of individuals and their families whose lives are being transformed by education. We feel fortunate to be doing this work every day, and we appreciate the support we have from our team, our limited partners, our portfolio companies, and the Owl community.



OWL'S APPROACH TO OUTCOMES MEASUREMENT

At Owl, we recognize that prioritizing impact is a fundamental requirement for building long-lasting businesses. We work with portfolio companies to measure impact in three primary areas: reach and access, diversity, and outcomes.

REACH AND ACCESS

In order to achieve greater equity and inclusion in education there needs to be increased efforts to collect and analyze data on the most-excluded segments of the population. Owl works with companies to understand their customer profiles and to ensure that the products they are building have the ability to scale without locking out high-need communities. Within the U.S. context, metrics to measure access differ by company sector, business model, and key stakeholders.

Pre-K-12: For example, a K-12 company that sells directly to schools and districts can report on the percentage of students who qualify for Free and Reduced Lunch (FRL: A proxy for poverty, based on family income) in customer districts, English Language Learners (ELLs) served, as well as demographic data of students by race. However, an early learning company that sells directly to customers may not be able to leverage FRL or ELL data to measure access. Instead, it might track access through the number of parents and communities served by geography, product price point, and types of devices its product is available on.

Postsecondary and career mobility: A 2019 McKinsey & Company study reported that labor-market outcomes vary across demographic groups, and that Latinx and African American workers are four times more likely to hold “automatable” jobs. The same study also highlighted the nearly 11.5 million workers over 50 years

of age who hold at-risk jobs. To allow education to serve as an equalizer, we encourage companies to collect data on measures like gender, income level, level of education, cities their customers are from, and racial profiles for their customers, where possible.

International: Internationally, alongside factors like household income and geography, access gaps are also attributed to cultural norms, religion, and caste or class systems. For example, in India, according to the latest census, there is a wide gap between rates of female literacy (65%) and male literacy (82%), which further widens in the rural parts of the country (59%). In China, the spending capacity of families for their children’s education in cities is double that of families in rural communities. Where possible, our companies track comparison data on urban and rural populations served, including income levels of users, gender, and age ranges.

DIVERSITY

The benefits of diversity are well-documented. Prioritizing diverse leadership and concrete HR policies are also crucial for employee retention, better decision making and strong work cultures.

McKinsey & Company’s latest research finds that companies in the top quartile for gender or racial and ethnic diversity are 35% more likely to have financial returns above national industry medians. In another study, researchers found that, when diverse teams of three or more people made a business decision, they outperformed individual decision-makers up to 87% of the time. Diverse teams were also shown to make decisions faster than individual workers, and they, too, benefited from a 60% improvement in decision-making.

At Owl, we recognize that lack of diversity in teams is a problem, since homogenous communities are susceptible to groupthink and are less likely to voice the needs of the communities they hope to serve.

As a part of our annual diversity survey, we collect metrics like gender, race, pay equity, and employee retention for women, and persons of color for each of our portfolio companies, where applicable.

OUTCOMES

Owl recognizes that each portfolio company addresses a unique challenge within the education market. As a result (similar to the way we think about access), we help each portfolio company identify and measure specific outcomes that are in line with its product goals.

Pre-K-12: As an example, a pre-K-12 content company will measure its impact using outcomes, like student achievement on standardized tests, or socio-emotional skills developed; whereas other, pre-K-12 companies might track metrics, like chronic absenteeism and teacher time saved.

Postsecondary and career mobility: A career-mobility company, on the other hand, will measure its impact using outcome metrics, like graduation rates, scholarships received, job-placement numbers and salaries earned. These metrics are similar to those used by the career-mobility sector, focused on reskilling and upskilling.

We know that different types of research are appropriate to determine effectiveness according to product type and development stage. Therefore, we encourage our portfolio companies to report their impact along a spectrum, from formative research, to summative research. Using a spectrum, early-stage companies might showcase their impact through user testimonials and descriptive, case studies; whereas, a more-mature company will be able to provide rigorous, research data, by virtue of participation in causal, comparative, or randomized controlled trial studies. At the core, we want to help companies answer one, fundamental question: Does your product have a positive outcome for its intended users?

Owl classifies companies in three primary-education-focused industries: pre-K-12; postsecondary education; and career mobility. The report is organized by these industries. For each company, you will find a description of the company; the company’s approach to measuring effectiveness; and its access and outcomes data, told via metrics and case studies.

OWL VENTURES TEAM



JOHN AZUBUIKE



KRITI BANSAL



EMILY BENETT



MALVIKA BHAGWAT



KATE CHHABRA



IAN CHIU



TOM COSTIN



ROSS DARWIN



BRITTANY HELM



CARMELL LAZAR



TERESA LEW



REGINA LOMBARDO



JUDY PARK



AMIT PATEL



TORY PATTERSON



JENNY WANG

TEAM OF ENTREPRENEURS, INVESTORS, AND SECTOR EXPERTS

SEQUOIA

SILVERLAKE

TA ASSOCIATES

WARBURG PINCUS

BainCapital

CA CAMBRIDGE ASSOCIATES

CATAMOUNT VENTURES

TCV

BAIN & COMPANY

BARCLAYS

EY PARTHENON

McKinsey & Company

Emerson Collective

SOROS
Soros Fund Management

THE ASPEN INSTITUTE

The New York Times



newsela

MATHNASIUM
The Math Learning Center

Spotify



HARVARD UNIVERSITY

STANFORD BUSINESS
GRADUATE SCHOOL OF

Stanford
GRADUATE SCHOOL OF EDUCATION



PORTFOLIO AT A GLANCE



REACH

222+

COUNTRIES

240m+

USERS

7800+

EMPLOYERS

8300+

HIGHER-ED
INSTITUTIONS



ACCESS ACROSS THE PORTFOLIO

40%

ELL STUDENTS

57%

STUDENTS OF COLOR

FREE OR REDUCED LUNCH STUDENTS
SERVED IN U.S. K-12



ENGLISH LANGUAGE LEARNERS
SERVED IN U.S. K-12



TITLE 1 SCHOOLS
SERVED IN U.S. K-12



STUDENTS OF COLOR
SERVED IN U.S. K-12



34

TOTAL
INVESTMENTS

\$1.2b

ASSETS UNDER
MANAGEMENT

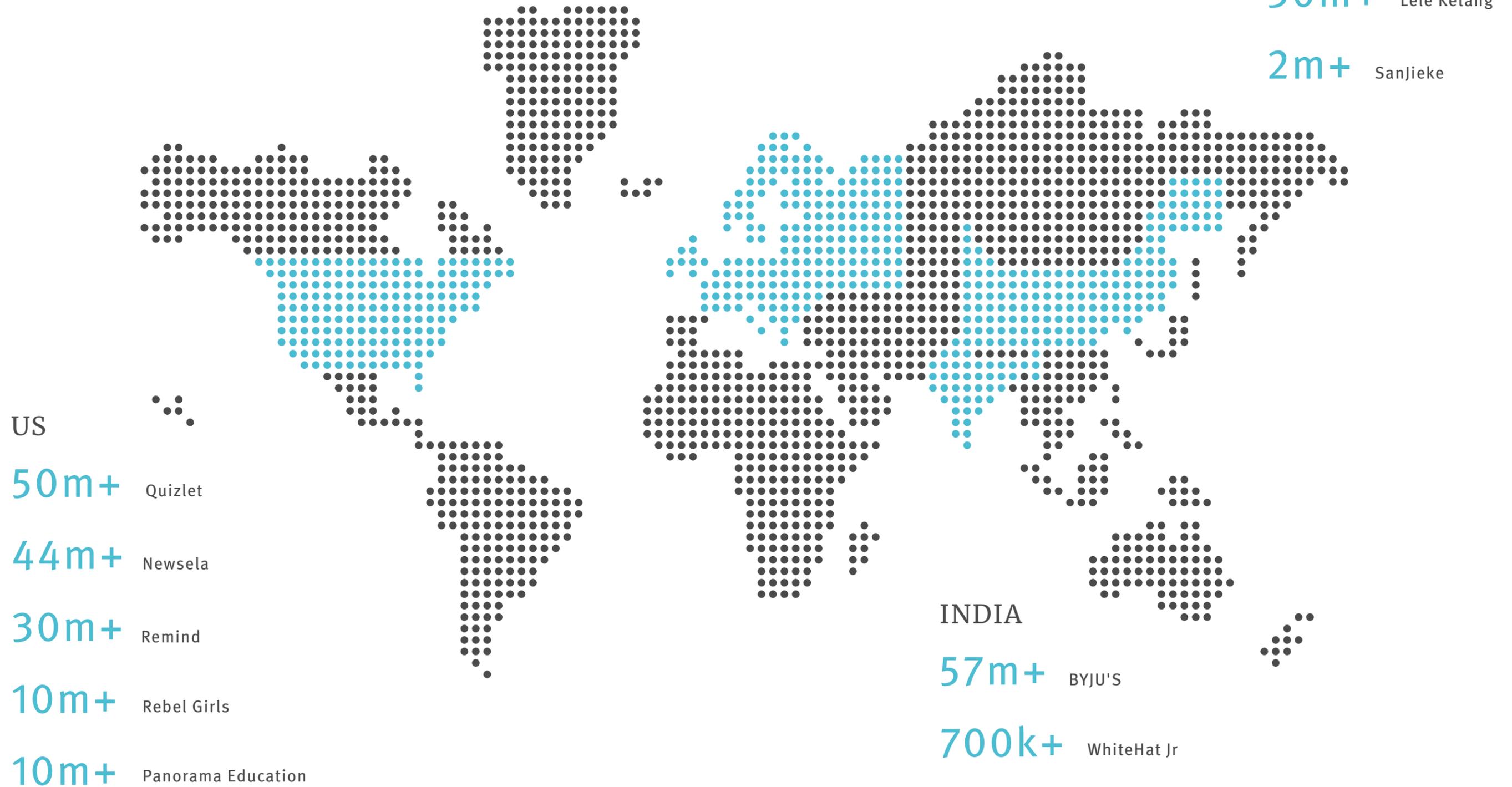
14k+

TOTAL JOBS
CREATED

PORTFOLIO AT A GLANCE



USERS REACHED GLOBALLY BY OWL PORTFOLIO COMPANIES



PORTFOLIO AT A GLANCE



RESEARCH AND EFFICACY RIGOR

86.7%

1:1 or group user testing to get feedback on product feature usability and product implementation processes.

USABILITY OR
FEASIBILITY STUDIES

66.7%

Conducting studies that measure change in outcomes by comparing data before and after the intervention was implemented.

PRE/ POST DATA
ANALYSIS

46.7%

Examines relationships between two variables by comparing how changes in one variable correlates with another.

CORRELATIONAL

33.3%

Compare outcomes of the group that receives the intervention with outcomes of a group that did not receive the intervention. The sample selection is not randomized.

QUASI-EXPERIMENTAL
STUDIES

9.9%

Participants are randomly assigned to a control and intervention group before the intervention is administered. Then the outcomes of the two groups are compared, to measure the effects of an intervention.

RANDOMIZED
CONTROL TRIALS



RESEARCH & EFFICACY PRIORITIES

90%

Companies that have engaged subject matter experts to get product feedback.

76.7%

Companies that have a research basis for their product.

46.7%

Companies that have developed an iterative logic model.

46.7%

Companies that have worked with external research organizations to conduct research studies.

26.7%

Companies that have a full-time staff member dedicated to outcomes and efficacy.

20%

Companies that have applied for federal funding and other grants to accelerate their efficacy work.

KEY COMPANY OUTCOMES

 **abl.** **70%**

Of the population that Abl serves, 70% identify as students of color, and 60% qualify for free and reduced lunch.

 **BenchPrep** **40%**

Learners using BenchPrep saw 40% higher pass rates on HRCI exams than national average.

 **dreambox** **1.9**

In 2019-2020 school year, students grew an average of 1.9 grade levels when they used DreamBox as recommended.

 **kuali** **200k+**

More than 200,000 paper forms have been eliminated since the start of 2020, with the use of Kuali products.

 **Accelerate Learning** **8k**

In Texas, an additional 8,000 students demonstrated mastery on standardized tests because of STEMscopes.

 **BetterLesson** **95%**

95% of participants implemented a new resource or strategy in the days following their workshop.

 **hazel** **15k**

In the 2019-2020 school year alone, Hazel Health offered students 15,000 more instructional hours.

 **Labster** **12m+**

12m+ learning outcomes delivered in 2019-2020.

 **AMIRA LEARNING** **5.6k**

During the school year 2019-2020, students have read over 5,600 hours of scaffolded reading with Amira Learning.

 **BYJU'S** **13.5m**

13.5 million new students joined BYJU's to continue their education during school closures.

 **Imbellus** **90%**

90% of applicants find Imbellus assessments, engaging, or very engaging.

 **乐乐课堂** **95%**

95% of students from Lele partnership tutoring schools saw score improvement in their exams.

 **Bakpax** **21k**

21,000 users served within the first five months of launch.

 **degreed** **480%**

A year-over-year, 480% increase in the percentage of active users with skill ratings in Degreed.

 **KIDDOM** **70%**

70% increase in assignments shared on Kiddom year over year.

 **lingo live** **93%**

93% of Lingo Live's learners' managers have noticed improvement due to the program.



59%

59% said they learned something that changed their approach to work or hobby.



14b+

14 billion study terms have been created on Quizlet by students from over 130 countries.



1038

Lives saved (the number of incidents Securly believes, that, without intervention, would have led to a suicide attempt).



61.8%

Enrolled parents report that children play more independently.



135%

A 135% increase in the number of Newsela quizzes taken by students in Title I schools during school closures in 2020.



98%

98% of students at a New Zealand university downloaded RaftR, with 75% completing 25 user actions per month.



2m+

SanJieKe serves over 2 million users.



1m+

Over a million projects have been created by kids on WhiteHat Jr.



\$30k

Noodle Partners saves schools \$15,000 to \$30,000 per student.



10m

10 million girls reached to date, across 85 countries, in 49 different languages.



\$40m+

Total value of offers generated: \$40+ million.



75%

Students who report high self-management are 75% less likely to face failing grades.



400m

Approximately 400 million messages are delivered every week between teachers, students, and parents.



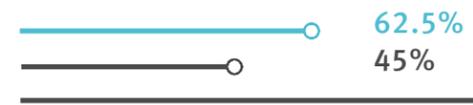
250k+

Swing Education has placed teachers in 250,000-plus classrooms.

DIVERSITY METRICS AT A GLANCE

OWL VENTURES DATA

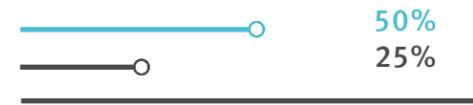
62.5% WOMEN
62.5% PEOPLE OF COLOR
40% WOMEN OF COLOR
40% NON U.S. BORN INDIVIDUALS



WOMEN



PEOPLE OF COLOR



WOMEN ON THE INVESTMENT TEAM



PEOPLE OF COLOR ON THE INVESTMENT TEAM



WOMEN AT INVESTMENT PARTNER OR EQUIVALENT



PEOPLE OF COLOR AT INVESTMENT PARTNER OR EQUIVALENT

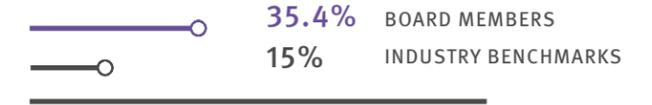
■ OWL TEAM ■ INDUSTRY BENCHMARKS

BOARD OF DIRECTORS DATA

15.6% WOMEN
35.4% PEOPLE OF COLOR
3.5% WOMEN OF COLOR



WOMEN



PEOPLE OF COLOR



55.6%

COMPANIES HAVE AT LEAST ONE WOMAN ON THEIR BOARD OF DIRECTORS



66.7%

COMPANIES HAVE AT LEAST ONE PERSON OF COLOR ON THEIR BOARD OF DIRECTORS



11.1%

COMPANIES HAVE AT LEAST ONE WOMAN OF COLOR ON THEIR BOARD OF DIRECTORS

FOUNDERS AND CEO DATA

17.4%

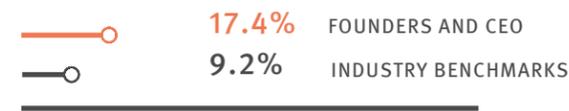
WOMEN

41.2%

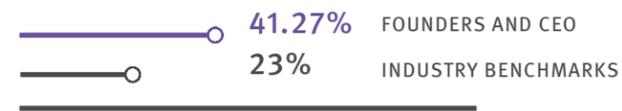
PEOPLE OF COLOR

7.6%

WOMEN OF COLOR



WOMEN



PEOPLE OF COLOR



33.3%

COMPANIES HAVE AT LEAST ONE FEMALE FOUNDER AND/OR CEO



42.3%

COMPANIES HAVE AT LEAST ONE PERSON OF COLOR AS THEIR FOUNDER AND/ OR CEO



16.7%

COMPANIES HAVE AT LEAST ONE WOMAN OF COLOR AS FOUNDER AND/ OR CEO

33.3%

NON U.S. BORN INDIVIDUALS

25.4%

FIRST GENERATION COLLEGE STUDENTS

SENIOR LEADERSHIP DATA

35.1%

WOMEN

34%

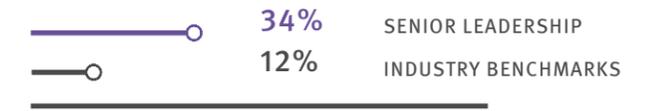
PEOPLE OF COLOR

11.6%

WOMEN OF COLOR



WOMEN



PEOPLE OF COLOR



96.4%

COMPANIES HAVE AT LEAST ONE FEMALE IN THEIR LEADERSHIP TEAM



71.4%

COMPANIES HAVE AT LEAST ONE PERSON OF COLOR IN THEIR LEADERSHIP TEAM



57.4%

COMPANIES HAVE AT LEAST ONE FEMALE OF COLOR IN THEIR LEADERSHIP TEAM

23.9%

NON U.S. BORN INDIVIDUALS

24.7%

FIRST GENERATION COLLEGE STUDENTS

CONTENTS

1

PRE- K-12

Abl
Accelerate Learning
Amira Learning
BakPax
BetterLesson
BYJU'S
DreamBox Learning
Hazel Health
Kiddom
Lele Ketang
Newsela
Panorama Education
Quizlet
Rebel Girls
Remind
Securly
Swing Education
Tinkergarten
WhiteHat Jr

2

POST- SECONDARY

BenchPrep
Kuali
Labster
Noodle Partners
Raft

3

CAREER MOBILITY

Degreed
Lingo Live
MasterClass
Sanjiek
SV Academy

PRE-K-12

Abl

Accelerate Learning

Amira Learning

BakPax

BetterLesson

BYJU'S

DreamBox Learning

Hazel Health

Kiddom

Lele Ketang

Newsela

Panorama Education

Quizlet

Rebel Girls

Remind

Securly

Swing Education

Tinkergarten

WhiteHat Jr





CEO

Howard Bell

FOUNDED

2015

NOTABLE CO-INVESTORS

Sinovation Ventures, Reach Capital, Rethink Education, First Round Capital

WEBSITE

www.ablschools.com

HEADQUARTERS

San Francisco, California

FOCUS

School administration and operations

COMPANY

Abl works with district and school leaders to set operations baselines, develop improvement plans, and create new structural designs and systems that eliminate historic barriers. By doing so, Abl creates optimal, structural environments to ensure systemic and sustainable change in students' paths to, and attainment of, a viable choice.

CUSTOMER TESTIMONIAL

"It has truly been a pleasure working with you and the whole team. I just cannot thank you enough for everything that you have done over the past few weeks to ensure that we were in the best possible place with EVERY school's schedule."

– Keller ISD

BUSINESS MODEL

Abl works with states and school districts to generate insights that enable leaders to optimize resource allocation to improve equity, and to avoid unintended consequences of scheduling decisions. Abl products include a data-analysis product, "Abl Evaluate," a consultative offering to help schools construct a way forward, and a product, "Abl Build," that helps schools create master schedules, along with services that include professional development for school and district leaders.



ADAM PISONI

Founder

Adam Pisoni is the founder of Abl, and served as its CEO until 2020. Prior to founding Abl, he co-founded and served as CTO of Yammer. Microsoft purchased Yammer for \$1.2 billion in 2012.



HOWARD BELL

CEO

An electrical engineer and attorney, Bell is a graduate of Brown University and the University of Virginia Law school, with an MBA from the University of Michigan’s Ross School of Business. Prior to joining Abl, Bell held multiple leadership roles in the education-technology sector, including his most recent role as general manager and senior vice president at Hobsons. Previously, he had served as an administrator and educator at Wayne State University, and as president of TechTown in Detroit.

PAIN

District and school leaders want to graduate all students from K-12 to be “College and Career Ready,” however, they don’t understand how to lead through the master scheduling process to address the needs of both students and teachers, while meeting enrollment, staffing, and budget constraints.

SOLUTION

Abl leverages data (quantitative and qualitative) and best practices to help districts chart and execute an equitable plan to improve student and school performance — focusing on the structural elements of scheduling design (resources, times, courses, students, schedules) and systems to ensure that each student has access to, and a path towards, a viable choice. Abl offers a cloud-based platform that provides school leaders with the tools they need to test and evaluate scheduling scenarios.

PRIMARY PRODUCT STAKEHOLDERS

District leaders, school leaders, schedulers, teachers, parents, students

RECOMMENDED PRODUCT USAGE

Abl’s primary users across our suite of products include district leaders, school leaders and schedulers. It is critical that district leaders evaluate and understand insights about the student experience. School leaders then need to interpret data about their sites, and create an action plan for how to address access to rigor, and their graduate profiles. Schedulers need to understand the intended outcomes for their site and have the tools available to build master schedules that meet those intended outcomes.

“Abl is poised to provide operational excellence to K-12 through equity. Growing up in a poor, urban school district, and my decades of work in higher-education and ed-tech companies have made it clear to me that too many students don’t make choices based on their hopes for the future, but instead, from a sense of desperation, or as a last resort. Abl uses its expertise to engage leaders in a continuous-improvement cycle to eliminate the systemic structures that limit students from viable choices for their futures.”

– Howard Bell, CEO



ABL BY THE NUMBERS

AVERAGE WEEKLY USAGE

13k+

The average number of activities completed in a week for Master Scheduler.

REACH

2.3m+

Students

150

Schools

70+

School districts

16

States

ACCESS

60%

Free-reduced lunch students

24%

English-language learners

70%

Students of color

41%

Latinx

30%

White

10%

Black

7%

Asian

1%

American Indian or Alaska Native

1%

Native Hawaiian or other Pacific Islander

PRODUCT OUTCOMES

OUTCOME 1: ALL STUDENTS HAVE THE CURRICULUM AND SUPPORT THEY NEED TO BE COLLEGE-READY

DESCRIPTION: Access to rigorous coursework, persistence in courses, and student supports vary among student groups, and between different school sites. Abl uses multidimensional analysis to predict college-and-career readiness based on transcripts and test scores, to understand the graduate profile overall, and by student group.

Based on available student transcripts, **59%** of students are not achieving the level of course intensity necessary to be college-and-career ready.

OUTCOME 2: RETAIN AND SUPPORT EDUCATORS WITH SUFFICIENT TIME TO SUPPORT STUDENTS

DESCRIPTION: A review of teacher-to-student loads, and course loads per teacher reveals significant differences between teachers and school sites.

The median, student load per teacher across secondary schools in our data set is **131** students per teacher. The average course load for teachers in a standard five-to-eight-period bell schedule is three courses.

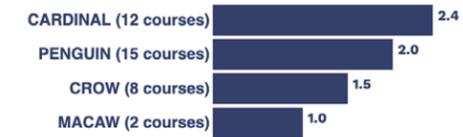
Race/Ethnicity Gender EL IEP FRL

Teaching

Teacher Load, all student segments

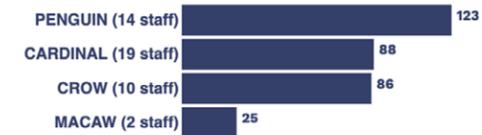
Average Number of Courses: MATH*

* teachers who teach any courses in the MATH department(s)



Average Number of Unique Students: MATH*

* teachers who teach any courses in the MATH department(s)



Race/Ethnicity Gender EL IEP FRL

Teaching

Each Teachers' Student Makeup for Courses in MATH



1 IMPROVING COLLEGE AND CAREER READINESS FOR ALL STUDENTS FEDERAL WAY PUBLIC SCHOOLS

ABOUT THE DISTRICT

Federal Way Public Schools (“Federal Way”)

- 49 schools
- 23,318 students
- 87% graduated in four years
- 23% English-language learners
- 66% low-income students

Federal Way is focused on an advancement of a college-going culture and on expanding STEM access to all students. An analysis of transcript and scheduling data helped them identify ways to improve college-and-career readiness for all students in the district.

CHALLENGE

- FWPS implemented a brand-new high school schedule in 2014. At the time, every school in the district had its own set of graduation requirements, without an agreed-upon set of common metrics for College and Career Readiness.”
- FWPS sought to align improvement and accountability measures across the district, and to understand the impact of master scheduling practices on student access to rigorous coursework, instructional time, and resource efficiencies.
- FWPS engaged the team at School by Design (now, Abl) to conduct a District Scheduling Audit, focused on College and Career Readiness metrics, instructional time, student enrollment, and equity in the district.

THE APPROACH

Abl conducted an analysis of data, on annual instructional time, student performance, and schedule efficiency (e.g., the number of courses taught by each educator) to examine and better understand:

1. College and Career Readiness
Are student schedules structured to ensure academic preparedness?
2. Use of Time, and Student Course Enrollment
How many hours of instructional time are students participating in per-course credit?

How many students are enrolled in partial (versus full) academic schedules, and how is this impacting resource allocations through the state funding formula?
3. Equity
Do levels of academic rigor for students’ coursework differ, on average, between subgroups (e.g., by gender or ethnicity)?

“With the launch of our strategic plan, we were seeing gains in graduation rates and overall college readiness in our high schools. However, we knew we still had work to do to reach our goals. Abl’s analysis helped us see that many scholars were not having the rigorous, robust schedules and academic experiences that they needed to open every possible door after high school. Not only that, but our scheduling practices were also resulting in a financial hit to our district.”

– Tammy Campbell, Superintendent, Federal Way Public Schools

THE FINDINGS AND IMPACT: ABL’S DATA ANALYSIS IDENTIFIED TRENDS THAT HELP FEDERAL WAY LEADERSHIP PURSUE THE FOLLOWING GOALS:

GOALS	FINDINGS	IMPACT
Boosting College and Career Readiness Metrics and Increasing Equity	A College and Career Readiness audit identified significant discrepancies in student course-taking patterns between schools and student subgroups. On average, the course schedules of White and Asian students had a higher Academic Intensity Measure than the course schedules of African American and Latinx students.	Federal Way is implementing a variety of College and Career Readiness initiatives, including intentional improvements in student schedules to maximize rigorous coursework. The district is measuring impact using a variety of metrics, including data on student enrollment in two- and four-year programs directly after high school graduation, as well as persistence in those programs; senior-exit surveys and student-perception data; and college-bound scholarship data.
Increasing Instructional Time per Course	An audit of the district base schedule focused on instruction time found that per course, students in Federal Way were with an instructor 43 hours less (approximately eight weeks less of instructional time) per course credit than school districts on a six-period day.	Federal Way launched a task force to study the findings from this audit and to provide tailored and strategic recommendations for adjustments that improve the students’ learning time.
Improving Student Enrollment and Maximizing Resources	By their third and fourth years, many students who had completed the required number of courses were enrolling in partial schedules: Starting the day late, leaving early, or engaging in non-course activities (e.g., teaching-assistant positions). In addition to limiting time for college-and-career-preparatory activities, this practice also decreased the amount of state funding allocated to the district.	Federal Way instituted a new policy to prevent students from being assigned to non course activities or having open periods in their schedules. The percent of students with open periods in their schedule decreased. This has elevated students’ ability to access different courses that will set them up for success after graduation, while simultaneously improving state funding.



CEO	Vernon Johnson
FOUNDED	2013
NOTABLE CO-INVESTORS	Rice University Management Corp, The Carlyle Group, and Quad Partners
WEBSITE	www.stemscopes.com
HEADQUARTERS	Houston, Texas
FOCUS	STEM (Science, Technology, Engineering, & Math)

COMPANY

STEMscopes, created by Accelerate Learning Inc., is an award-winning, research-based national leader in pre-K-12 STEM curricula. Used by nearly 6 million students and 571,000 teachers across all 50 states and internationally, STEMscopes provides comprehensive science, technology, engineering and math (STEM) digital resources, supplemental print materials, and hands-on exploration kits that drive engagement and academic growth.

BUSINESS MODEL

Accelerate Learning offers subscriptions to its core curriculum, STEMscopes, to school districts and schools. STEMscopes is a high-quality curriculum in science, math, engineering and technology (coding), tailored to state and national standards at a fraction of the cost of those offered by traditional publishers. Accelerate Learning offers extensive teacher training through its National Institute for STEM Education, including online courses and certifications, a STEM Teaching National Certificate, a National Certificate for STEM Excellence, and in-person or virtual growth sessions.

CUSTOMER TESTIMONIAL

“STEMscopes is great. Until we began using STEMscopes, students didn’t understand that science is everywhere. In kindergarten through fourth grade, they thought “science” was a book. They didn’t see science as being connected to the real world, so they thought that, when they left school, they’d never use it again. Now they realize science is everyday life.”

— Karen Silensky, fifth-grade teacher, in Sunrise, Florida.



VERNON JOHNSON, ED.D

President and CEO

Vernon Johnson came to Accelerate Learning with a mission to provide teachers with effective and affordable STEM programs that will transform classrooms and improve student performance. Vernon served for 25-plus years in public education before launching into business, developing and providing effective learning programs. As CEO of Voyager and Epic Learning, and EVP of American College of Education, he built scalable, effective, and affordable programs which serve millions of students.



REID WHITAKER, Ph.D.

Founder and Chief Academic Officer

Reid Whitaker is the creator of STEMscopes. He was named one of the nation’s leading “Edupreneurs” by EdTech Digest. He taught with Teach for America as an elementary-science-lab teacher. Reid served as a content specialist and award-winning principal in Houston, and as an associate director at Rice University’s Center for Education. Reid created STEMscopes and joined Accelerate Learning to solve through education the nation’s STEM crisis.

PAIN

A major pain point in the market today is that teachers lack access to high-quality, inquiry-based, standards-aligned STEM curricula. This pain point was accentuated by the shift to distance learning in response to the COVID-19 pandemic, when schools and teachers had to shift their schooling model. This shift left many educators scrambling to find a rigorous, high-quality, standards-aligned STEM curriculum that includes inquiry-based learning, and is actively being adjusted for a distance-learning model. Likewise, teachers lack access to embedded professional development to support the effective implementation of STEM curricula, in the classroom or during distance learning. Effective implementation is a key component of students’ academic success.

SOLUTION

As a solution to teachers’ lack of access to high-quality STEM curricula, Accelerate Learning provides an online, comprehensive, and hands-on science, math, engineering and technology (coding) curriculum across pre-K-12. The curriculum puts teacher support at its center, including supports created this year, specifically for distance learning.

PRIMARY PRODUCT STAKEHOLDERS

District leadership, science teachers and students pre-K-12.

RECOMMENDED PRODUCT USAGE

The product is built around the BSCS 5E instructional model. This model is an effective way to engage students and consists of five phases: engagement, exploration, explanation, elaboration and evaluation. STEMscopes is designed for teachers to use all five phases weekly to engage their students. Each phase has a specific function and contributes to the teacher’s coherent instruction, as well as to the learners’ formulation of a better understanding of scientific concepts. The BSCS 5E instructional model is crucial for them to engage with, to start seeing achievement gains. The product also includes intervention and acceleration, to give teachers additional opportunities to identify and close gaps in student content knowledge, which can also lead to crucial achievement gains.

“I envision a world where every student is a motivated, engaged, successful STEM learner. Accelerate Learning has taken great strides toward making that vision a reality. To disrupt the status quo and bring STEM to underserved and underrepresented students, we set an affordable price point for STEMscopes — as low as \$5.45 per student, per year. To meet schools where they are, STEMscopes’ curriculum, print materials, and exploration kits can be used in traditional, blended, and one-to-one classrooms.”

– Vernon Johnson, CEO



ACCELERATE LEARNING BY THE NUMBERS

AVERAGE WEEKLY USAGE

416k

Teacher scope usage per week

935k

Student scope usage per week

26k

Student game usage per week



REACH

5.9m

Users

5.3m

Students

5.71k

Educators

20k+

Schools

2k+

Districts

50

States, as well as the District of Columbia

13

Countries

ACCESS

58%

Free-reduced lunch students

57%

Students of color

39%

Latinx: 39% (vs about 25% nationally)

18%

Black: 18% (vs about 16% nationally)

34%

White: 34% (vs about 50% nationally)

PRODUCT OUTCOMES

OUTCOME 1: IMPROVING THE PASSING RATE ON STANDARDIZED TESTS

State- and grade-specific passing rates on standardized tests; improved passing rates for districts that used STEMscopes, rather than another science curriculum. The results for Texas, Georgia and Mississippi:

Metrics for school year 2018-2019:

	STEMscopes Districts	Non STEMscopes Districts
Texas	72%	69%
Mississippi	54%	51%
Georgia	41.1%	38.7%

OUTCOME 2: IMPROVING THE PASSING RATE ON STANDARDIZED TESTS FOR STUDENT SUBGROUPS IN TEXAS

Evaluate passing rates by subgroups of fifth-grade students, with focus on economically disadvantaged, African American, Latinx, and Limited English Proficiency (LEP) student subgroups.

Metrics for school year 2018-2019:

	STEMscopes Districts	Non STEMscopes Districts
Disadvantaged Students	66%	62%
Limited English Proficiency Students	57%	54%
African American Students	60%	56%
Latinx Students	68%	65%

OUTCOME 3: IMPROVING THE PASSING RATE ON FLORIDA'S EIGHTH-GRADE, STANDARDIZED SCIENCE TEST

Improved passing rates for “high usage” STEMscopes schools, versus “low usage” STEMscopes schools. The focus is on Florida middle schoolers, to highlight a different type of outcome at a different grade level, and in a different state.

Metrics for school year 2018-2019:

	High-usage STEMscopes schools	Low-usage STEMscopes schools
The average passing rate	54%	44%

1 BAKERSFIELD CITY SCHOOL DISTRICT — EXTENDED LEARNING PROGRAM. BAKERSFIELD, CALIFORNIA

BACKGROUND

In BCSD, as in many districts across the country, many children are unsupervised at home after school while their parents are at work. Research shows that when children don't have a place to go when the school day is over, juvenile crime and victimization peak, and students miss out on valuable learning opportunities.

For this reason, the district launched an Extended Learning Program (ELP) in 2000 to provide a safe, after-school education, enrichment, and youth-development program for students in grades one through eight. The ELP now serves 6,500 students, across 32 elementary schools and seven middle schools. It is led by administrative staff at the district level, and by a site coordinator at each school. The program's main goals are to improve students' academic achievement, increase positive behavior, and enhance attendance.

CHALLENGE

While STEAM — science, technology, engineering, art, and math — is a key component of the ELP, the district had struggled to find engineering-curriculum materials that could effectively engage and challenge middle school students.

“My students really like STEM, but they said that our previous engineering curriculum was too easy,” said Felicia Kent, site coordinator at Sequoia Middle School. “They'd finish an activity within 15 or 20 minutes, and then ask, ‘What are we doing next?’”

“We want to help our students develop a better understanding of what engineering is,” said Pedro Garcia, who serves as the instructional specialist for the ELP district wide. “We have students who come from very low-income homes. Many of their parents don't have a high

school diploma, and many work in the fields. We want to provide students with tools to show them that there are numerous opportunities out there for them. We had utilized engineering programs after school before, but they didn't give our middle school students the opportunity to explore or be creative or think outside the box. We were looking for a program that would be more hands-on and engaging for them. At the same time, we wanted to find ways to improve student attendance and discipline. We thought if we could shift students' mindsets and get them more involved, then that would alleviate the issues we were seeing — and that's exactly what DIVE-in Engineering has done.”

SOLUTION

BCSD began using STEMscopes DIVE-in Engineering in the ELP in its middle schools in the fall of 2018. DIVE-in Engineering is a comprehensive, online, hands-on engineering curriculum. Available in bundles for grades three to five, and six to eight, the DIVE-in Engineering kits contain all the materials students need to become creative makerspace engineers and to build projects. BCSD purchased the sixth-grade to eighth-grade bundles, which allow students to explore nine different engineering solutions across three units: On the Move, Around the House, and Eyes, Ears and Hands.

Each kit provides practical, inquiry-based educational experiences that encourage students to do what real-world engineers do: Deconstruct, Innovate, Vary, and Explore. Using the DIVE method, students:

- DIVE-in Engineering also offers a variety of teacher resources, including guides with step-by-step instructions, rubrics, and teacher toolkits.
- Take apart and examine a working prototype — recording measurements, making diagrams, and taking notes (Deconstruct).

- Reverse-engineer the prototype and make their own based on what they learned (Innovate).

- Analyze what they created, and brainstorm ways to make it different (Vary).

- Use the knowledge and skills they gained in the previous steps to solve the original problem in a new way or apply their solution to a new problem (Explore).

RESULTS

Improving attendance and reducing discipline issues.

“Attendance and discipline have most definitely improved this school year since we introduced DIVE-in Engineering,” said Garcia. “Recently, one of our students had an incident and his mom was called to the school. She was shocked to hear that her son was in trouble. This is a student who used to get in trouble a lot, but once he started DIVE-in Engineering, that stopped. We discovered that he really enjoys building and creating things. Even his parents didn't know that before. So, we told him that if there was another incident, then he wouldn't be able to participate in the STEM Carnival and show his engineering project. He was so bummed to hear that, so he agreed to our terms. In the end, he was able to go. That's something we like to see — students who want to be at school because they want to learn and create and be involved. They don't want to be out looking for trouble. His mom was also really happy to see that he wanted to be part of something and that he took responsibility for his actions and understood the consequences if he didn't improve. He was so excited to participate in the STEM Carnival and show his friends and his parents what he had designed and built all on his own, without a book or instructions. His parents are so thankful. They say that now all he talks about is building and creating, and how he wants to be at school so he can do that. That's a huge change in behavior.”

Building STEM and 21st-century skills.

“In the Extended Learning Program, we want students to build relationships within their groups, and learn how to communicate, collaborate, and problem-solve. DIVE-in Engineering has provided all of that,” said Garcia. “Before we introduced DIVE-in, we spoke with a couple of eighth graders and they said the first thing that came to mind when they heard the word ‘engineering’ was ‘math.’ They said, ‘Ugh, you're going to bring in math. It's going to be really hard. It's not going to be any fun.’ But once they saw DIVE-in Engineering, and that it was engaging and hands-on, they changed their minds and changed the way they thought about engineering.”

Getting more kids involved.

“We all enjoy having DIVE-in Engineering in the Extended Learning Program. It's even more exciting to hear kids tell their friends, ‘You have to join the after-school program because we're doing this!’ At my site, I have a waiting list of kids who want to come into our program because they see what we're doing. It's amazing to see more kids wanting to become involved,” said Tinoco.

2 UNDERSTANDING TEACHER AND ADMINISTRATOR USE OF STEMSCOPES AND ADDITIONAL NEEDS DURING DISTANCE LEARNING

BACKGROUND

At the end of May, we posted a voluntary survey on STEMscopes.com for teachers and administrators about distance learning during the COVID-19 pandemic. We asked about their STEMscopes usage, what we do well and what we can improve, and about plans for the future. Over a thousand teachers and 150 administrators from at least 25 states responded. Responses indicated that administrators and teachers had little time to prepare for distance learning. Over 70% of teachers reported they had to learn new digital programs, with 30% indicating they were provided less than a half a day of training on digital programs, and 15% reporting no training at all.

How STEMscopes supported distance learning, spring, 2020:

Over 60% of administrators noted that having access to STEMscopes made the transition to distance learning easier. In addition, over half of administrators indicated that STEMscopes was the only STEM platform their schools used for distance learning. In turn, over half of teachers relied on STEMscopes for most or all of their STEM content, many noting that it was easy to use, and provided a variety of high-quality science content. One administrator noted that, “The number of choices for activities STEMscopes provides really allows us to meet the students with what they are interested in, and allows the teachers to save time by not having to search all over the internet for ideas.” Teachers agreed. For example, one teacher told us: “I love STEMscopes. I love the reading (STEMscopespedia and Reading Science), the writing, and the assessments. All, very well done. Those transferred nicely into the online-teaching and learning environment. I appreciate all of you, and hope you know that this is a WONDERFUL curriculum. I am grateful for STEMscopes! Thank you so much!”

Teachers also reported how confident they felt using STEMscopes to support struggling students during distance learning, with 80% indicating they felt “very,” “extremely,” or at least, “somewhat” confident, while 93% felt confident supporting advanced learners. For example, one teacher remarked: “I use several elements of STEMscopes to support my struggling students. Having the leveled Reading Science, Intervention components, and especially, Cloze activity, helps me gauge their understanding of the material. Students know what to expect, as the elements have familiar formats from one unit to the next. Once each activity has been explained and modeled, students do well on their own, with some assistance.”

One of the elements of STEMscopes that teachers relied upon was STEMscopes’ high-quality, safe video content, with 30% of teachers endorsing STEMscopes videos as enhancing distance learning. One of the teachers let us know that “The idea of them having to watch the videos in order to answer questions makes them more responsible. They were also able to self-pace even though I gave them due dates.” Another teacher commented “I mostly like the Content Connection Videos because I know the videos are vetted for safety and won’t be blocked by district safety software.”

Administrators reported that they were relieved that students had access to content that was aligned to state and national standards. For example, this administrator told us, “I really like that you go standard-by-standard. I also like the hands-on and interactive technology part of the curriculum. It was a huge help when our school had to go online.”





CEO Mark Angel
FOUNDED 2018
NOTABLE CO-INVESTORS Vertical Venture Partners, Houghton Mifflin Harcourt, Rethink Education, GSV, Amazon Alexa Fund, Google Assistant Fund
WEBSITE www.amiralearning.com
HEADQUARTERS Napa, California
FOCUS Early literacy

COMPANY

Amira Learning is a web-based, AI-powered teacher’s assistant for early literacy. “Amira” is an avatar, able to listen to students read out loud, discern errors, assess mastery and deliver real-time tutoring. The software couples Carnegie Mellon University’s work on intelligent tutoring, with state-of-the-art speech recognition from Amira investors Google and Amazon. Amira has worked with leading reading scientists to ensure that the software is grounded in neuroscience and psychometrics.

BUSINESS MODEL

Amira is sold to school districts and schools through a distribution partnership with Houghton Mifflin Harcourt on a per-student, annual-subscription-fee basis.

CUSTOMER TESTIMONIAL

“Amira Practice does what the teacher doesn’t have time to do. As a fourth-grade teacher, I don’t have enough time to intervene — specifically or intentionally — like this with my Tier 1 students reading at the second- and first-grade levels. Amira does just that. She is a game changer!” — Teacher, Gentry Intermediate School, Arkansas



MARK ANGEL

CEO and Co-founder

Mark Angel, Amira’s CEO and Co-founder, is the chief inventor on 10 patents in the NLP area. He is also the founder of three, successful artificial-intelligence startups, spanning three decades. Prior to founding Amira, Mark was the CTO of Renaissance Learning, an ed-tech company that produced the two, most widely used reading applications in K-12 to date: Accelerated Reader for practice, and Star Reading for assessment.



PETE JUNGWIRTH

CTO and Co-founder

Pete Jungwirth, Amira’s CTO and Co-founder, is an engineering lead with 20-plus years of experience in ed-tech. Before Amira, he was the head of engineering at Renaissance Learning. Pete has decades of experience creating and managing engineering efforts for educational software in most known architectures, at enterprise scale. Pete leads all engineering efforts at Amira.

PAIN

Reading is life’s most important skill, and early reading success dictates life success. Students who are not proficient readers in the third grade are four times more likely to drop out of high school, will have 60% lower employment rates, and will experience a 34% decrease in lifetime earnings. Yet current approaches to creating fluency have failed: 65% of third-grade students are not proficient; 42% are, essentially, illiterate; and these results have not changed meaningfully in the last 25 years.

COVID-19 is now severely exacerbating this reading-and-achievement gap, as K-3 students are projected to lose 50% to 70% of this year’s gains.

SOLUTION

Reading fluency can only be achieved through productive reading practice with a good reader. However, one-to-one tutoring requires time, skill, and/or resources (i.e., private tutoring) that are in short supply. Amira represents an always-on, infinitely patient, highly trained, personalized reading tutor. The Amira avatar listens to students while they read, and, as a student stalls or makes a mistake, she draws from over 30 different, “micro-interventions,” backed by reading science.

PRIMARY PRODUCT STAKEHOLDERS

Students, teachers and parents

RECOMMENDED PRODUCT USAGE

For students to show greater or faster improvement in overall reading achievement (fluency, comprehension, vocabulary), students and teachers must ...

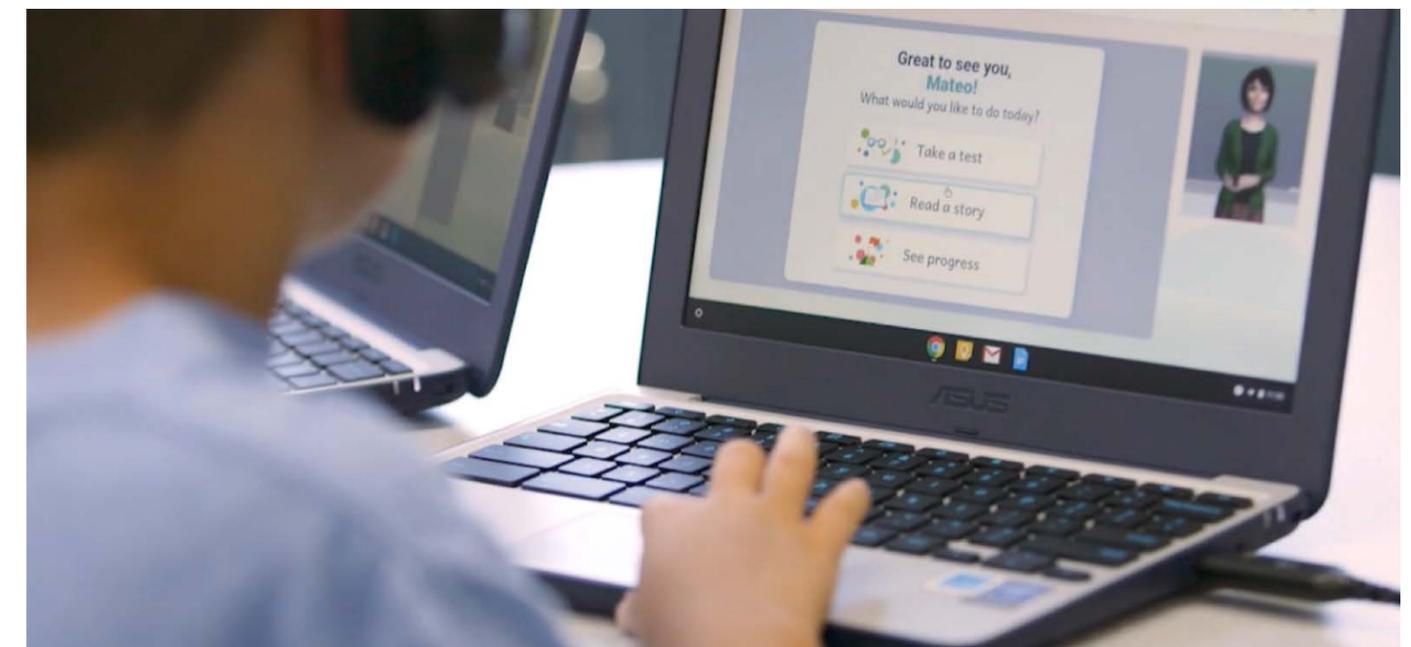
For students:

- Assessment: Take a five-minute, automated, oral-reading-fluency assessment and dyslexia screener, as assigned by the teacher.
- Practice: Students spend 30 to 60 minutes per week engaging in practice.
- Select stories within their zone of proximal development; read stories with Amira while receiving real-time coaching and feedback; review results; track progress.

For teachers:

- Assign assessments and practice time.
- Review student activity.
- Monitor student progress and needs.
- Plan lessons based on data reports.

“Amira is focused on helping children acquire life’s most-important skill: reading. Our mission is to help every child become a motivated and masterful reader by providing access to an always-available, highly trained, infinitely patient, reading tutor.”
– Mark Angel, CEO and Co-founder



AMIRA LEARNING BY THE NUMBERS

AVERAGE WEEKLY USAGE

4.7k+

An average of sessions per week over the past six months

REACH

37k+

Users

34k+

Students

3k+

Educators

175

Schools

82

Districts

26

States

ACCESS

43%

Free-reduced lunch students

40%

Title I schools

20%

English language learners

60%

Students of color

Demographic-data breakdown % other or unknown

41.4%

White

35.2%

Latinx

12.9%

Black

6.3%

Asian Pacific

0.4%

American Indian

3.8%

Multiethnic

PRODUCT OUTCOMES

OUTCOME 1: INCREASED NUMBER OF USERS (ACCESS)

	2019	2020
Increase in the number of states where Amira is in use	5 States	26 States
Increase in the number of students using Amira	2,200 Students	34,000 Students

OUTCOME 2: IMPROVED STUDENT LEARNING AND ENGAGEMENT

DESCRIPTION: Improves reading fluency more than alternatives, as measured using standard assessments.

2019: not tracked; 2020: multiple districts have seen accelerated growth of **0.3** growth points per week in Words Correct Per Minute for students using Amira 30-plus minutes per week.

DESCRIPTION: Boosts student engagement, as measured by increased, independent reading time.

School year 2018-2019: limited minutes of reading time with Amira.

School year 2019-2020: **336,000**-plus minutes (or 5,600 hours) of independent, scaffolded reading time with Amira.

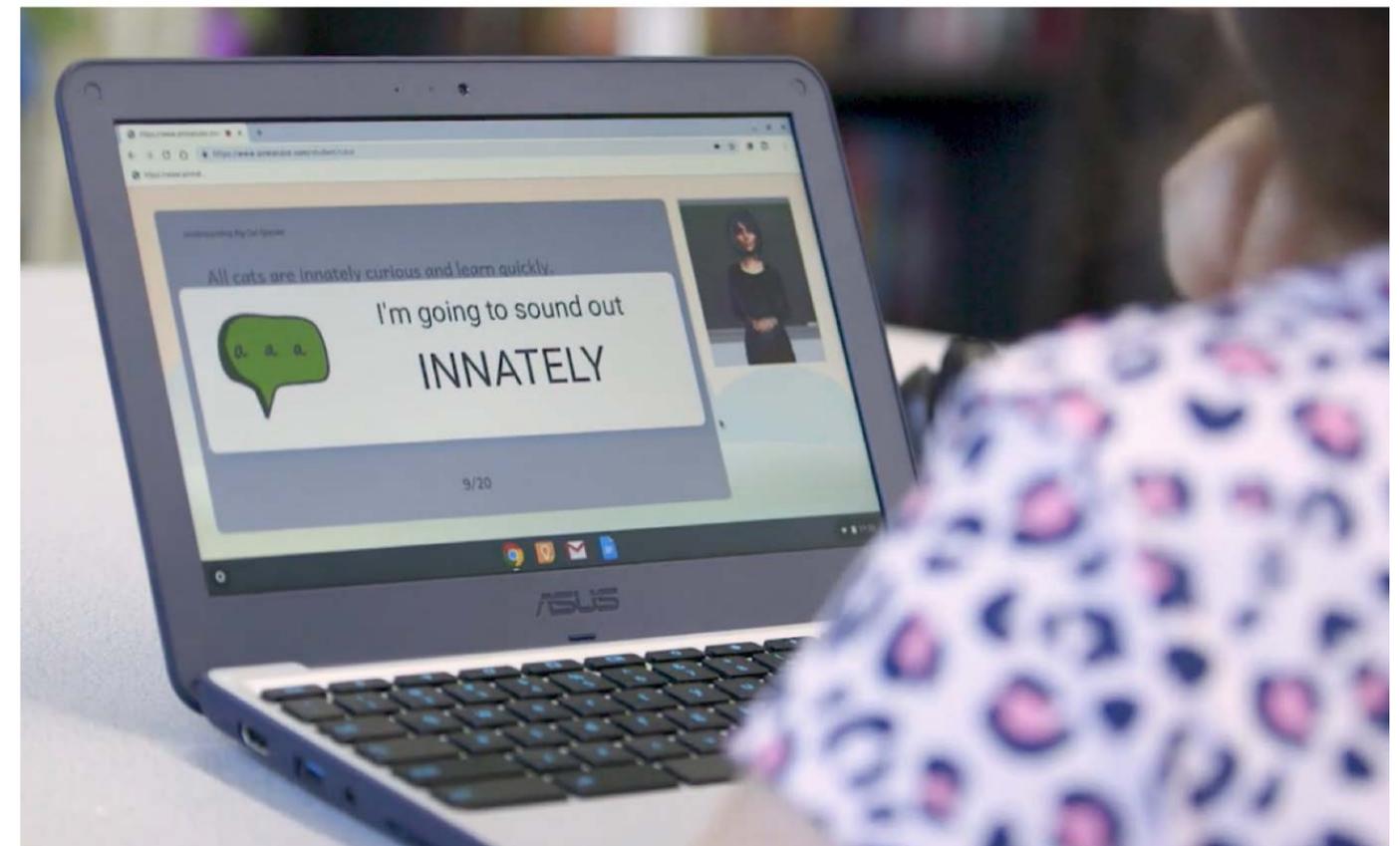
OUTCOME 3: MORE-EFFECTIVE TEACHING PRACTICES

DESCRIPTION: Save time (more than a hundred hours per year), which can be allocated to instruction rather than assessment tasks.

2019 and 2020: Anecdotal evidence suggests that teachers see real value in time savings provided by Amira.

DESCRIPTION: Use actionable data generated by Amira to plan and execute reading instruction that is more-tailored to individual students' needs than they could have without Amira.

2019 and 2020: Anecdotal evidence suggests that teachers are using Amira insights to help guide student instruction.



1 AMIRA'S USAGE DURING SCHOOL CLOSURES

With the school year wrapping up, the Amira Learning team has been able to measure Amira's impact in many districts. Across multiple districts, e.g Impact Public Schools (Washington), Savannah (Georgia); Stockton USD (California), we have seen accelerated growth of 0.3 growth points per week in Words Correct per Minute for students using Amira 30-plus minutes per week, as compared to nonusers of Amira.

To put this growth into context, the 0.3 extra Words Correct per Minute in weekly accelerated growth translates to a student at the 35th percentile of achievement at the beginning of the year getting to almost the 50th percentile by the end of the year.

In Elmira School District (New York), the district pivoted its pilot to enable students to use Amira at home as part of a distance-learning plan. Students, parents and teachers, all, had incredibly positive responses to the use of Amira.

"Students seem engaged, and I can learn so much about my students' reading ability. It gives me results so quickly." — Second-grade teacher

"My child asks about practicing with Amira at home." — Parent

"She really helps me read better." — First-grade student

Savannah-Chatham County Public Schools (South Carolina): The district offered Amira to all students (K-3) for at-home use after COVID-19 shutdowns. It is continuing with an optional reading program through the summer.

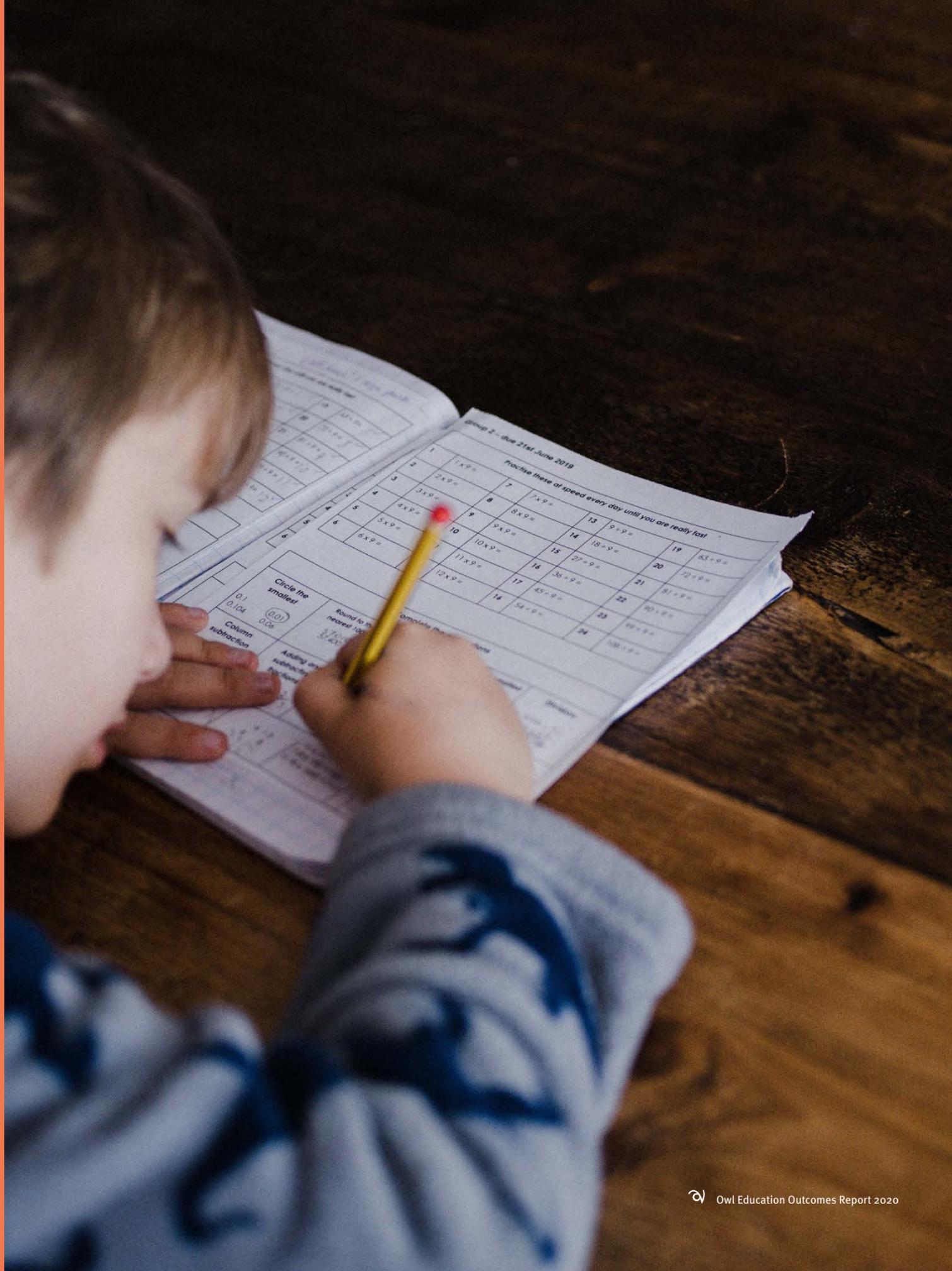
One first-grade student in Savannah-Chatham County Public Schools got so engaged while reading with Amira that he asked her for a tissue because he didn't want to get up and stop reading.

AWARDS WON

In the last year, Amira has received the following awards or recognition:

- 2020 Winner of the Breakthrough Award for Best Online Tutoring Solution
- 2020 Tech for Learning Best of Show at TCEA
- 2020 CODiE Award Finalist
- 2020 Xtreme Tech Challenge global game-changing Education startup
- 2019 Best of Show at ISTE
- 2019 Global Startup Super League at 2019 EdTechX Europe
- 2019 SxSWEDU Launch Competition Finalist





CEO Jose Ferreira
FOUNDED 2017
NOTABLE CO-INVESTORS Tribeca Venture Partners, Obvious Ventures
WEBSITE www.bakpax.com
HEADQUARTERS Milford, New Jersey
FOCUS Artificial-intelligence Grading

COMPANY

Bakpax uses AI to read handwriting and grade assignments in seconds. It gives teachers deeper insights into performance, and gives students immediate feedback. Bakpax also offers teachers a library of thousands of free, standards-aligned, editable, auto-gradable assignments that they can use with Bakpax's auto-grading app, or in their personal content libraries. Students can complete their work on Bakpax with just a phone and a piece of paper (or they can use a computer or tablet if they prefer), making learning accessible to everyone.

BUSINESS MODEL

BakPax offers subscriptions directly to teachers and districts for its AI-powered auto-grading app. As part of the app, Bakpax has easy-to-use, content-creation tools, plus a library of thousands of free, standards-aligned, auto-gradable worksheets. Access to Bakpax's student analytics and insights is also included in every subscription.

CUSTOMER TESTIMONIAL

"I can't tell you how many people I have told about Bakpax; this is an amazing product. With the digital learning that my students need to engage in, it takes less time to assess them because the answers that I wrote are right in front of me for each student. It has made a tremendous difference in the way I am assessing students and the time that it takes me to assess."

— Erin Barresi, Maryland middle school math and language arts teacher.



JOSE FERREIRA

Co-founder and CEO

Jose is the CEO of Bakpax, named for its artificial-intelligence tool that reads handwriting and auto-grades student work. Bakpax saves teachers' time, and it solves students' access problems by allowing them to complete all their work with just paper and/or a phone. Jose is an expert in using AI to personalize learning for students. He has been recognized by the World Economic Forum as a technology pioneer in education.



TREVOR SUMMERS SMITH

Co-founder and CTO

Trevor is passionate about ensuring that everyone has access to education. In his position as Co-founder and CTO at Bakpax, he focuses on building culture and processes within the organization that encourage clarity, alignment and agency to connect Bakpax to the world. Prior to founding Bakpax, he was the technical and product lead at Arena, a highly secure product, used by the nation's top healthcare providers; and the lead architect at Knewton.

PAIN

Teachers are overworked, underpaid and often, underappreciated. One of their greatest burdens is the hundreds of hours they spend every year, grading schoolwork.

For students — and for their teachers — an additional challenge is access. Computers were supposed to improve education (and they did), but only for those students who have a computer they can use for school. A lot of kids don't.

SOLUTION

BakPax uses artificial intelligence and machine learning to read handwriting and auto-grade student homework. This saves teachers hours of time grading, plus it gives them deeper insights into student performance through daily formative data.

Bakpax also aims to address the challenge of access to high-quality education. While many students don't have a computer or a tablet, everyone has paper and access to a phone. So Bakpax is giving students as much technology and content as possible through their mobile phones.

PRIMARY PRODUCT STAKEHOLDERS

Teachers, districts, administrators and students

RECOMMENDED PRODUCT USAGE

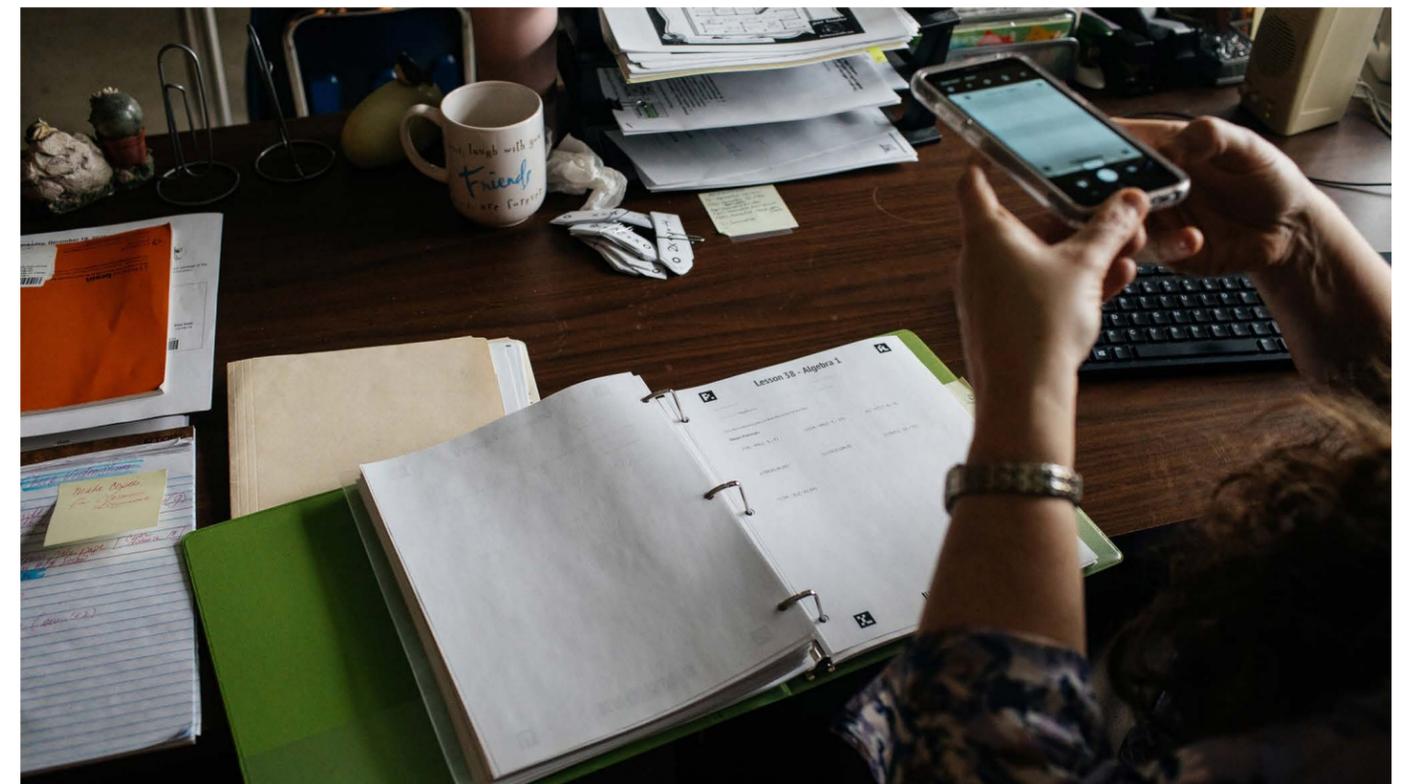
Teachers can engage students on Bakpax every day. Bakpax's auto-grading app grades homework and assessments. It is easy to use for students because it works whether they have computers or not. They can use just a piece of paper and a phone, or they can complete their work on a computer or tablet, if they prefer.

Bakpax helps teachers to auto-grade assignments, give students instant feedback, and gain insights into student performance.

Teachers create virtual classrooms on our easy-to-use app, and then create or import assignments, use assignments from our free library of standards-aligned content, or engage our content-creation team to import assignments for them. Every teacher who uses Bakpax gets a free teacher's assistant along with the service — someone to help them as much as they need or want, to send them new content, answer questions, or to provide them with other resources they might find useful.

“My lifelong professional goal has been to harness the power of all the concept-mastery information students generate when they study, and use it to improve their learning outcomes. While students working through content on their own is a crucial aspect of learning, I also believe that the single-best way to improve education outcomes is by helping teachers do the best job they can. I co-founded Bakpax to try and do both.”

- Jose Ferreira, Co-founder and CEO



BAKPAX BY THE NUMBERS

USAGE

100%

An increase in classroom creation

67%

Student submissions

50%

Onboarding completion

27%

Student enrollment

REACH

21k+

Users

8k+

Students

13k+

Educators

CASE STUDY

1 COVID-19 REFLECTIONS

The vast majority of K-12 education institutions in the United States was largely unprepared to violently transition online. Schools have had to do a lot of new things quickly, some of them quite difficult, and they received no new funding and little guidance in how to do them. The result, understandably, has been tumultuous. We saw reports of districts that stopped teaching anything new for the remainder of the school year, as early as March.

No one ever planned for this because no one ever thought it would happen. Parents have had to support their children's studies using new software tools that, of course, their second-grader didn't know how to use. Some of these tools were brand-new to teachers, as well. It's been very rocky. And one thing that's becoming obvious is that, when kids go back to school in the fall — whether they go back in person or need to extend their distance learning — many of them will be up to a quarter-year behind where they should be. This is one of the most important, and challenging, times the world has faced in the last hundred years.

If this pandemic had happened even 10 years ago, learning would have come to a complete halt. But today, we have technology that has the potential to create a better outcome. For ed-tech, this has meant pivoting to meet the needs of teachers in providing distance learning. In many instances, it has meant evolving rapidly — anticipating today's needs, and the needs to teachers and students in the future. With the reliable video conferencing apps available today for our smartphones, teachers can run fully online classes and lectures. Teachers are also using phones to check in with individual students via call or text.

The tricky thing has been how to manage assignments. Teachers post assignments online, but then the student has to complete it, return it to the teacher, and the teacher has to grade it. So, in some ways, it's turning out to be a perfect time for our company, Bakpax, to launch our service. We use AI to read handwriting and to "auto-grade" assignments. Students can complete assignments on paper or on their phones. Teachers don't have to grade — we do it for them. Students and teachers both get instant feedback. We also give teachers lots of free content, so they don't have to waste time making it or hunting for it online. And the service is totally free. So Bakpax is proving to be quite useful and popular right now, which is gratifying. It's nice that we're able to contribute something positive to help teachers in this very difficult time.

2 A TEACHER'S TESTIMONIAL

Jennifer Turner, New Jersey middle school and high school math teacher, as quoted in the NY Times article, “The Machines Are Learning, and So Are the Students”:

Jennifer Turner’s algebra classes were once sleepy affairs, and a lot of her students struggled to stay awake. Today, they are active and engaged, thanks to new technologies, including an artificial intelligence-powered program that is helping her teach.

She uses the platform, Bakpax, that can read students’ handwriting and auto-grade schoolwork, and she assigns lectures for students to watch online while they are at home. Using the platform has provided Mrs. Turner, 41, who teaches at the Gloucester County Christian School in Sewell, New Jersey, more flexibility in how she teaches, reserving class time for interactive exercises.

“The grades for homework have been much better this year because of Bakpax,” Mrs. Turner said. “Students are excited to be in my room, they’re telling me they love math, and those are things that I don’t normally hear.”





CEO Alex Grodd
FOUNDED 2008
NOTABLE CO-INVESTORS Reach Capital, Michael and Susan Dell Foundation, New Markets Venture Partners, Scott Cook and Signe Ostby
WEBSITE www.betterlesson.com
HEADQUARTERS Cambridge, Massachusetts
FOCUS K-12 professional development

COMPANY

BetterLesson reimagines professional learning through a combination of personalized, job-embedded support from expert coaches; curated instructional resources housed in a digital, professional learning lab; and a methodology for facilitating continuous, joyful, adult learning. BetterLesson’s one-to-one, virtual coaching; small-group, virtual-learning experiences; and onsite workshops and learning walks support K-12 educators and leaders to design and implement student-centered strategies that enhance engagement and growth. BetterLesson’s “Try, Measure, Learn” methodology helps teachers try new instructional strategies, measure what works, and iterate based on the learning.

BUSINESS MODEL

BetterLesson sells directly to schools and districts: It engages with superintendents, assistant superintendents, PD directors, and principals. BetterLesson has also found success partnering with mission-aligned foundations and strategic partners that have deep connections with specific communities or networks of schools.

CUSTOMER TESTIMONIAL

“BetterLesson is the only provider so far that I’ve seen that has the comprehensive support we need for distance learning. Others I’ve seen are more geared toward technology, but BetterLesson’s model integrates the instruction and content, so, whether we’re back in the building, or if we’re in some kind of hybrid model, those skills will be transferable.”

— Director of Curriculum and Instruction, Medford Public Schools, Massachusetts.



ALEX GRODD

Co-founder and CEO

Alex Grodd is the co-founder and CEO of BetterLesson. After graduating from Harvard with a degree in political philosophy, Grodd taught sixth-grade social studies in the Atlanta Public School system as a Teach For America corps member, where he founded the middle-school debate team and the Outward Bound Club. He then moved to Boston and taught sixth grade English at Roxbury Preparatory Charter School. He created BetterLesson to address the instructional challenges that he faced during his time in the classroom.



ERIN OSBORN

Co-founder and COO

Erin Osborn is the co-founder and COO of BetterLesson. Before BetterLesson, Erin had taught kindergarten in Cambridge Public Schools; she did pure-water projects in southwest Kenya with Engineers Without Borders. She also started a nonprofit, Education Action, with author and activist Jonathan Kozol. Erin graduated summa cum laude from Dartmouth College with honors in political philosophy. She's also an ocean-swimming enthusiast, who enjoys hanging with eagles and seals in Maine.

PAIN

The way we “do school” has changed. To take on the challenges of the future, our children must learn to be collaborators and creative problem solvers. This means creating flexible, student-centered learning experiences. Yet, traditional, professional development doesn't give teachers the same, growth-oriented support.

SOLUTION

BetterLesson partners with schools and districts to visibly grow teachers' and leaders' skills in creating student-centered, academically rigorous classrooms. BetterLesson's approach is personalized, action-oriented, and evidence-based. Together with their partners, they design a path to change instructional culture for the long term, keeping all learners at the center of their growth.

PRIMARY PRODUCT STAKEHOLDERS

District and school leaders, coaches and teachers

RECOMMENDED PRODUCT USAGE

Depending on the instructional vision of the partner, BetterLesson recommends a combination of professional learning services that include both one-to-one and one-to-many supports, as well as in-person and virtual experiences across cohorts of teachers and instructional leaders.

For all partner leaders:

BetterLesson's main points of contact commit to a discussion of program goals, metrics, and learnings, three times a year.

School leaders that are closer to the participants have regular check-ins with participants to ensure accountability, reinforce the vision, and gather feedback to capture wins and optimize the program.

For coaching participants:

Commitment to one-to-one sessions with a coach, 30 minutes every two weeks

In addition, participants must apply new strategies in between coaching sessions in the “Try, Measure, Learn” cycle. This entails about one to two hours in between sessions to plan and implement new strategies, and reflect on what worked and didn't work.

For virtual workshop participants:

Each virtual workshop is a commitment of two hours. Generally, participants will attend from one to three workshops in an academic year, depending on the partnership.

“While technology and curriculum are important, we believe that teachers are at the heart of preparing students to tackle the challenges of our rapidly changing world. Via our one-to-one, virtual-coaching and design workshops, and our in-person workshops and learning walks, we support educators to grow their practice and to implement truly student-centered learning models. We're seizing on a massive opportunity to reinvent the professional-development market and create experiences that drive teacher delight and efficacy.”

– Alex Grodd, Co-founder and CEO

BETTERLESSON BY THE NUMBERS

USAGE

15k+

Total coaching sessions during 2019-2020 academic year

883

Workshops during 2019-2020 academic year

REACH

565k

Users

275k

Students

11k

Educators

253

Schools

40

States and the District of Columbia

3

Countries including the United States, Canada and Israel

ACCESS

64%

Free-reduced lunch students

57%

Students of color

19%

Black

5%

Asian

43%

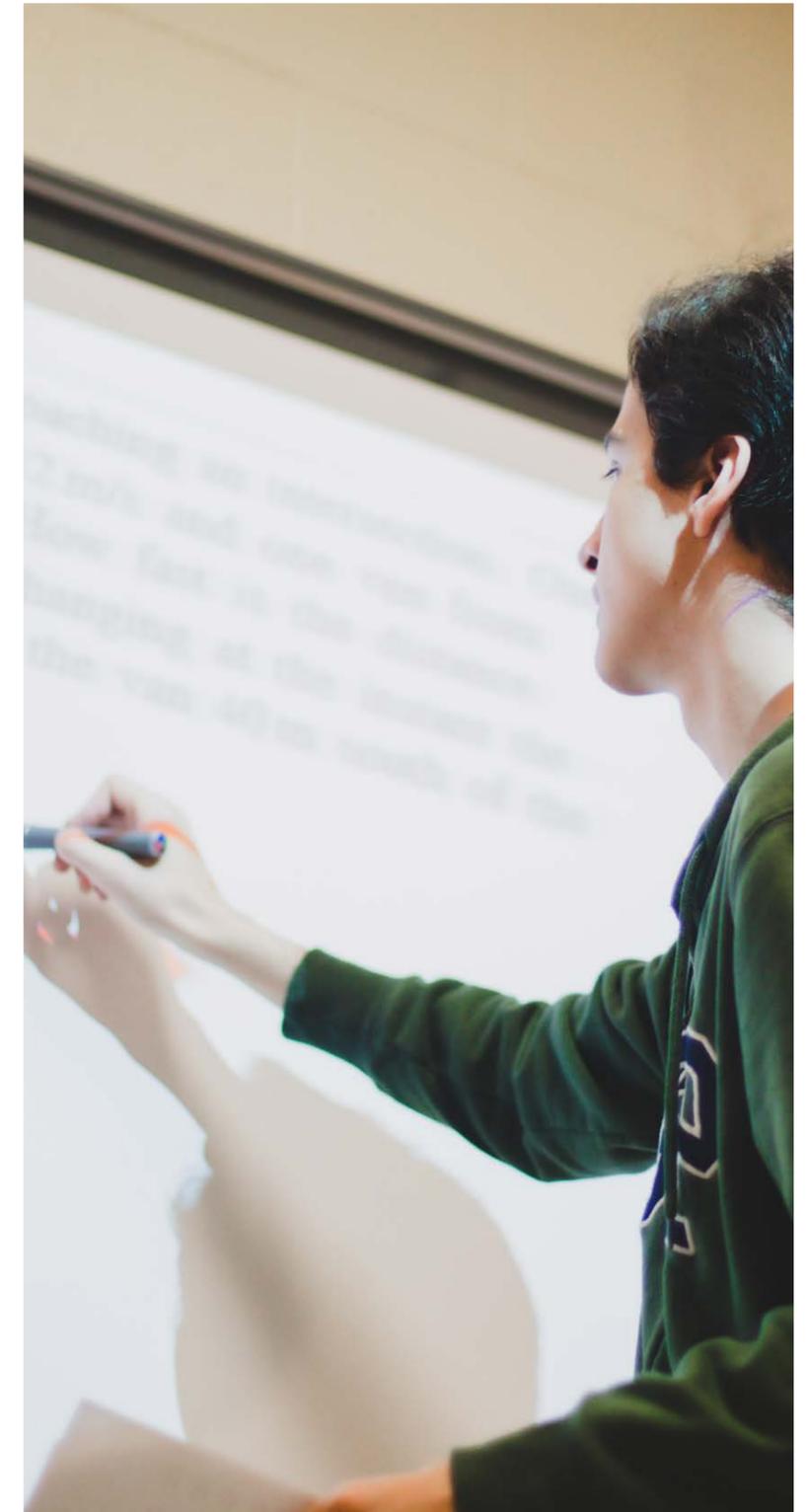
White

33%

Latinx

>1%

Native American



PRODUCT OUTCOMES

OUTCOME 1: ONE-TO-ONE COACHING DRIVES ACTUAL PRACTICE CHANGE

DESCRIPTION: Coaches support participants to identify new strategies that align with their goals, actually try them in practice, and reflect on learnings.

10,596 “highlights” of planning, evidence, and reflection recorded by participants (2018-2019).

8,788 “highlights” of planning, evidence, and reflection recorded by participants between January, 2020 and June, 2020.

OUTCOME 2: WORKSHOP PARTICIPANTS IMPLEMENT THE STRATEGY OR SKILLS COVERED

DESCRIPTION: Participants implement a resource or strategy learned in their workshops.

95% of participants implemented a new resource or strategy in the days following their workshop.

OUTCOME 3: SUPPORT EDUCATORS IN THE SHIFT TO DISTANCE LEARNING DUE TO COVID-19

DESCRIPTION: Provide teachers and leaders with the knowledge, tools, strategies and resources needed to make the sudden shift to teaching effectively – synchronously and asynchronously – in virtual environments.

224 virtual-distance-learning workshops held, serving 3,000 educators across 38 states, with **98%** of participants saying they are confident in their ability to implement what they learned during virtual workshops.



1 TENNESSEE DEPARTMENT OF EDUCATION

In 2015, the Tennessee Department of Education convened a “Personalized Learning Task Force,” to propose statewide pilots to support teachers to implement blended-learning environments in their classrooms. The Task Force chose Algebra I and Integrated Math I classrooms for the pilot. It began looking for partner organizations which could help it test its hypothesis that a blended-learning environment would ...

Support teachers in differentiating instruction.

Impact student proficiency levels.

Increase student ownership of their learning around their practice.

From teacher coaching, to student impact.

The department recognized that personalized coaching would help teachers, as blended learning represented a paradigm shift away from traditional pedagogical approaches. BetterLesson coaches supported teachers with one-on-one coaching sessions every other week via videoconference sessions. The model provided teachers with the structure and tools to try blended-learning strategies, measure student growth and reflect on the impact the strategies were having. Fifty teachers across 21 school districts participated in the pilot during the 2016-17 school year. The department gathered data to measure the correlation between the pilot, and changes in student growth, student ownership and teaching practices. In addition to quantitative data, teachers participated in surveys, interviews, focus groups, and formal and informal classroom observations conducted by department staff.

At the end of the 2016-17 school year, teachers reported that coaching had positively impacted student outcomes in their classrooms and had allowed them to strengthen their practice as educators. Administrators could see distinct changes in teacher practice, specifically, an increase in the use of technology to differentiate instruction for students. Department officials noted the pilot provided “evidence that technology can support teachers in delivering personalized instruction by leveraging data

and quickly diagnosing student needs.” The department ran a randomized controlled trial to test the effect of BetterLesson coaching on the quality of their districts’ blended-learning instruction through their “end of course” assessments. It found a statistically significant, positive impact on student achievement for all students. In particular, the greatest academic gains were seen among African American students, low-income students, and students with disabilities.

Results: An increased number of teachers differentiating instruction.

95% of teachers reported that BetterLesson coaching was having a positive impact on student growth.

96% of teachers would recommend Personalized PD to a colleague.

“I feel that if I did not have this PD, I would not have reached as many students that I have this year.” — Justin Lee, Morristown-Hamblen High School East, Hamblen County Schools.

“My students became more reflective. They started to learn how to evaluate themselves and their peers. The students learned how to work together in groups so the work would be more productive.” — Lynnette Cottrell, Heritage High School, Blount County Schools.



2 CHARLOTTE-MECKLENBURG SCHOOLS, NORTH CAROLINA

In May, 2019, Charlotte-Mecklenburg Schools and BetterLesson entered into a multiyear partnership to support the rollout of the district's newly adopted, middle school math program, "Open Up Resources 6-8 Math." The district's Chief Academic Officer, Brian Kingsley, was familiar with BetterLesson's impactful track record of providing coaching to teachers in seven, CMS Title 1 schools. Brian and his team recognized the pedagogical and content-knowledge gaps in the district's middle school math teachers, and they selected BetterLesson as the partner that could provide the targeted, job-embedded professional development teachers needed to successfully shift their practice. CMS had made a significant investment in its MS Math professional learning plan with BetterLesson, and by March 2020, BetterLesson had a portion in remaining services left to deliver to CMS. BetterLesson offered to convert the planned in-person services to distance-learning support for K-12 teachers.

On March 24, 2020, the BetterLesson team met with CMS' Director of Secondary Teaching and Learning, Jenni Greene. Jenni shared that the district's leadership and technical-support personnel were consumed with helping the district's 10,000 teachers set up their online learning courses in Canvas, the district's learning management system. Two thousand teachers were up and running, but 8,000 still needed to learn the basics of Canvas. After BetterLesson previewed a set of virtual workshops developed to support the rapid shift to distance learning, Jenni remarked that this kind of support would fill a gap the district couldn't address in helping the 2,000 teachers who were ready to engage with their students. Jenni shared her belief that the district was too focused on technical challenges, and BetterLesson was an ideal partner to provide a solution that supported the adaptive shift to teaching in a remote setting.

On March 27, 2020, BetterLesson offered virtual workshops to CMS teachers at eight o'clock, ten-thirty, and one o'clock. Only five teachers attended the

eight o'clock workshop, but word spread throughout the day and, by the conclusion of the one o'clock workshop, 141 teachers had participated. BetterLesson went on to offer sessions on March 30 and 31, and served a combined total of 702 CMS educators over the three days. On March 30, Jenni shared the following via email with BetterLesson: "We are so excited with the feedback being received for these BetterLesson offerings! I have a meeting this afternoon to get more information about current needs and wants from the district and what BetterLesson can do to help with that. Your product and services are far superior to many others!!! I knew that before, but it is really shining in this time of crisis."

Several administrators attended these sessions, and afterward, one leader wrote, "This distance-learning PD has been a breakthrough of knowledge for me and I am equipped with resources to be successful to empower students and families and staff. Thank you so much!"

Following these successful virtual workshops, CMS scrubbed its budget and concluded it could dedicate even more funds toward additional distance-learning support in April and May, 2020. Over the course of four weeks, BetterLesson provided virtual workshops on eight distinct topics to CMS teachers and leaders, as well as on-demand coaching to address individualized needs.

In post-workshop surveys, **100% of leaders and 99% of teachers reported that they felt confident in their ability to implement what they learned.**

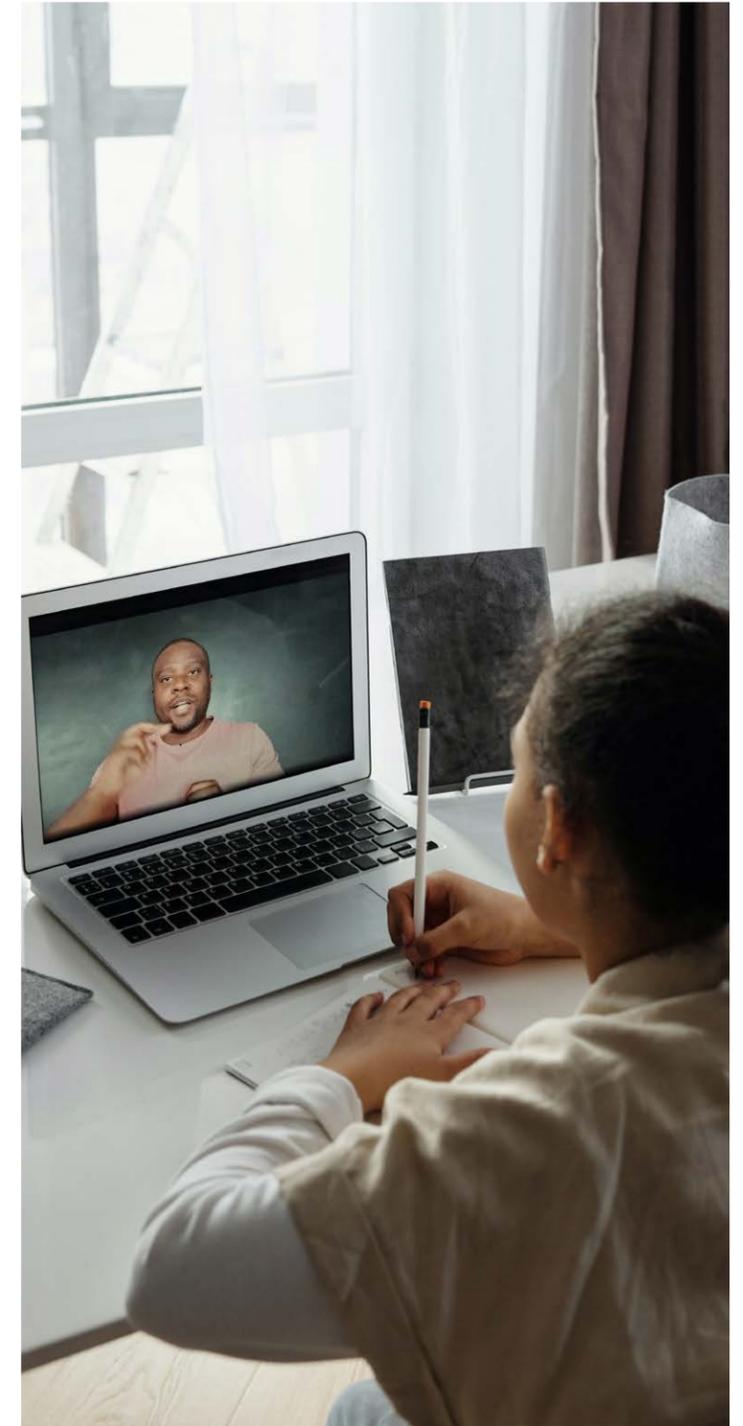
One teacher wrote, "This is the most that I have learned from a PD thus far. As a new teacher, I hear so many different resources mentioned but this is the first time I actually had access to all of them in front of me and could learn how to use them."

BetterLesson also conducted an efficacy survey in the weeks following workshops, and found that 95% of workshop attendees implemented a resource or strategy they learned in the days following their workshop, and

90% of respondents reported implementation went moderately to extremely well.

On April 28, 2020, BetterLesson received an email from Beth Thompson, the Assistant Superintendent for Academics in CMS. Beth wrote, "We celebrated you all AGAIN this morning on our Academics call. Your current PD course offerings are receiving positively rave reviews. We could not be more grateful for your time and energy in supporting our district in such an amazing way right now. We continue to be grateful to you. Thank you so very much. We look forward to what the future holds!"

On May 19, 2020, BetterLesson met with CMS's Executive Director of Professional Learning Learning and Leadership Development, Penny Presley. Penny was excited to begin a new scope of work with BetterLesson to support all 175 principals in CMS with leadership virtual workshops in July, 2020, as well as one-to-one virtual coaching for all CMS principals to ensure that their school sites are distance-ready.





CEO	Byju Raveendran
FOUNDED	2011
NOTABLE CO-INVESTORS	Chan Zuckerberg Initiative, Tencent, Tiger Global, Naspers, General Atlantic
WEBSITE	www.byjus.com
HEADQUARTERS	Bangalore, India
FOCUS	K-12 online learning

COMPANY

BYJU'S is the world's most-valuable private, ed-tech company, and the creator of India's most-loved school-learning app, which offers highly adaptive, engaging and effective learning programs for students in grades K-12, as well as for students studying for competitive exams, like JEE, NEET and IAS.

The apps have been designed to adapt to the unique learning style of every student, according to the pace, size and style of learning. BYJU'S is paving the way for new-age, geography-agnostic learning tools that sit at the intersection of mobile, interactive content and personalized learning methodologies.

BUSINESS MODEL

BYJU'S currently follows a "freemium" business model, whereby students get access to free content for about 15 days, after which they can subscribe for advanced levels. Students are encouraged to download and try the BYJU'S app before deciding to subscribe to the lessons for an annual subscription fee.

CUSTOMER TESTIMONIAL

"BYJU'S makes me feel like I have a teacher with me, every time, everywhere . It's very useful when I have any doubts. I daily spend 45 minutes on it, and I have made a special notebook for BYJU'S."

— Arayana, grade 5



BYJU RAVEENDRAN

Founder and CEO

Byju Raveendran is the founder and CEO of BYJU'S, an ed-tech company that is reinventing how students learn, through its learning app. Born to teacher parents in Azhikode, Kerala, he is a two-time Common Admission Test (CAT) topper and a National Math Olympiad winner. An entrepreneur by chance and a teacher by choice, he started BYJU'S with the vision to help students fall in love with learning and change the way India learns.

“We stayed focused on students while creating our go-to-market strategy. Our core model was 100% offline until 2015. We disrupted our model with a product-based one, where students can get content based on their pace, style and size of learning. An offline classroom doesn't allow that personalization. It can force attendance, but not attention. So, we offered an asynchronous, on-demand, personalized learning app for 4-to-17-year-olds.”

– Byju Raveendran, Founder and CEO

PAIN

BYJU'S noticed a huge gap in the way students learn, and how concepts should be learned. In a traditional, face-to-face learning setup, access to high-quality education and personalization of content has always been an issue. In traditional education systems, children are still getting trained to solve questions, and not ask questions. Learning happens because of fear of doing poorly on exams, and not for the love for learning.

SOLUTION

BYJU'S was launched to make learning accessible, effective, engaging, and personalized for everyone. BYJU'S learning program is a complete learning experience that integrates classes from the best of the teachers (who are empowered by tech-enabled teaching tools), assessments, and assignments that are personalized for every student, along with in-depth analysis and recommendations. Offering an engaging and effective learning experience, the program creates personalized learning journeys for individual students based on their proficiency levels and capabilities which helps them learn at their own pace and style.

In the lockdown period, BYJU'S has launched new features and offerings like:

1. BYJU'S Classes that offer online classes from India's best teachers, instant doubt resolution and one-on-one guidance from mentors.
2. New subjects, such as history, civics, and geography
3. Learning programs in vernacular languages

PRIMARY PRODUCT STAKEHOLDERS

Students

RECOMMENDED PRODUCT USAGE

BYJU'S app: Every student has a “Knowledge Graph,” based on their learning needs and speed. This links different concepts and helps students identify their strengths and areas for improvement. Students use the platform to take adaptive, interactive tests that help students master each chapter; watch recommended videos that prompt students to correct mistakes in a practice session; and practice questions, designed to evoke curiosity.

BYJU'S classes: With BYJU'S classes, students will be assigned a dedicated mentor who will offer one-on-one attention, comprehensive progress reports, and also, will suggest personalized classes to work on topics that they need to focus on. Regular subjective and objective tests will help evaluate a student's performance, too. Students can choose from weekday and weekend batches, and attend scheduled online math and science classes according to their school curriculum.

BYJU'S BY THE NUMBERS

USAGE

71

Minutes per day per student

REACH

57m

Students

1.7k

Rural and urban areas in India

ACCESS

60%

Users are from outside metropolitan cities.

PRODUCT OUTCOMES

OUTCOME 1: INCREASING ACCESS TO QUALITY LEARNING MATERIALS

Metric: **65%** of BYJU'S students are outside the top-10 cities in India.

Metric: BYJU'S made its app free for students at the start of COVID-19; this led to **13.5 million** new students joining its app to continue their education while schools remained closed.

OUTCOME 2: STUDENT ENGAGEMENT

DESCRIPTION: Renewal rates and student scores.

Metric: On average, BYJU'S overall renewal rate is **85%**, with most grades exceeding a **90%** score.

Metric: Students, who used to spend **70 minutes** on the application per session and come back, twice or thrice a week, pre-COVID-19, are now spending around **100 minutes** per day.



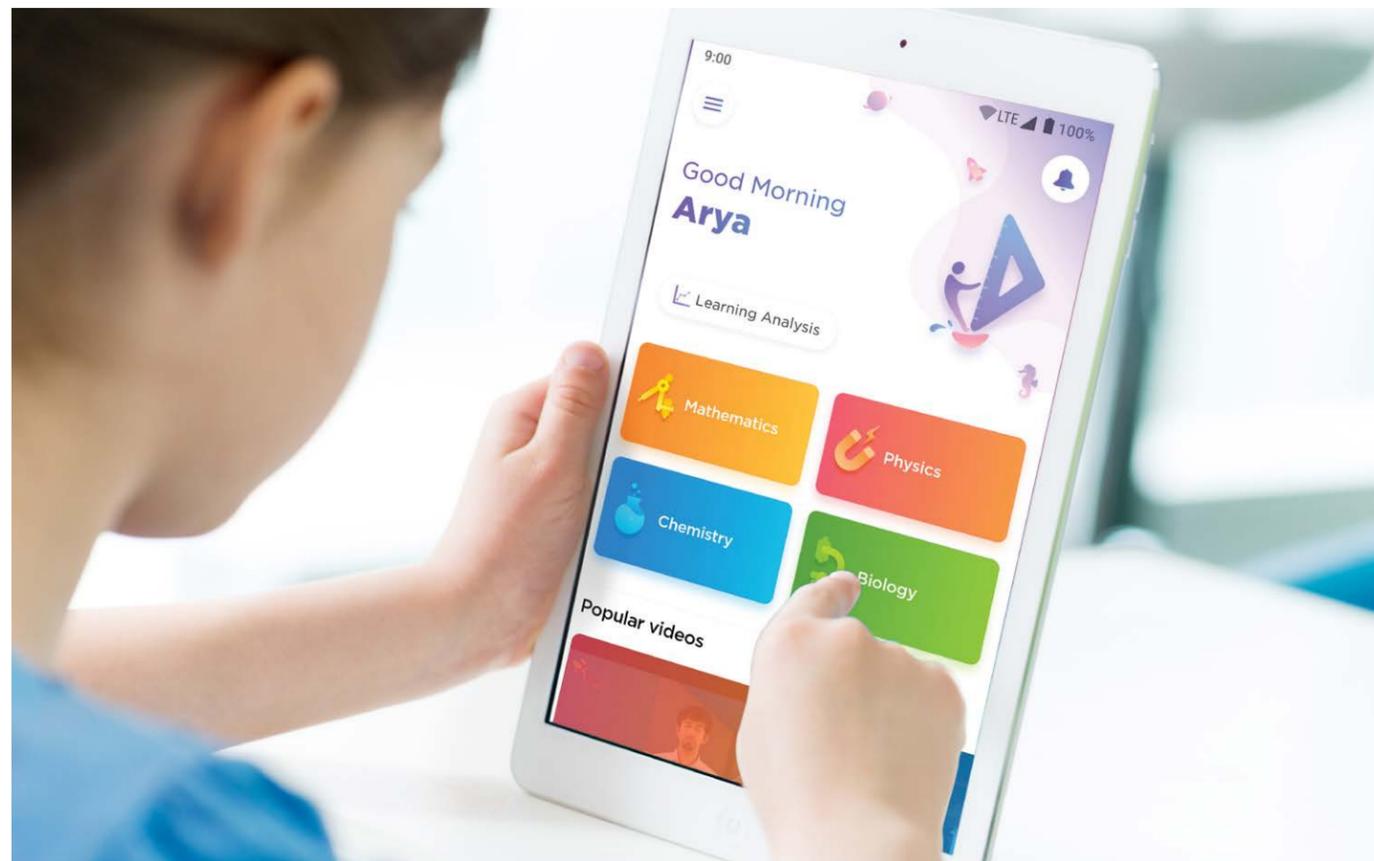
1 HOW DID BYJU'S TOPPER ISHITA SCORE IN THE 99TH PERCENTILE IN JEE MAIN?

“I was never a technically inclined person. In fact, if I go back and ask myself if I see myself giving these exams, I would say: No. I was always an artistic kind.”

But perhaps the balance of an artistic mindset coupled with immense hard work are the very things that helped Ishita Vyavahare crack JEE with a whopping 99.06-percentile score in the JEE Main. A clear-thinking, confident student from Pune, India, Ishita talks about the first time physics inspired her.

“In class nine, I read about Isaac Newton’s ideas for the first time. Newton has a very philosophical way of thinking. He always tried to find a deeper meaning to what he was doing. I thought that was profound. That was the first time it occurred to me that you could explain the entire world using physics and math,” says Ishita, introspecting.

BYJU’S — The Learning App is Ishita’s learning companion that helps her visualize important physics and math concepts. “I started studying from BYJU’S when I was in class 11, so all my concepts are from there. The visuals on the app make the topics all the more interesting and you can practice questions right after you learn a concept. That’s a great way to learn,” she adds.



2 BYJU'S PROVIDES FREE ACCESS TO ITS LEARNING APP TO THE CHILDREN OF MAHARASHTRA POLICE OFFICIALS

Pune: As the COVID-19 pandemic continues to persist, BYJU’S, the world’s most-valuable ed-tech company, has offered its entire learning app for free to the children of Maharashtra Police personnel. Even as the state of Maharashtra continues to be one of the states most affected by the pandemic, the police have been vital frontline fighters, ensuring smooth lockdown and spreading awareness among the citizens. With this initiative, children of over 100,000 police officials in Maharashtra across all classes will be able to access and learn from the app for free. Students can access from the comfort of their homes free online lessons, live classes by BYJU’S top teachers, practice tests, and interactive videos from the BYJU’S app .

To access the free lessons, officials can register through an online form. Once registered, they can download the app from the play store or app store to start learning.

Commenting on this initiative, Mrinal Mohit, the chief operating officer of BYJU’S, said, “Our police forces have gone beyond the call of duty at this time of crisis to safeguard the health and safety of citizens. We want to express our gratitude towards these COVID-19-warriors; and as a learning company, the most impactful way to demonstrate our solidarity is by ensuring that their children have access to the best learning solution from the comfort of their homes. The wards of Maharashtra Police officials will be able to access and learn for free from our app. We hope our initiative gives our brave officials one less thing to worry about during this uncertain time.”

Mrinal also added, “We would also like to congratulate Dr. K. Venkatesham, commissioner of Pune police, for spearheading the integration of digital technology in all walks of life, and for opening the gates for BYJU’S to come forward and help the community.”

Venkatesham commented, “Online education has been crucial and beneficial during the ongoing crisis to help children continue learning while staying safely at home. To cater to the educational needs of the wards of our police personnel, we have liaised with “BYJU’S — The Learning App,” which is a renowned name in the field of online education. This initiative will help close to 100,000 officials in the state, and we would like to thank them for taking a step to help the officials who are relentlessly protecting the people of the country.”

In the month of May, BYJU’S also provided free access to its learning program to the wards of the Delhi police. A UNESCO report states that the education of over 1.2 billion students across 153 countries has been interrupted because of the COVID-19 crisis. The agency has also suggested that learning platforms can help students access quality education remotely during times like these. With 250 million school-going students in India, it is of paramount importance that their health be protected while also ensuring that their learning does not get interrupted.



CEO	Jessie Woolley-Wilson
FOUNDED	2006
NOTABLE CO-INVESTORS	TPG's The Rise Fund, Reed Hastings, John Doerr
WEBSITE	www.dreambox.com
HEADQUARTERS	Bellevue, Washington
FOCUS	Pre-K-8 Mathematics

COMPANY

DreamBox is the only K-8, digital math program powered by student thinking, built by and for educators, and independently proven by multiple, third-party studies to improve student achievement with just one hour per week. DreamBox dynamically adapts and differentiates for each student in real time, based not only on their answers, but also based on how they solve problems. With actionable reports of student growth for teachers, DreamBox also provides predictive insights about how students will perform on their state tests in the spring. DreamBox provides content-specific professional development, and provides administrators and parents with insights about how students are progressing.

BUSINESS MODEL

DreamBox offers districts and schools annual or multiyear licenses for tiered product bundles on a per-student basis. DreamBox also offers fee-based, professional-learning services that support schools implementing blended-learning solutions and using data to inform their practice. Parents are able to purchase home licenses for their children with monthly, six-month, annual or lifetime licenses.

CUSTOMER TESTIMONIAL

“We’ve had four years of consecutive growth in mathematics across our district. I tell anyone and everyone that will listen to me that they need to look at DreamBox.”
— Jeffrey P., Superintendent.



JESSIE WOOLLEY-WILSON

CEO

Jessie Woolley-Wilson joined DreamBox in 2010 as chair, president, and CEO. She has worked in the education technology space for nearly 20 years, to support teachers, administrators and parents to improve learning and life outcomes for students. Prior to joining DreamBox, Jessie held executive positions in leading companies, including Kaplan, LeapFrog SchoolHouse and Blackboard. Jessie holds an MBA from Harvard Business School and a B.A. from the University of Virginia.

At DreamBox, we don't believe technology replaces teachers, rather, that it serves as a complementary tool that should meet the needs of both students and learning guardians. In this unexpected time, when schools have transitioned to remote learning, DreamBox's adaptive, conceptual math curriculum still enables students to grow over 50% more than their peers in just one hour per week. Along with new, impact reporting, we're proud to have released an innovative, predictive reporting capability. DreamBox Predictive Insights lets teachers know how students will perform on their spring state test, providing actionable data without losing instructional time to additional testing.

– Jessie Woolley-Wilson, CEO

PAIN

Student achievement in mathematics is still far from where it needs to be, and our instructional practices need to improve so that students have both competence and confidence in math. Therefore, students need to make sense of math concepts for themselves, and not experience math as if it were a spectator sport. And they need real-time support and personalized learning pathways so they can activate their prior knowledge and develop confidence as young mathematicians. Educators not only need curricular resources that have been independently proven to improve student achievement, but they also need relevant, real-time growth data and predictive insights to help simplify differentiation for a wide range of learners in their classroom.

SOLUTION

DreamBox Learning developed an Intelligent Adaptive Learning™ technology, and combined it with a rigorous, K-8 math curriculum, as well as an engaging game-like environment that enables self-directed, empowering and

fun learning experiences for students. Instead of a “sit and get” math curriculum, DreamBox immerses students in “think and do” experiences so they can make sense of math concepts in ways that are only possible within a digital environment. DreamBox provides educators with relevant information about student progress, predictive insights that are 85% accurate about how students will perform on their state tests, and professional-learning services, delivered in person, or on demand. To support home-school connections, parents also have access to insights about their child's growth.

RECOMMENDED PRODUCT USAGE

Students should complete at least five lessons per week, which can be accomplished in about an hour (usually across two or three sessions). Students who complete five or more lessons per week grow 50% more than their peers. Teachers typically access their dashboard once per week to monitor progress and make targeted assignments that align with classroom goals.



DREAMBOX BY THE NUMBERS

USAGE

45m+

Hours spent on Dreambox during the 2019-2020 school year

3.3

Lessons completed per student, per week

REACH

5.2m+

Users

5m+

Students

200k+

Teachers

50

States

3

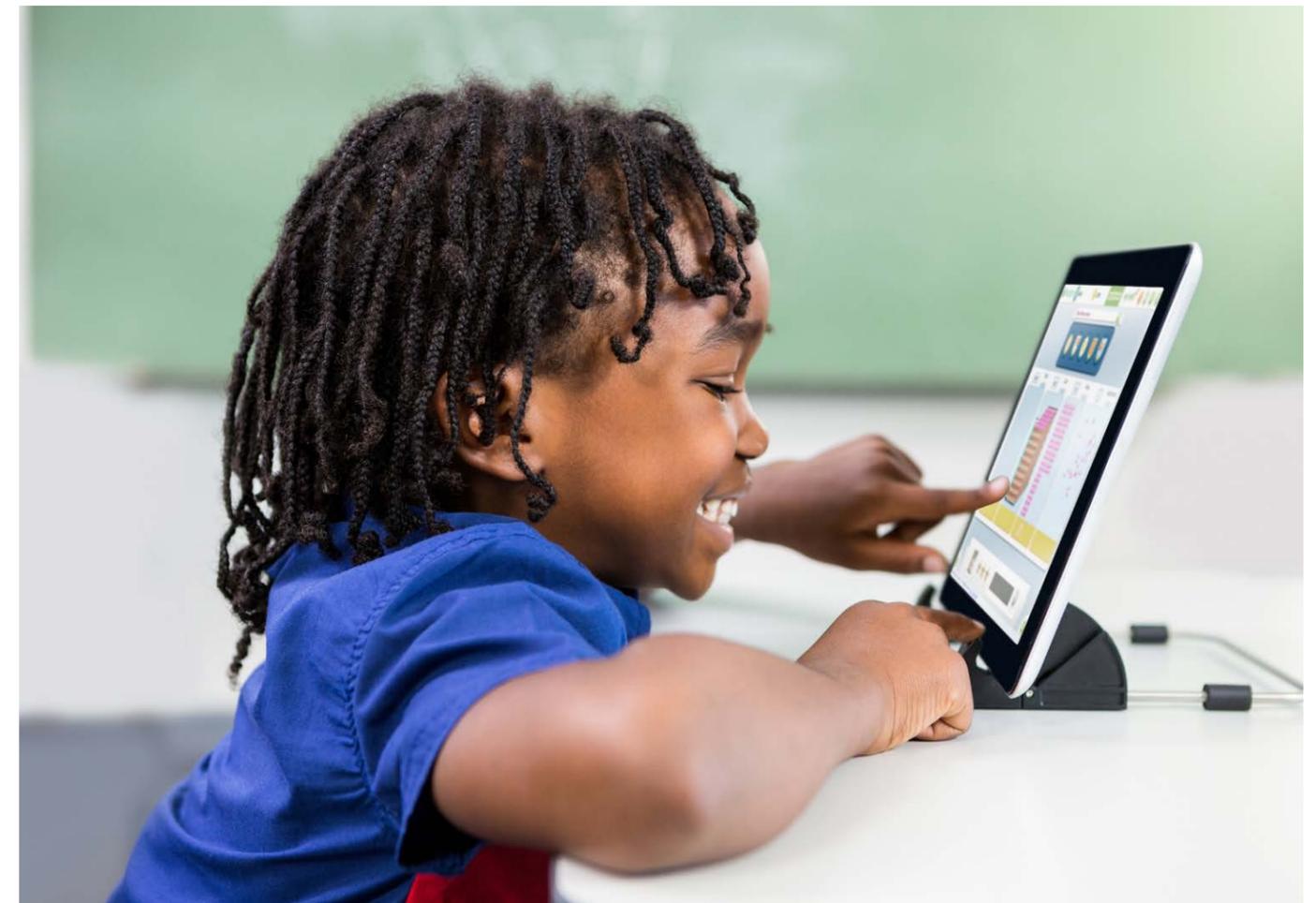
Countries: United States, Canada and Mexico.

PRODUCT OUTCOMES

OUTCOME 1: IMPROVE STUDENT ACHIEVEMENT IN K-8 MATHEMATICS

DESCRIPTION: Ensure that students who complete the recommended, five DreamBox lessons per week (requires about one hour) during the school year will improve their growth by at least **50%** more than they would have without DreamBox (equivalent to roughly 1.5 grade levels, no matter whether they start below, at, or above grade level).

Metric: During the 2019-20 school year, students who completed an average of five or more DreamBox lessons per week grew an average of **1.9 grade levels**, as calibrated with external, third-party assessments.



1 NORTH DAKOTA SCHOOLS BOOST MATH SCORES WITH DREAMBOX

Bismarck Public School District

The Bismarck Public School District — located in Bismarck, North Dakota — is a notably high-achieving district. Average daily attendance for its 13,312 students was 96%. Twenty percent of its grade-10 to grade-12 students are members of the National Honor Society, and 85% of seniors score at the 85th percentile or higher on a national achievement test.

But, like a lot of districts, Bismarck schools cater to a wide range of students of different socioeconomic backgrounds. And while some of its schools are large, others are small and retain some of Bismarck's once-rural flavor. So, to help all students achieve more — especially in the critical early years of math instruction — the district adopted DreamBox as an important, new instructional tool. The district was impressed with its ability to provide differentiated instruction to its varying student needs and believed it had found a tool that would provide uniform math instruction in grades K-8.

Bismarck was searching for an integrated solution for the entire school district, from grades K-8. Initially, it began with a four-school pilot (two high schools and two middle schools), inviting principals from other schools to review DreamBox's impact on student learning and growth during the quarterly review cycles. After a successful pilot, the middle schools and high schools in Bismarck signed a four-year commitment with DreamBox to expand the offering across the entire district. The district found DreamBox to be incredibly effective in increasing student achievement for every student — SPED, T1-3 Intervention, and EL; and provided a way to put their NWEA RIT scores into action.

Within a year, DreamBox had expanded its presence to encompass all elementary schools in addition to the middle school and high school programs.

“It was a word-of-mouth thing,” says Nicole Szajkowski, an instructional designer with Bismarck schools. “A pilot that

we ran went very well, and after that, teachers and parents were calling me and asking, ‘How do we get DreamBox?’ Then every school decided to purchase it.”

Implementing DreamBox within the schools' existing math curriculum was a carefully thought-out process. Teachers and instructional leaders such as Szajkowski met to talk about fitting DreamBox into math classes, how to help students get the most of DreamBox, and how to use data gleaned from DreamBox to assist individual students. “With DreamBox, we could take a snapshot of students' math skills when they were in the third grade, then compare that with their skill in the fourth grade and determine the impact of DreamBox.”

To ensure teachers were as well trained as possible on DreamBox, the district invested to bring in substitute math teachers so regular teachers could spend a half day learning how to best use DreamBox. “The district really made a commitment to DreamBox,” says Szajkowski. “It was huge to give teachers the time to really dig into DreamBox more deeply.”

In practice, some teachers use DreamBox as a station-rotation model in which students take turns using it. But many teachers have found more success setting aside time to do DreamBox as a full-class group. If computers aren't readily available, teachers share computers with another class, or use a building computer-cart checkout.

Now that DreamBox is aligned with the Investigations 3 Common Core Math Program, many teachers are also using DreamBox's AssignFocus feature, in which lessons are assigned that go along with what they are teaching in the classroom.

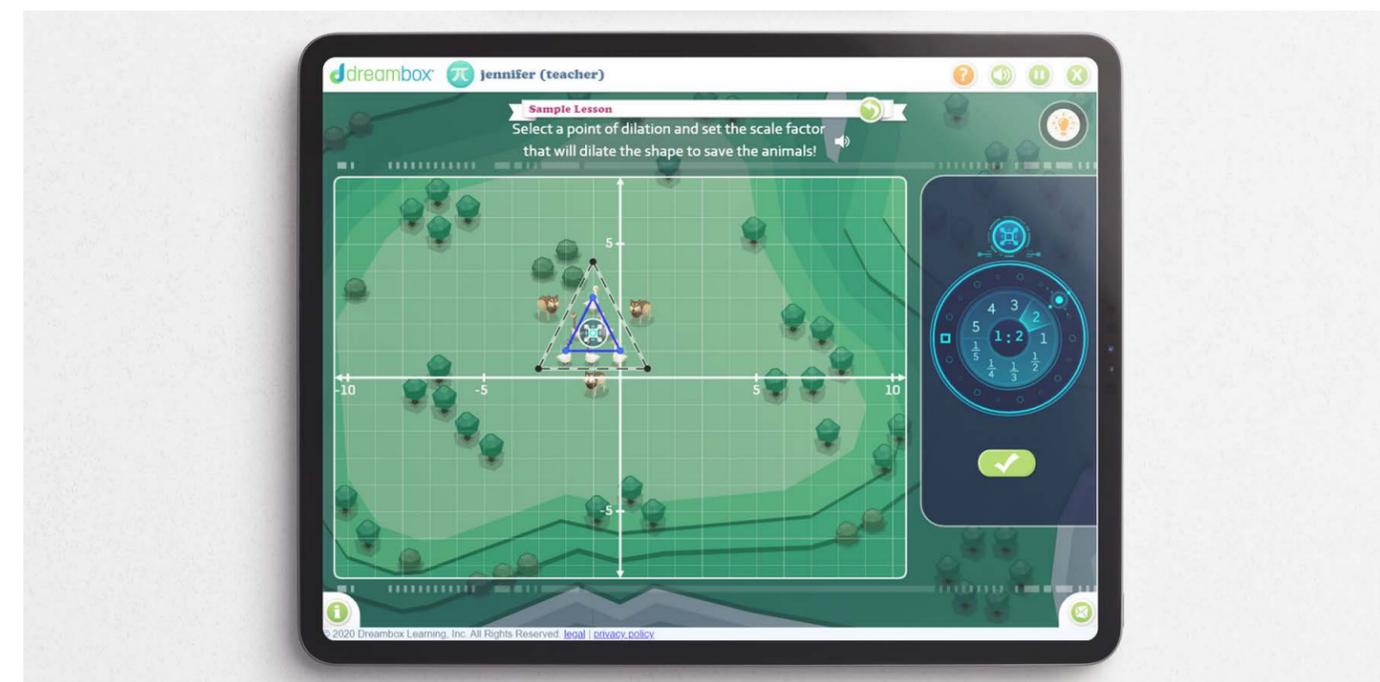
For students, DreamBox creates a fun way to approach the challenge of mathematics. They feel like they're playing a game when in fact the program is helping them master critical math skills, such as division, multiplication, and

fractions. Plus, because DreamBox works across multiple devices, students can continue working with DreamBox on their home devices. This drives deeper student engagement as well as greater participation and interest on the part of parents.

Better yet, DreamBox has led to measurable improvements in math scores. Average student growth has an additional 60% to 70% over growth norms, with 100% growth across every grade level. Some grades saw average growth increase from 8 points to 24 points.

The success Bismarck's schools have seen with DreamBox has encouraged the school district to embed DreamBox more deeply into its math curriculum.

“Overall, Bismarck Public Schools has been very pleased with the growth and conceptual work DreamBox provides. We're excited to see what growth, vocabulary and understanding comes, as kids have DreamBox for a few consecutive years.” — Nicole Szajkowski instructional designer, Bismarck Public School District.



2 STAYING THE COURSE: DREAMBOX LEARNING CEO, JESSIE WOOLLEY-WILSON, ON WHY ED-TECH IS FINALLY HERE TO STAY

In early March, 2020, DreamBox Learning CEO, Jessie Woolley-Wilson, could point proudly to the growth of the online math company. In the last nine years, since the startup pivoted from consumer sales to school licensing, some 3 million students had benefited from DreamBox's adaptive learning technology and its colorful video-game-style math lessons. Five weeks later — with an estimated 124,000 of the country's K-12 schools closed to prevent the spread of coronavirus — the number of students using DreamBox jumped to nearly 5 million.

“We knew we would grow,” Woolley-Wilson says of her 2020 outlook. “We knew we would grow fast. But you never think you will triple your website traffic.”

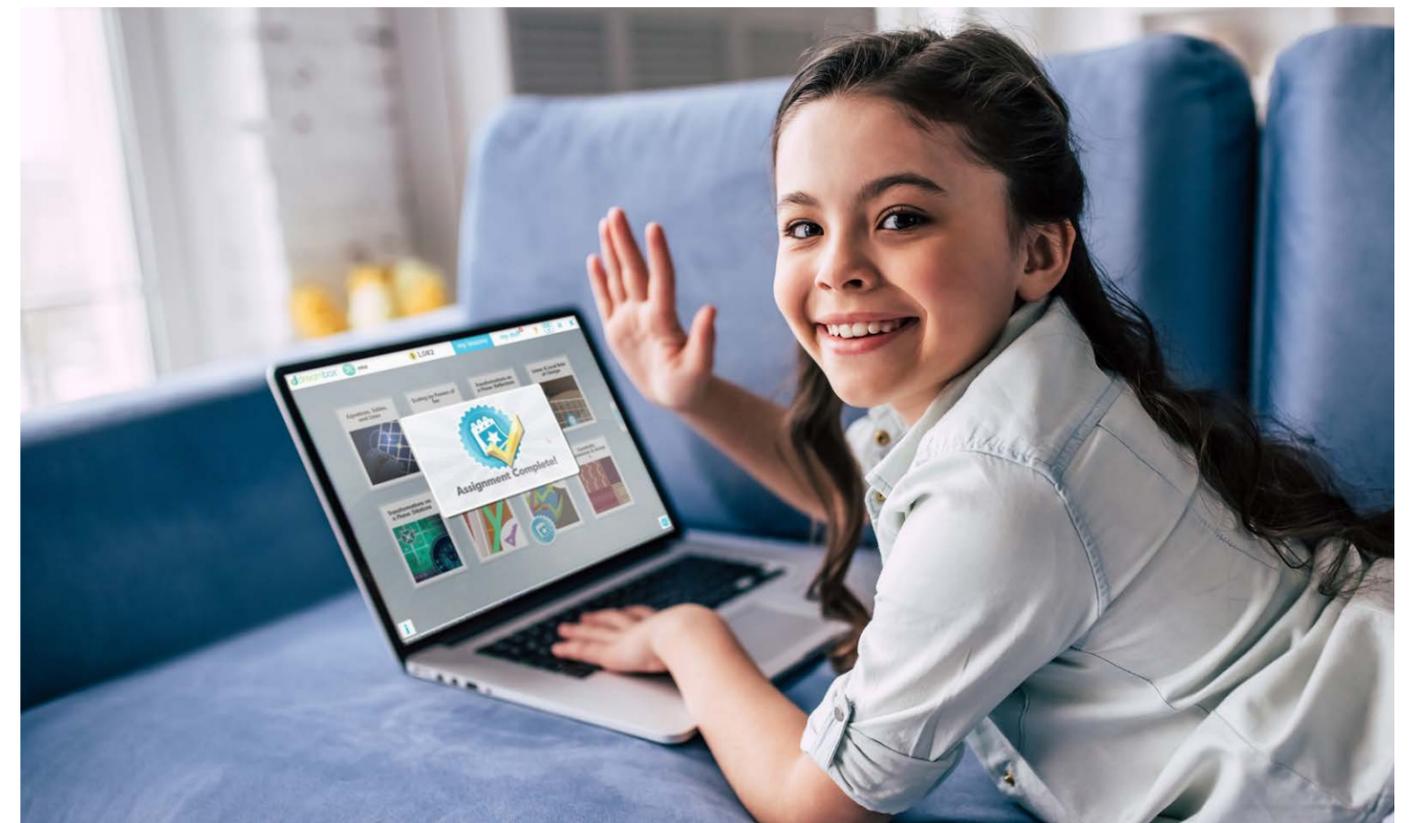
For the education-technology sector, the restrictions to traditional in-person schooling imposed by state stay-at-home orders presented opportunities amid countless obstacles. The sale of ed-tech products has been on the rise in recent years — with an estimated \$150 billion in global expenditures on digital learning in 2018, a number predicted, pre pandemic, to double by 2025 — but classroom usage has not been as robust. A 2018 report by education data company, BrightBytes, found that an estimated 30% of ed-tech licenses that schools purchased were never used in the classroom, and nearly 98% weren't used “intensely” — that is, students got less than 10 hours of instruction with the technology between assessments, limiting a product's effectiveness.

When using Dreambox, first-graders can learn pattern recognition from colorful cartoon pirates, third-graders are quizzed on fractions by adorable aliens, and seventh-graders go under the sea to understand graphing. The program reshapes the lessons in real time in response to a student's progress. The approach appears effective. A 2016 report from the Harvard University Center for Education Policy Research found that students who spent more time on DreamBox and followed its recommended curriculum saw larger and faster gains in math knowledge — as much as 7.5 percentile points on a standardized test — than those who did not. The challenge for the CEO was ramping up access to the platform as the country began to shut down while her own office was struggling with the same type of workplace disruptions all companies have faced.

DreamBox, which is based in metropolitan Seattle, the epicenter of the first-known U.S. outbreak of COVID-19, was among the first wave of companies to transition to a fully work-from-home model. For Woolley-Wilson, keeping the DreamBox employees safe was a necessary first step in meeting the increasing demand for online educational tools.

The newly remote, DreamBox team decided to shift its focus to support, providing customer service, not just for the 130,000 educators who had been in their network at the start of 2020, but to thousands of new school clients. Because DreamBox also decided to reinvigorate its consumer focus, making the company's 2,300 math lessons available for free to individuals through the end of the school year, it also fielded questions from the tens of thousands of caretakers concerned about their children's learning needs. **Within a week of launching a 90-day free trial, subscriptions grew by 3,600%.** In addition, the company accelerated the release of a new product, originally designed for classroom instructors and now geared to administrators. The recently debuted, DreamBox Predictive Insights is a data dashboard that helps school districts — many of which had cancelled assessment testing — to predict year-end math proficiency and to better plan for post-pandemic instruction.

Woolley-Wilson believes that ed-tech products that prove to be useful during the pandemic will have a new, enlarged role to play as stay-at-home orders are lifted. Although the onus for education — and therefore, the biggest opportunity for ed-tech sales — will largely shift back to the schools, she expects caretakers will remain more engaged in the process. “Blended learning” — software that supplements in-person education and can be used remotely — “used to be a nice-to-have,” Woolley-Wilson says. “I think it is going to be a must-have, going forward. We really don't know what school is going to look like when they go back.”





CEO	Josh Golomb
FOUNDED	2015
NOTABLE CO-INVESTORS	Bain Capital Ventures, UCSF, Centene Corporation
WEBSITE	www.hazel.co
HEADQUARTERS	San Francisco, California
FOCUS	School-based telemedicine

COMPANY

Hazel Health is a national, school-based telemedicine solution that uses qualified, health care professionals to deliver convenient, accessible, high-quality care to students. Delivered using Hazel’s proprietary telemedicine platform, students are able to receive same-day treatment for acute, chronic and wellness care — both at school, and at home.

BUSINESS MODEL

Hazel provides telehealth services to school districts. Students enrolled are then able to access care when, and where they need it — at school, and at home. Most services are reimbursed by health insurers, with districts supporting the cost of school-based operations and uninsured students.

CUSTOMER TESTIMONIALS

With Hazel Health providing a “coherence of service,” and developing health care as a community resource, Delhi United School District superintendent Adolfo Melara has seen a roughly 20% reduction in absenteeism in his district, and a roughly 30% reduction in students missing school to take care of chronic-care needs.

“The community has a sense of pride in what we offer,” he said, noting that Delhi USD is becoming a model for other districts thinking of launching a telehealth platform. “These parents now see us and say, ‘my child has access to high-level medical care right in the school.’”



BILL NGUYEN

Co-founder

Bill co-founded Hazel Health. Bill has a successful track record of founding innovative companies. He is dedicated to applying his experience to develop new services which better serve all students, including co-founding a public charter school in Squaw Valley, and partnering with Apple on other education initiatives.



JOSH GOLOMB

CEO

Josh brings two decades of experience bringing innovative, health care-delivery models to life. He is the CEO of Hazel Health, where he oversees all business activity. He passionately promotes the organization’s vision and mission to its many stakeholders. Prior to joining Hazel, Josh led primary-care disruptor, Paladina Health, as its CEO.



NICK WOODS

Co-founder and CTO

Nick co-founded Hazel Health, and serves as Chief Technology Officer. Nick has 25-plus years of experience innovating and managing products, including co-founding Color (acquired by Apple). Prior to that, he worked as a senior software engineer at Apple.



RAQUEL ANTUNEZ

VP of Education Markets

Raquel has over 20 years of extensive experience in the education sector, having held a multitude of leadership roles in education including school principal and director. Raquel holds a Master of Arts in Educational Administration from USC-Sacramento and brings her expertise in serving historically underserved communities to Hazel Health.

“My oldest son was born deaf. I experienced firsthand how hard it is to get health care for your kids — even when you speak the language and have insurance. It’s not that there aren’t great doctors, but the process is hard, especially for working families. Before Hazel, I ran a company that operated work-site health clinics. We found that providing convenient, accessible care increased the “right” utilization — ultimately improving health outcomes. When I heard about Hazel, “a light bulb went off.”

– Josh Golomb, CEO

PAIN

The “pain” Hazel’s product is trying to solve is student-health inequity resulting from poor health status caused by a lack of access to convenient, high-quality care.

Students succeed most when they attend school regularly, and health status has a direct, and significant impact on attendance. Students in fair-to-poor health are four times more likely to miss six-plus school days due to health reasons, compared to those in good-to-very-good health. The majority of full-day absences have also been shown to be health-related, further highlighting the importance of health in educational attainment.

As of 2016, it is estimated that 20 million children in the United States still lack sufficient access to essential care (Source: Children’s Health Fund).

SOLUTION

Hazel’s solution addresses this problem by providing accessible, high-quality care to students where, and when they need it. Telehealth services are accessible directly in school — where students spend eight hours a day, 180 days per year. When school is not in session, care is still available with Hazel’s new product: Hazel at Home.

All services are provided by fully qualified medical professionals, and are available to all students irrespective of insurance or immigration status. Ninety percent of students treated by Hazel return to class the same day, with wellness and chronic-condition management helping to reduce future absenteeism.

For parents, Hazel Health provides a way for their children to get access to healthcare in a trusted place without wait times or other barriers.

PRIMARY PRODUCT STAKEHOLDERS

School districts, parents, payers, including Medicaid and MCOs

RECOMMENDED PRODUCT USAGE

On-demand use of Hazel’s telehealth platform provides the intended outcomes for users.

HAZEL HEALTH BY THE NUMBERS

USAGE

700

Discharges per week

650

SMS sent per week

90%

Students returning to class

REACH

140k+

Students

99

Schools

14

Districts

7

States

ACCESS

67%

Free-reduced lunch students

74%

Title I schools

13%

English language learners

80%

Students of color

56%

Latinx

20%

White

15%

Black

5%

Asian

3%

Two or more races

1%

Hawaiian

PRODUCT OUTCOMES

OUTCOME 1: REDUCE NUMBER OF STUDENTS WHO ARE CHRONICALLY ABSENT

DESCRIPTION: Relative (year-over-year) decrease in percentage of students in K-8 who are absent 10% or more of the instructional days they were enrolled.

Metrics: In 2018-2019: Relative increase in year-over-year chronic absenteeism of **1.1%** for all of California, compared to a **1.6%** relative decrease in the rate for schools partnered with Hazel for at least one year.

Over a span of two years, relative increase in year-over-year chronic absenteeism of **1.4%** for all of California, compared to a **2.9%** relative decrease in the rate for schools partnered with Hazel for a cumulative two years.

Data has not been made available for the 2019-2020 time period (it may not be published at all, given the impact of COVID-19 on attendance rates).

OUTCOME 2: INCREASE FULL-DAY STUDENT ATTENDANCE

DESCRIPTION: The percentage, and count of visits where the student was able to return to class the same day after a Hazel visit.

Metrics: **90%** of visits; **15,136** student visits to date.

OUTCOME 3: INCREASE TOTAL STUDENT INSTRUCTIONAL HOURS ATTENDED

DESCRIPTION: The number of instructional hours “not missed” by a student because they were able to get care at school, compared to a traditional ambulatory care office.

Metrics: An average, ambulatory-care office visit takes **128** minutes, as estimated by a national study. A Hazel Health visit takes an average of **14** minutes. As of the 2019-2020 school year, Hazel Health has helped students attend **32,406** instructional hours.



1 HAZEL AT HOME

Prior to the pandemic, Hazel delivered its telehealth services directly to students while at school. However, with school closures from COVID-19, Hazel was no longer able to provide access to the healthcare services that many students and families rely on.

To address this problem, we borrowed from what many educators had already started doing to continue teaching by using remote learning. Specifically, we developed and launched Hazel at Home: An extension of our core service offering that provides students or parents seamless access to our telehealth services outside of school.

The majority of initial visits through Hazel at Home have been with families already familiar with our school-based services. Many of these families routinely experience barriers to accessing care, which have only been exacerbated further by the pandemic. The benefit and positive impact on health outcomes that Hazel at Home could have for these families and others came from one of these early visits.

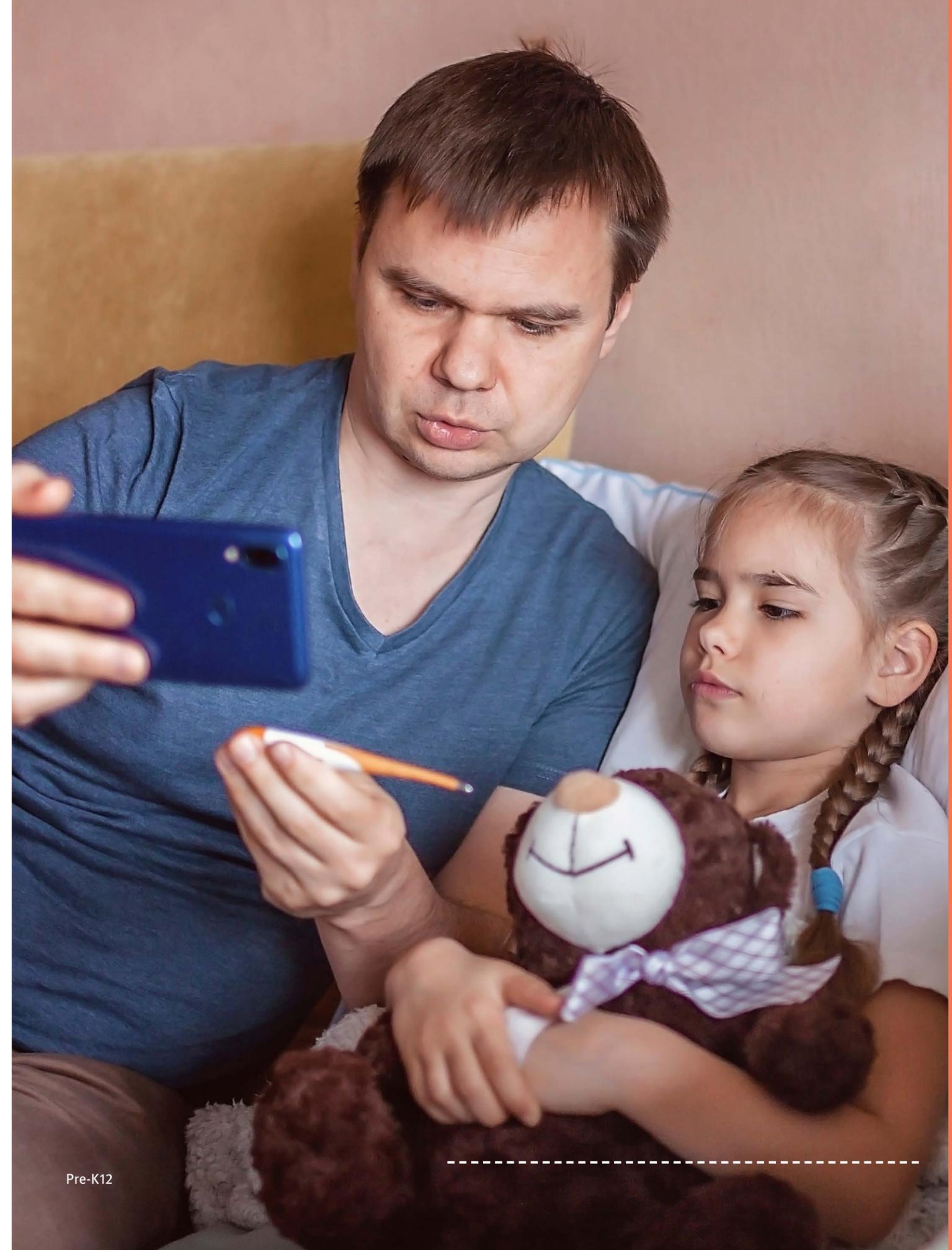
A mother, whose eight-year-old son had previously used Hazel at school for an injury at recess, was concerned about “growing pains” that didn’t seem to be getting better. She had been reluctant to leave their house during the pandemic, but was comfortable using Hazel at Home because of the trust and familiarity she and her son had already established with Hazel.

After an initial assessment over the phone with the mother, the Hazel provider determined that the concern was more than a “mild problem.” The child had lost 15 pounds over a three-month period, and the symptoms were inconsistent with “growing pains.” She had the mother take pictures of his legs and send them to her through the Hazel at Home app. After reviewing the pictures, the Hazel provider recommended that the mother seek immediate medical attention with their primary care provider.

The soonest their provider would be able to get in to see their doctor was 48 hours, so the Hazel provider urged them to go to the emergency room. The mother, who is an essential worker, was afraid of losing her job, and was

hesitant to go — she was also concerned that she wouldn’t be able to share the complete health history in detail at the ER. Hazel committed to faxing a detailed history, and Hazel’s Chief Medical Officer offered to reach out to the ER ahead of time. Because of the trusted relationship that Hazel had established with the family, the mother made the decision to go to the ER.

The Hazel provider called the mother the next day to follow up on her son’s health status, and learned that he had been diagnosed with leukemia. Treatment was able to start immediately. The mother expressed to Hazel her gratitude for the care her son was able to receive through Hazel at Home. Had it not been for Hazel, she would not have sought immediate medical attention.



2 THE PIVOTAL ROLE OF TELE-MEDICINE DURING COVID-19

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

Prior to the pandemic, Hazel delivered its telehealth services directly to students while at school. This provided Hazel an opportunity to positively impact student health, eight hours per day, 180 days per year. However, with school closures from COVID-19, Hazel was no longer able to provide access to the health care services that many students and families rely on.

To address this problem, we borrowed from what many educators had already started doing to continue teaching by using remote learning. Specifically, we developed and launched Hazel at Home: An extension of our core service offering, that provides students or parents seamless access to our telehealth services outside of school.

Our goal is to be able to provide convenient access to high-quality care for students when, and where it's needed.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Absolutely. We see two main changes to the needs of our users as a result of COVID-19:

1. Users (students) want or need to be able to access health care services when, and where they are needed. We had always planned to make our platform available to students at home, and COVID-19 dramatically accelerated the need for us to do so. Our new product extension, Hazel at Home, provides students the same health care quality and convenience as our school-based service. We hope it provides the care so many students need right now.
2. Districts have a much higher focus on ensuring student "health and safety," compared to before the pandemic. There is still a lot of uncertainty around COVID-19, and what that means for back-to-school in the fall as it relates to health. There is a lot of new interest in Hazel coming from new districts that are looking to expand their existing health services. And for our existing partners, we're finding that we are well positioned to help support their back-to-school strategy, both in terms of being thought partners, and the services we can provide to their students.

Could you provide a couple of examples of the early impact that you're seeing as a result of your COVID-19 efforts?

Early impact from our COVID-19 efforts has been encouraging, with really strong interest and engagement from our stakeholders (districts, parents and payers) for our new Hazel at Home product.

While there has been an increase in demand for school-based telehealth centers, we are finding that districts are now looking for a more comprehensive solution (compared to before the pandemic). They want a solution that their students can seamlessly access, whether they're learning at school, or at home. Hazel at Home has helped meet that need, and we have seen an increase in the number of new partnerships, including two of the country's largest school districts, and greater adoption of our solution in existing districts.

In districts and schools where Hazel at Home is now available, we are seeing solid utilization of the product. Although it is still early in the rollout, we have been able to have a really positive impact on health outcomes for students and parents that have had visits. Their feedback about the product has also been helpful, allowing us to quickly adapt it to be more user friendly for the fall.

Lastly, there has been a lot of positive momentum, with health-insurance payers wanting to cover Hazel services for their members. We have always had good interest from them; our expanded platform has definitely increased their engagement and support.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

From a Hazel perspective, we would say that the pandemic has highlighted, on a broad scale, the importance of health toward achieving educational outcomes, and how technologies like telehealth can be used to positively support both.



CEO Ahsan Rizvi
FOUNDED 2015
NOTABLE CO-INVESTORS Khosla Ventures
WEBSITE www.kiddom.co
HEADQUARTERS San Francisco, California
FOCUS K-12 classroom OS

COMPANY

Kiddom builds technologies that enable teachers and learners to unlock their full potential. Teachers are often constrained by limited access to quality tools, or mandated use of ineffective tools that do not meet their students' needs. We believe technology should be utilized to close the achievement gap and level the playing field for all students.

BUSINESS MODEL

Kiddom sells licenses to schools and districts on a per-student basis.

CUSTOMER TESTIMONIAL

"I got to use Kiddom virtually as the pandemic hit in spring, 2020, and it has been great. The usability of the platform made it really easy for our district to transition to virtual learning, and not skipping a beat."

— Melanie Gillingham, seventh-grade math teacher at Cougar Mountain Middle School (a Bethel Independent School District school).



AHSAN RIZVI

CEO and Co-founder

Ahsan has experience both as an entrepreneur, and in K-12 schools. Prior to founding Kiddom, Ahsan had co-founded Le Sensor, an apparel startup (which was acquired in 2011). He had also worked for the Mountain View School District, helping to deploy Google Chromebooks across the district. He began his career at the Overseas Private Investment Corporation, focusing on education investments.



ABBAS MANJEE

Chief Academic Officer

Abbas has deep education experience. He was the founding math teacher at ROADS Charter School in the Bronx. He had also served as the founding math teacher at a New York City public school which was focused on high-risk youth. Abbas began his career as an investment-banking analyst at Merrill Lynch.

PAIN

Teachers lack access to tools that integrate each step of their teaching process, with the result that many use piecemeal solutions to meet the needs of their students. Additionally, school and district administrators have no visibility into what is being used in classrooms and what resources have the most impact on student learning. This causes fragmentation of student academic data into multiple silos, and no stakeholder has a complete understanding of student achievement.

SOLUTION

Kiddom is built on the premise that school districts need one system, to manage curriculum and content from all publishers, to enable teaching through digital workflows, and to gather all academic data to understand how students are doing in real time. Kiddom believes that this system is the key to unlocking innovation in schools and districts across the United States.

PRIMARY STAKEHOLDERS

Teachers, students and administrators (both at school and district levels)

RECOMMENDED PRODUCT USAGE

Teachers engage with students by sharing assignments.

“Kiddom’s mission is to unlock potential for all teachers and learners. With our collaborative platform, we’re excited to get one step closer to a world where more teachers have time to connect with, and inspire students, no matter where they are.”

– Ahsan Rizvi, CEO and Co-founder



1 KIDDOM ECO CHARTER SCHOOL

School Demographics and Context.

The Environment Community Opportunity Charter School is an independent charter school, serving the Camden, New Jersey community. ECO opened its doors in September, 2005.

Located in Camden's central business district and education corridor, ECO educates 274 students, in kindergarten through eighth grade.

Student demographics breakdown:

- ~85% FRL students
- ~60% Black
- ~40% Latinx

ECO is a school rooted in environmental science and service learning. It employs technology in an intentional and regular way with students and teachers. It offers a one-to-one, tech environment, with Chromebooks provided to all students. The school features multiple computer labs, and some access to iPads.

School vision and motivation to adopt Kiddom.

ECO was founded in 2005 by Antoinette C. Dentler. She is a widely respected educator, and is well known for her personal dedication to students, teachers, staff and the community. Dr. Dentler serves as a mentor, leader, motivator, advocate and visionary. She has been at ECO's helm since its inception. She started ECO with a vision: To both increase academic achievement in urban communities, and encourage interest in environmental fields. Her progressive approach to education, and her strong belief in equity — that all students have the potential to succeed in life — make ECO into a positive and successful educational environment.

For its first 12 years, ECO was a K-5 school. It recently

expanded to include a middle school as well, due to intense, family demand. The 2019-20 school year is the first year it has had an eighth-grade class.

Implementation and rollout.

The ECO leadership team was very pleased with EL Education's English-curriculum model and it wanted to find similar offerings across content areas. It was already using Eureka Math for K-5, and it was seeking an innovative, middle school math curriculum. It decided upon Open Up Resources 6-8 Math Curriculum for middle school.

When the ECO leadership team learned about Open Up Resources' new partnership with Kiddom, it was excited, because it had been wanting to migrate away from print, to digital materials. This was driven in large part by a desire to conduct regular and rigorous data reviews among teachers and students; and the ECO team wanted a platform that could enable it to store its curriculum and student-mastery data in one place. This is also aligned with its mission to be environmental stewards.

It decided to implement Kiddom as a grade book, and for access to the curriculum. Kiddom's vetted, K-12 content library of supplemental materials was also a strong selling point.

Kiddom's Customer Success team visited ECO in the fall of 2019 to provide an introduction to Kiddom for its faculty academy. It met with teachers in small groups and demonstrated how the platform could be used for teaching and learning.

The plan (pre-COVID 19) for the 2020-21 school year was: The sixth- through eighth-grade teams would be mandated to go digital and to conduct their teaching entirely through the Kiddom platform according to a milestone system, with deadlines for entering grades into the Kiddom gradebook. Students would also be required to complete their assignments and access their instructional materials via Kiddom. The third- to fifth-grade teams won't be mandated, but will be using the platform as well. In order to make this happen, Kiddom needed to get EL fully operationalized.

What worked well or supported teaching and learning.

The ECO team is thrilled with the support it receives from the Kiddom team, in particular, from Ross and Abbas. According to Desarmes, "We've had superb communication with the Kiddom team. It is much better than with other tech companies. It is open to taking input and customizing the product for ECO."

The training rollout also worked very well. In particular, for new teachers, Kiddom's live, professional-development sessions are great. It was key to demonstrating a true partnership between Kiddom and ECO. The regular, ongoing PD (beginning-, middle- and end-of-year sessions) fostered this. "We are doing this together, and we feel a commitment," said Desarmes. ECO is very selective about whom it partners with, and it values highly honesty, transparency and access to Kiddom leadership. It seeks partners who share those values.

Next steps.

ECO recently conveyed its plan to fully implement Kiddom and OUR for next year across grades three to eight, which is great news.



2 KIDDOM'S CEO REFLECTING ON COVID-19

How would you say that COVID-19 has impacted the ed-tech landscape?

The pandemic has accelerated the need for distance-learning tools, since it is unlikely that teachers and students are going to be physically present in classrooms in the fall semester. Additionally, this situation will persist through 2020 and 2021 as the pandemic ebbs and flows, making it improbable that we will have a consistent, 180 days of teaching and learning in classrooms for the next two academic years. Given the reality, it is important for schools and districts to build plans for remote instruction as part of daily teaching and learning.

As the pandemic grew in scale in spring of 2020, schools and districts tried to switch to remote learning, but without much success. There are quite a few reasons for the unsuccessful switch, including:

- The haphazard implementation of tools within an extremely short timespan.
- The challenges around equitably distributing access (to hardware, software and the internet).
- The fragmentation of the market for software tools used for distance learning.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

At Kiddom, we are not in the position to affect how schools procure and equitably distribute hardware. However, we are in a position to affect the software they use, and how it works in a distance-learning reality. In the current scenario, communication between teachers and students will be dispersed — across a plethora of chat services, learning-management systems, and videoconferencing tools — as districts procure, instrument and implement each of those services separately. We can help schools solve this problem of the fragmentation of communication and collaboration across myriad, disconnected services.

In our view, the ideal distance-learning platform would increase connectivity, but decrease the burdens of when, how and where that connection happens. It would provide a seamless transition into digital classrooms, where teachers can have those one-to-one conversations and short chats with students, while also providing teachers with a space to do group instruction. It would provide them with spaces to run their classrooms in their entirety — all, in one place.

Kiddom enables school districts to simplify their toolsets, so teachers can teach and students can learn — from anywhere, and at any time.

Do you think the needs of your users have changed as a result of COVID? How so and how is that impacting you?

The more tools that are added to the teacher's toolkit, the harder it is to make the switch to distance learning. This further increases the likelihood that students will be disengaged, lost, and checked out. This, in turn, has a "domino effect" on families, as classrooms lean on parents to mediate the teaching relationship. It is also unfair to assume that students are going to be comfortable using the same communication tools that are used by adults, as they go back to their classrooms digitally in the fall. Those tools were never built for teaching and learning and, at best, provide a disconnected experience for teachers.





CEO

Ying Mao (“Marvin”)

FOUNDED

2014

NOTABLE CO-INVESTORS

New Oriental Education & Technology Group, Morningside Capital, LightSpeed (China), Bluerun Ventures

WEBSITE

www.leleketang.com

HEADQUARTERS

Beijing, China

FOCUS

K-12 content and service platform

COMPANY

In 2014, Lele’s team incubated Lele Academy, and started the journey to help K-12 students in China get equal access to the best educational resources, through Lele’s online platform. Lele is the first company to create a standardized, online or offline, combined-education model, wherein the key learning points covered in a traditional class are condensed into bite-size, engaging, micro learning videos. Lele’s comprehensive, digital-content library covers topics ranging from history, to mathematics and science. It is paired with a gamified, adaptive-learning platform that enables personalized learning.

BUSINESS MODEL

Based on its standardized, structural, digitized and localized, K-12 content platform, the Lele Mobile learning service is available to students on a subscription-fee basis. Lele Lite (the first-ever, recorded dual-teacher software-as-a-service product in China) has empowered thousands of mom-and-pop tutoring schools in lower-tier cities and rural counties across China. Lele also opened offline centers in a number of lower-tier cities to serve as showcases for Lele Lite.

CUSTOMER TESTIMONIAL

“The tuition-refund rate is incredibly low, despite the sudden outbreak of the coronavirus. The Lele Cloud Classroom system has provided an extremely interactive and engaging studying environment, and my students can have classes online, just like they did in the classroom.”



YING MAO (“MARVIN”)

Chairman and CEO

Ying Mao (“Marvin”) is a co-founder and CEO of Lele Academy. Before co-founding Lele, Marvin was a co-founder of PICA, the leading, wireless-instant-messaging-service operator in Greater China.

“From Day One of Lele, we are aiming to build up a future where each Chinese student can have equal access to the best educational resources. After the past six-year efforts, it seems we are getting closer to that future.”

– Ying Mao, Chairman and CEO

PAIN

There is a large “education chasm” in China. Students from approximately fifty of the most-economically-developed, first- and second-tier cities have access to high quality teachers and educational resources. However, in the 600-plus, “lower tier” cities and rural areas in China (accounting for more than 70% of all K-12 students in China), there is a severe, and chronic shortage of well-trained teachers and of resources — leading to meaningfully lower-quality education. The ongoing urbanization of China — which has resulted in over 60 million “left behind” children of migrant workers who leave their families to work in urban cities — only further exacerbates, and reinforces the inequity that exists.

SOLUTION

With Lele’s online education system, students can access top-notch content at their convenience, with Lele Mobile; teachers in public and private schools can more effectively prepare for their classes, with Lele Teacher; and the half-million, mom-and-pop tutoring centers in China can have the best virtual teachers to help teach their students,

with Lele Lite. While Lele is accessible to all students and teachers in China, its solutions are particularly valuable — and game-changing — for those that live in lower-tier cities and in rural areas.

PRIMARY STAKEHOLDERS

Students

RECOMMENDED PRODUCT USAGE

Today, Lele is laser-focused on helping students to improve their test scores. Lele does this by mining data and content from the last 10 years of national- and local-exam papers in all subjects (math, literature, chemistry, physics and English) with a goal to provide students with the most-important and relevant content. To complement its content, Lele has also incorporated assessment questions, adaptive learning technologies, and gamification into its premium offerings, to deliver an engaging and effective learning experience to students. Lele actively harvests data (from student responses to assessment questions in Lele’s system) to measure the performance and improvement of each and every student as they progress through the curriculum.



LELE KETANG BY THE NUMBERS

USAGE

200m

Learning hours

REACH

30m+

Students

110k+

Teachers

30

Provinces

283

Cities

1266

Counties

PRODUCT OUTCOMES

OUTCOME 1: 90% RETENTION FOR STUDENTS IN LELE'S OFFLINE CENTERS

OUTCOME 2: 95% OF STUDENTS FROM LELE'S PARTNERSHIP TUTORING SCHOOLS SAW SCORE IMPROVEMENT IN THEIR EXAMS



1 WHAT HAS LELE KETANG DONE TO SUSTAIN PARTNERSHIP SCHOOLS DURING THE COVID-19 PANDEMIC?

The context:

Anyang Flyingbird Education, Ltd., the largest tutoring chain (with 30 tutoring centers in Anyang, a fourth-tier city in Henan province in China), has been a partnership school of Lele Lite (Lele's recorded, dual-teacher, SaaS offering for tutoring schools) since early 2019.

Before applying to Lele Lite, Li Fei had opened four campuses, but he was not successful in running his school. As in many other towns in rural areas in China, the average income of the residents is very low (usually, around RMB 2,000 a month). Many children are raised by grandparents, as their parents work in cities. Li Fei, himself, had graduated from a second-tier college in Shanghai and had returned to his hometown. However, it was very difficult for him to find other, full-time, qualified teachers willing to stay in small towns. Consequently, 90% of students achieved no score improvement on their exams; many left Li Fei's tutoring school after only one semester.

On the verge of closing his business, Li Fei chose Lele Lite after carefully selecting and comparing education-solution providers. Li Fei was impressed by Lele's standardized, structured and localized teaching platform. Lele's teaching method is standardized, making it possible for rapid expansion. Meanwhile, it is also very localized and personalized, leading to remarkable improvement in students' exam scores.

After adopting Lele Lite, Mr. Li saw a dramatic improvement in outcomes, with 95% of students in his school reporting an average score improvement of 10% in every subject.

Students who studied at Flyingbird, on average, scored 20% higher than their peers. He no longer had to worry about the availability of qualified teachers, because Lele

Lite took care of students' need for high-quality instruction and, by the end of 2019, he was able to expand his tutoring business from four locations to 30 locations.

The challenge of the COVID-19 pandemic.

In early 2020, Li Fei faced an unexpected challenge: None of his 30 tutoring centers could open due to the outbreak of COVID-19, and students were asking for tuition refunds. "Moving the classes from offline to online was the only choice for me," he remarked.

Lucky for him, right after the outbreak, Lele Ketang launched Lele Cloud Classroom, which is aimed to help tutoring schools like Flyingbird Education to utilize the online training of Lele Lite. However, he was worried about whether students could accept the online way of teaching, and whether learning effectiveness would be affected due to lack of face-to-face supervision.

As an experiment, Li Fei entered an English class in one of his tutoring centers under an assumed name, "Li Xiaofei." Coincidentally, the teacher was using Lele Cloud Classroom. He was able to see firsthand how Lele Cloud Classroom solved the problems of "supervision, feedback, interaction and atmosphere" in online teaching. He noticed its various functional interfaces:

- Students' pictures can be played in rotation, and they can answer questions when nominated by the teacher.
- When students perform well, they get incentives, such as "Activity Points" from the teacher, or "Likes" from other students.
- If they can't understand a specific knowledge point, students can also click a button, and the system will

analyze the response, and let the teacher know that they need to improve the teaching method.

Implementation and results.

Li Fei decided to implement Lele Cloud Classroom, and he quickly noticed the positive impact. While nearly 12,000 educational institutions had to shut down as a result of the pandemic, Li Fei's 30 tutoring centers not only avoided bankruptcy, but were able to pivot to online courses, due, in large part, to Lele Cloud Classroom. Li Fei took his time analyzing and systematizing key development drivers, leading to a 3% tuition-refund rate, while also driving growth.

"The tuition-refund rate is incredibly low, despite the sudden outbreak of COVID-19. The Lele Cloud Classroom system has provided an extremely interactive and engaging studying environment, and my students can have classes online, just like they had in the classroom," observed Li Fei, founder of Anyang Flyingbird Education, Ltd.

Now, as public schools have reopened, Li Fei has been busy with summer enrollment. "Lele ketang not only provides me with high-quality teaching content, but also provides a stable and interactive, online teaching system to cope with the disruption caused by the COVID-19 outbreak. With Lele's support, I plan to open 300 tutoring centers in the next three years," said Li Fei.



CEO

Matthew Gross

FOUNDED

2013

NOTABLE CO-INVESTORS

TCV, Kleiner Perkins

WEBSITE

www.newsela.com

HEADQUARTERS

New York, New York

FOCUS

Leveled instructional content

COMPANY

Newsela takes authentic content from the world's most-trusted providers and turns it into learning materials that are classroom-ready.

BUSINESS MODEL

Educational content in ELA, Social Studies, Science and Social Emotional Learning, sold as a Software as a Service product to K-12. Professional development services are also sold as individual or bundled sessions.

CUSTOMER TESTIMONIAL

“It really is so hard to put into words how Newsela has changed my teaching. It has created numerous authentic discussions that engage and encourage my kids to participate no matter their reading level.”

— Teacher.



MATTHEW GROSS

Co-founder and CEO

Matthew Gross is the co-founder and CEO of Newsela, a leading K-12 curriculum platform. He has a twenty-five-year career in education policy and practice, nonprofit and for-profit entrepreneurship, and product development and distribution. Matthew began his career as a Teach for America corps member. He taught music in the South Bronx. He holds a B.A. from Columbia University.



DAN COGAN-DREW

Co-founder and Chief Academic Officer

Dan brings twenty-plus years of experience spent working towards a more perfect union of teaching, learning and technology. Dan began his education career in Teach for America. He was the founding director of digital learning at Achievement First Public Charter Schools, where he spearheaded the integration of digital learning technologies across twenty-two schools, including flipped classrooms, mobile learning, and one-to-one computing. He holds degrees from Wesleyan University, Brown University, and Tufts University.

PAIN

Finding instructional content that is accessible to every learner, relevant and engaging, and aligned to state standards, is always challenging for educators. What’s more, during times of disruption, inflexible materials don’t translate well to distance-learning environments, and it’s challenging for teachers to stay connected with all students, and ensure that instruction is equitable for all learners.

SOLUTION

Newsela takes authentic content from the world’s most-trusted providers and turns it into learning materials that are instruction-ready — whether learning is happening in school or at home. This empowers teachers to make decisions and select the best content for their students, while giving administrators the assurance that all content is vetted and aligned to standards.

PRIMARY STAKEHOLDERS

K-12 administrators, teachers, students

RECOMMENDED PRODUCT USAGE

Teachers who use the core subject products for ELA, social studies, or science can discover content and instructional strategies that are engaging and support the standards and topics they need to teach. Students see content at the reading level that is just right for them, and every student can participate in the same discussion. Students can also practice standards-based skills and assess their content knowledge by taking the embedded assessments included on every text.

“When schools transitioned to distance learning during COVID-19, Newsela met the needs of the education communities that we serve by providing free access to our product. It was important to us that we maintain our commitment to equity and accessibility through the crisis. As we head into a challenging back-to-school season, we’ll continue publishing content across subjects and grades in a way that’s accurate, responsible and empowering to students. Our goal is to help them process the news, stay physically and mentally healthy, support the health of their families and communities and bring relevance to learning.”

– Matthew Gross, CEO and Co-founder



PRODUCT OUTCOMES

OUTCOME 1: SUPPORT ALL STUDENTS DURING DISTANCE-LEARNING SCHOOL CLOSURES

DESCRIPTION: The number of Newsela quizzes taken by students in Title 1 schools, during distance learning, and during the same period the previous year.

3.19m quizzes (March 13, 2019 to May 21, 2019)

7.51m quizzes (March 13, 2020 to May 21, 2020)

During this time, Newsela saw a **135%** increase in quizzes taken.



CASE STUDY

1 EDUCATOR SPOTLIGHT – LOUDOUN COUNTY NCES

Michelle Skelton is a middle school reading specialist from Loudoun County, Virginia. Skelton has been an active Newsela Certified Educator who has shared more than 300 assignments with her students this year. Plus, her students go to Newsela as their top independent reading source.

Skelton has won several NCEs across Loudoun County Public Schools. This large district built a force of 90 Newsela Certified Educators in just the 2019-2020 school year alone. When the schools adopted a Newsela subscription this past summer, they were determined to help ensure successful implementation and engagement.

Let's zoom in with a Q&A to look at the great work accomplished by Skelton and her students.

So, we are going to start off with a big question: Why did you become an educator?

I became a teacher so I can help my students transcend their limitations and reach their true potential.

Seeing my students realize everything they are capable of becoming, and the smile they show when they have conquered an academic or personal challenge, is so rewarding.

That's so powerful. There are so many special moments in the classroom, but sometimes it's the simple moments, like seeing a student smile, that make it all worth it. Speaking of special moments, what has been a memorable moment as a result of using Newsela?

There are many memorable and impactful moments. I value the content that Newsela shares with the students, particularly the current events. Many of my students would not ordinarily watch or read current events and instead get their information from social media. I try to choose the articles which are interesting and which would also make them more informed and empathetic citizens.

One of the memorable articles we read was called, "Tons of Plastic Food Wrappers," by National Geographic. I wanted the students to be aware of the impact we as humans can have on our environment, particularly in regards to trash and pollution. Much of the information shared were things students did not realize, such as, cigarette butts make up a large part of ocean pollution, and that cleanups were done in more than 120 countries.

Such a great article that really shows students the impact of our actions. As a reading specialist, how do you help students develop stronger reading skills?

One of the skills I am always reinforcing while working with my middle school students in small groups, for example, is the ability to locate the main idea and details in the leveled readers we use. Newsela allows me to check in the Binder to see if my students individually can transfer this skill to their independent reading practice outside our small group work. I can then take that information, whether the students have mastered the skill or still need support, and use it when they return to small groups.

Love how you really use the data insights to inform the next steps, both independent practice, and small group work. Those moments for targeted intervention are so important for student growth. OK, so now I have to ask: Since your district has so many Newsela Certified Educators, why did you choose to complete this certification?

I became an NCE this past summer via the online course, as I knew my district recently adopted Newsela for the upcoming school year. I wanted to make sure I had all the tools necessary to access the content that would help my students grow in their reading as well as in their knowledge of the world. I also wanted to be able to share this information with the other content teachers in my building and help them better connect their students with Newsela. As of December, there were two other NCEs in my school.

2 PUTNAM COUNTY, FLORIDA: A TRADITION OF HELPING THROUGH ADVERSITY

Distance-learning philosophy

Operates according to the district's long-standing mission of providing stability during times of uncertainty, with "grace, compassion and patience."

Transition challenge

Much of the district's diverse, rural student population was without access to technology or to wireless internet.

"We learn so much about our lessons through the Newsela data. Never before have we been able to have such clarity."

— Michelle Graham, secondary instructional coach.

The Putnam County School District in northeastern Florida is no stranger to supporting students through challenging times. Located in a rural section of Florida, about halfway between Orlando and Jacksonville, all schools in Putnam County receive Title I funding.

The district, which educates over 10,500 students across 26 schools, has existed for more than 150 years. In fact, Putnam County schools began their history of educating and supporting students through crisis during the Civil War.

Guided by grace, compassion, and patience.

While it's natural for instructional leaders to focus on instructional goals and learning objectives when planning a new approach to delivering education, Putnam Schools also held onto three, student-centered principles to lead their plans for school closures. These were grace, compassion and patience.

To plan for distance learning, the district quickly conducted a survey about students' needs. In response to the results, 7,200 devices were distributed to students and newly established community partnerships helped provide Wi-Fi to kids throughout the district. Impressively, nearly 200,000 meals were delivered by bus to district families in April.

When preparation for school closures began in mid-March, 2020, the district rolled out a phased plan for instruction. The director of school improvement and the director of teaching and learning worked with instructional coaches to create lesson plans for teachers during the early phases. This allowed teachers to get comfortable with distance-learning tools, and encouraged students to engage with distance-learning instruction. The subsequent phases, while still supported, promoted more instructional planning by teachers, with a continued utilization of digital tools like Newsela.

In terms of schedules for virtual learning, Putnam schools opted for a flexible approach. They encouraged asynchronous teaching, so students could do their assignments at the best time for them. Recalling the district's values of grace, compassion and patience, this policy was also considerate of the many students in the district who are sharing devices with parents or siblings.

Newfound clarity helps teachers reach all learners

Leaders in the district knew that when teachers were not physically present to offer guidance, selecting quality materials was more important than ever. As Michelle Graham, secondary instructional coach, said, the district needed content that was engaging, timely and meaningful.

Newsela helps Putnam County schools achieve this by delivering instruction content at the right level for each student. Fortunately, many students in the district were already familiar with Newsela, because many of the district's secondary classrooms were already using it to support their curriculum before the school closures.

"We learn so much about our lessons through the Newsela data. Never before have we been able to have such clarity," Graham said.

With real-time data to monitor their students' reading and engagement, teachers can communicate better with

students by providing feedback and redirection when needed. These observations will also help teachers and district leaders understand students' needs to plan for next year.

Teachers will be able to reflect on the measurable results of Newsela assignments and use those insights to adjust instruction going forward. For example, Graham noted that teachers can examine how long students spent on reading assignments and use that metric to determine if a reading passage or assignment should be used again in the future.

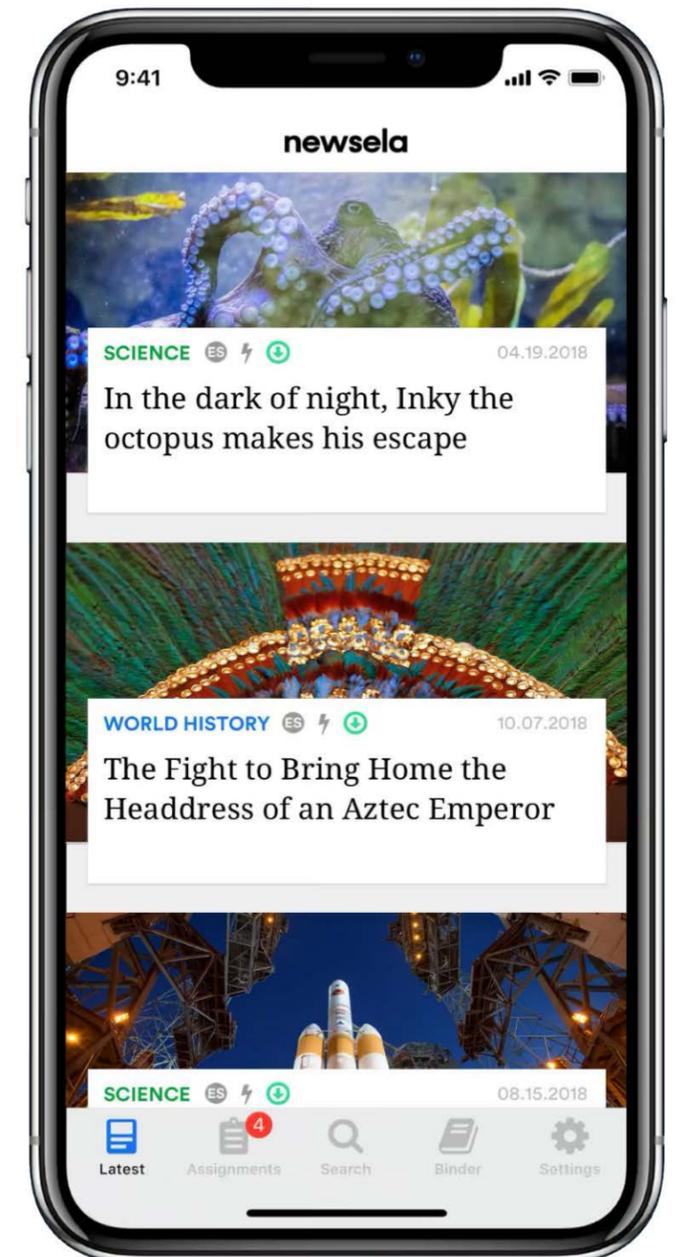
Compassionate educators provide stability throughout a crisis

Like many schools navigating unexpected closures, defining success was challenging and will continue to be an area of focus into the summer and the new school year. But without a doubt, part of the district's goal was to live up to its mission and culture of providing stability for students in challenging times, as it's been doing for over a century.

The district wants to continue to ensure that students across all achievement levels receive core instruction that leads to progress, and it wants to provide an equitable education experience for the diverse student body in this rural county.

For Graham, the experience has also highlighted the compassion that her staff has for district students.

"Never underestimate the deep love educators have for students," Graham said. "Though these times have been challenging, they've led to unprecedented collaboration among the staff in the district and they've worked hard to translate their approach to online instruction." District leadership knows nothing is as valuable as face-to-face instruction and the relationship between a student and a teacher, however, the forced shift has paved the way for new ideas and problem-solving that the district can use to better support its students going forward.





CEO

Aaron Feuer

FOUNDED

2012

NOTABLE CO-INVESTORS

Spark Capital, Emerson Collective, CZI, Google Ventures

WEBSITE

www.panoramaed.com

HEADQUARTERS

Boston, Massachusetts

FOCUS

Social-emotional learning (SEL); multi tiered system of supports (MTSS)

COMPANY

Panorama Education supports student success, in school and in life. The company helps educators collect, analyze and act on data to improve student outcomes, and equips educators and district administrators with the tools they need to build great schools. Panorama offers research-backed survey measures, advanced data dashboards and analytics, professional services, training and workshops to support multi-tiered support systems (MTSS), social-emotional learning (SEL), and school surveys.

CUSTOMER TESTIMONIAL

“As a school district, we have this goal that we want to ensure that 100% of our students are feeling loved, challenged, and prepared. We have formed this great partnership with Panorama Education. And through this partnership we administer a survey annually to identify our students’ perceptions of their lived experiences in school.”

— Dr. William Blake, Director of social-emotional learning, District of Columbia Public Schools.

BUSINESS MODEL

Panorama offers product licenses and professional-development workshops to school districts. Panorama provides research-backed surveys and MTSS toolkits to educators for free.



AARON FEUER
Co-founder and CEO

Aaron is a co-founder and CEO of Panorama Education. Aaron founded Panorama while a student at Yale University. In high school, Aaron served as the president of the California Association of Student Councils.



XAN TANNER
Co-founder and President

Xan Tanner is a co-founder and president of Panorama Education. Xan teamed up with Aaron at Yale to co-found the company.

PAIN

Across the country, a growing number of schools and districts are prioritizing social-emotional learning and tiered-support frameworks to support the whole child. Yet, these efforts are not without their challenges. For instance, in a Panorama survey conducted of more than 400 educators about the state of MTSS today, nearly 8 in 10 said that tracking tiered interventions is important — but only 3 in 10 said that their teams are tracking interventions effectively today. This data echoes what we hear from district leaders: Identifying at-risk students, creating intervention plans, and progress monitoring are manual and time consuming. And, creating a shared social-emotional learning vision and plan without data for goal-setting is a real challenge.

SOLUTION

Panorama’s tools for SEL, MTSS, and RTI streamline intervention planning and progress monitoring, so educators can effectively support every student. Panorama enables educators and interventionists to carry out the following: identify students in need of tiered support, create goal-based intervention plans, and track student progress, all in one place. Further Panorama allows

school and district leaders to do the following for their students: Equip support teams with data visibility, tools, and protocols to collaborate, gain insight into the overall district performance across academics, SEL, and equity priorities to guide planning and investment of resources.

PRIMARY STAKEHOLDERS

District leaders and educators

RECOMMENDED PRODUCT USAGE

Research-backed surveys: Understand and support each students’ social-emotional learning — the skills that are key for success in school and life — by using groups of questions from Panorama’s survey instruments to securely collect valid and reliable data from stakeholders.

Student success: Monitor every student’s progress across academics, attendance, behavior, and social-emotional learning; disaggregate data across subgroups, and compare to Panorama’s national benchmarks.

Feedback surveys: Collect reliable feedback from students, families, teachers, and staff about school climate and engagement; use the provided dedicated support, and offer training that builds data capacity.

“Since Panorama’s founding, we’ve believed that a student’s learning in school is about more than academics. I experienced this as a student growing up in the Los Angeles public-school system, and we continue to see this today in Panorama’s work with 1,500 innovative school districts across the country. Preparing students for bright futures means serving their academic, behavioral, and social-emotional needs.”

– Aaron Feuer, Co-founder and CEO



PANORAMA EDUCATION BY THE NUMBERS

REACH

10m+

Students

17k

Schools

1500

Districts

49

States

11

State agencies

PRODUCT OUTCOMES

OUTCOME 1: UNDERSTAND STUDENT PERSPECTIVES ON EQUITY AND INCLUSION IN SCHOOLS

In findings from **12,000** responses, four out of five students say that adults at school are “quite,” or “extremely” fair in how they treat people from different races, ethnicities or cultures. Students’ favorable perceptions of diversity and inclusion in school decline substantially from grades 6 to 12.

OUTCOME 2: STUDENTS’ WILLINGNESS TO ENGAGE WITH LEARNING

Students who report low engagement are more than twice as likely to be chronically absent. **60%** of chronically absent students receive failing grades, compared to **30%** of regularly attending students.



1 INTERVIEW WITH PANORAMA'S CEO – AARON FEUER

Rick: What exactly is Panorama Education's Student Success platform today?

Aaron: The bar for student success used to be graduation, but today we're seeing that students are not actually graduating from high school prepared for what comes next. Panorama Student Success and our new college- and career-readiness platform help schools make sure that students are actually on the path for college, career and life. We make it possible to see how students are doing — across math, literacy, core academics, attendance, behavior, and college-and-career-readiness on-track indicators, like credit attainment and college-readiness assessments — so educators can coordinate action to support every child. We also help schools measure the nonacademic factors that are critically important to student outcomes but that they don't have data on: Things like social-emotional learning, safety, belonging and family engagement. Today, we're proud to partner with over 900 school districts serving 10 million students. Our team of 150 is made up of people who have spent their careers as district leaders, educators, researchers, engineers and nonprofit professionals.

Rick: How does this all work in practice?

Aaron: We plug into a district's data systems, pull together their most important data on students, and if desired, we layer in social-emotional learning data from Panorama surveys. So now, teachers can have a 360-degree view of each student to understand what they need and how to help them thrive, and school and district leaders can interact with the data at a macro level to understand performance trends. Educators can also go from identifying a struggling student, to building an intervention plan right in Panorama and monitoring progress over the course of the intervention cycle. I like to point to Utah's Ogden School District as a great example of this work. In Ogden, they've formed student-support teams at every school

site that meet regularly to review Panorama data and collaborate on intervention plans.

Rick: OK, so how do you measure the impact of all of this? And how do you gauge success?

Aaron: Districts using Panorama look at impact in different ways. For some, impact might mean significantly reducing achievement gaps or improving third-grade literacy. For others, it might mean ensuring that all students are socially and emotionally competent and ready for life after high school. We work closely with our clients to define what success means in their contexts, but — no matter their goals — the main idea is, we're giving schools the tools and information to actively deliver the right support to students at the right time.

Rick: Harvard's Heather Hill has pointed out that there's little evidence that data is actually being used to improve learning, and that the evidence suggests that "data analysis" is more about figuring out which students are struggling than about helping students learn. In what ways might Panorama help on that count? Or does that really depend on the behavior of school-level staff?

Aaron: One central part of Panorama's impact is exactly that: Helping educators identify which students are struggling. We help educators look across academics, attendance, behavior and social-emotional learning to identify those students who aren't on track for success, and make sure they get the support they need. For example, if a student is at risk of failing a core class they need for graduation, we'll flag that for a counselor. Then, looking across students, we identify trends that might suggest a school needs to tackle a particular issue — for example, there's a school-safety issue, or we aren't providing students of all backgrounds equal access to AP courses.

To your point, the data doesn't necessarily identify what to do next to help a struggling student, or address a schoolwide issue. We like to say that data is only as valuable as it is actionable. Time and again, we've seen that becoming "data driven" goes way beyond having the right technology. It's really about the human side of this work — it's about shifting mindsets around data and building capacity to take action on what students are telling us and what the data shows. So, in recent years, we've been pairing Panorama's data with a strong library of resources we call, "Playbook" — we've been collecting successful practices from educators across the country, and we are working to spread those ideas. We also have a fantastic, Teaching and Learning team that travels across the country to provide professional development around what actions educators can take to help students succeed: For example, if Panorama identifies a student struggling in the Growth Mindset, what should a teacher do next?

Rick: Are there schools or systems that stand out in your mind as particularly successful illustrations of how Panorama can make a difference?

Aaron: San Bernardino City Unified School District in California is one that's near and dear to my heart. My grandfather, Mel Feuer, worked at the district for 30 years, eventually becoming a principal and leading school-integration efforts there. Today in San Bernardino, they're doing incredibly meaningful work to build a positive culture and climate for every student at every school through student- and family-feedback surveys — they see this as key to each child's growth and development, and key to academic achievement. We're honored to partner with them and to support this work.

These excerpts of an interview have been condensed and edited for clarity.

Frederick Hess is director of education policy studies at AEI and an executive editor at Education Next.

This post originally appeared in Rick Hess Straight Up.

2 HOW INDIANAPOLIS PUBLIC SCHOOLS IS KEEPING STUDENTS CONNECTED AND LEARNING AT HOME

For Indianapolis Public Schools, school closures due to COVID-19 began earlier than most — on March 13. Then, on April 2, the state of Indiana announced that school buildings would remain closed through the end of the school year.

When school closures began, so did the urgent need to set up at-home learning for its 32,000 students and 2,600 caring educators.

Ryan Werb from Panorama Education sat down with Sarah Robinson Chin, director of strategy at Indianapolis Public Schools, to talk about how IPS took swift action to ensure that students had access to devices and the internet that would keep them connected and learning at home.

Here are portions of the conversation:

Ryan Werb (Panorama): Sarah, can you take us back to the first stage of setting up home learning. What was most urgent at that moment?

Sarah Robinson Chin (IPS): When school closures began, so did the urgent need to set up home learning. We knew many students did not have access to devices and internet access at home that would allow them to connect with their teachers and classmates and continue learning. We knew we had big gaps to fill, but the challenge was to figure out who needed devices and home internet access. This was a chance for us to put our commitment to equity into action. Our students deserve a level playing field for learning and staying connected with their teachers, by video for lessons, for office hours, and for wellness check-ins.

RW: Like so many districts, you knew there was a need, but the challenge was to pinpoint which communities had the highest need for devices and Wi-Fi access. So that's when you and your team at IPS and my team at Panorama worked together to set up the Technology and Accessibility Survey to ask about technology access. Tell us about how you used the data from the Technology and Accessibility Survey to support your students.

SRC: The survey was crucial in helping us understand how many students needed a laptop and internet support. And the response was immediate: Within a week we got around **7,300** responses to the survey from families representing nearly **14,000** IPS students. We found out that **70%** of students did not have a device, and approximately **30%** did not have access to reliable, high-speed internet.

With the amazing support of our teachers, staff, and volunteers, we were then able to use phone banking to pinpoint which students needed Chromebooks and Mi-Fis. The information gathered through the Panorama survey and through these phone banks has allowed us to distribute nearly 4,000 laptops. We were also able to purchase 1,500 internet hotspots through the support of the IPS Foundation. We intentionally started with our high school students and middle school students in credit-dependent courses who need e-learning to stay on track to graduate.

We are proud of that because it means many more of our 2,600 caring educators can connect with our 32,000 students. We know that's critical for our students' ability to continue learning at home, and for our students' social and emotional well-being as well.

RW: We are living in a very new reality of rapid response. Can you talk about what that looked like for the leadership team at IPS, specifically about access to devices and Wi-Fi?

SRC: Ryan, you were a principal. You know every learning day counts. We took that very seriously in the two-week transition to home learning. We also worked with the Panorama team to get updates twice a day on the survey. We didn't wait until that survey window closed to take action. Our leadership team got twice-daily updates of new (survey) responses and we got devices out to students as quickly as we could.

“The information gathered through the Panorama survey and through these phone banks has allowed us to distribute nearly 4,000 laptops. We were also able to purchase 1,500 internet hotspots through the support of the IPS Foundation.”

Back

LEARN

1
REMAINING7
FAMILIAR ✓0
MASTERED ✓

Options



You're really hitting your str

1
REMAINING7
FAMILIAR ✓

TERM

Sun

DEFINITION

Star at the center
of the solar system

LOCATION



Press any key to continue

Quizlet

CEO

Matthew Glotzbach

FOUNDED

2007

NOTABLE CO-INVESTORS

Union Square Ventures, Costanoa Ventures, Icon Ventures, General Atlantic

WEBSITE

www.quizlet.com

HEADQUARTERS

San Francisco, California

FOCUS

Consumer Learning

COMPANY

Quizlet is a global learning platform that helps millions of people each month to practice and master whatever they are learning. Accessible via the web and mobile apps on both iOS and Android, Quizlet provides a variety of study activities and games to effectively prepare students for tests, assessments, and any other subject matter they want to learn with confidence. From flashcards and practice questions to interactive diagrams and games, Quizlet combines cognitive science and machine learning to intelligently guide students through adaptive study activities.

BUSINESS MODEL

Quizlet has a “freemium” business model. Students and educators can purchase subscriptions to access premium features.

CUSTOMER TESTIMONIAL

“I tend to procrastinate studying for tests if I study at all. Using Quizlet has helped me actually want to study because it has proven successful in preparing me for my tests. There’s just something about typing out my own questions and studying them using fun things like flashcards and games that I just absolutely love!”

— Katherine Finger, student.



MATTHEW GLOTZBACH

CEO

Matthew Glotzbach is the CEO of Quizlet, the consumer learning platform used by over 50 million people around the world each month. He joined Quizlet from 12 years at Google, where he was most recently VP Product Management at YouTube and was on the founding team of Google Apps and lead product for Google Apps for Edu. Matthew is focused on building large-scale, engaging products that solve real-world problems while also generating revenue.



ANDREW SUTHERLAND

Founder

Andrew Sutherland founded Quizlet in 2005 while a sophomore at Albany High School in California, originally building a website to help himself study French vocabulary. He studied computer science at MIT, which he left after three years to continue working on Quizlet. In 2012 and 2013, he was featured in Forbes Magazine’s 30 under 30 List for Education.

PAIN

Studying is a challenge. Students often lack either the know-how or the motivation to effectively learn. Burnout, distractions, and poor time management all make it tough for students to confidently prepare for whatever school throws their way.

SOLUTION

Quizlet offers study activities to effectively prepare students for tests, exams, certification assessments, and whatever else they need to study. By providing a variety of different study activities, Quizlet is used in conjunction with any type of learning to help students effectively and efficiently reach their learning goals. Quizlet’s study activities include flashcards, practice questions, interactive diagrams and games.

PRIMARY STAKEHOLDERS

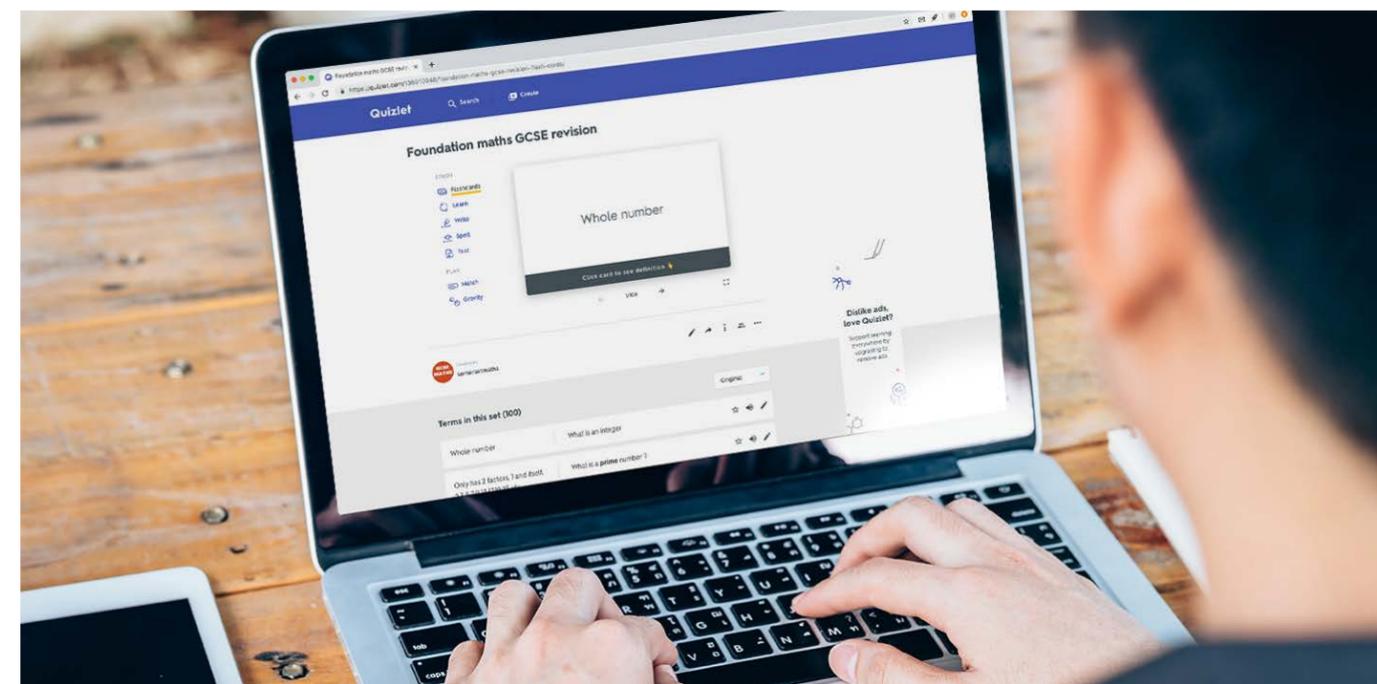
Students and teachers across middle school, high school and higher education.

RECOMMENDED PRODUCT USAGE

Students choose to use Quizlet to help them get closer to a learning goal — whether that be an “A” on an individual test, or passing a large, professional-certification exam. As a result, student usage varies, with some students relying on Quizlet every day in the weeks leading up to an exam, and others choosing to study with Quizlet in clusters each month leading up to a test. Students study with Quizlet on our website as well as our mobile app.

“With over a billion questions answered on Quizlet each week, we’re excited to continue investing in our machine-learning and artificial-intelligence capabilities to make learning more personal for students. Whether it’s for traditional academics, personal interests, or for specific certifications, millions of people use Quizlet to study effectively. As our international growth continues, we want to continue to provide the most effective practice-to-mastery learning experience in the world.”

– Matthew Glotzbach, CEO



QUIZLET BY THE NUMBERS

USERS

1b+

Questions answered each week on Quizlet

REACH

50m+

Both teachers and students

50

States

130+

Countries

PRODUCT OUTCOMES

OUTCOME 1: HELP STUDENTS STUDY BETTER.

Metrics:

- Students ask over **1 billion** questions on Quizlet each week.
- More than **400 million** virtual study guides have been created.
- **90%** of students study more than one subject on Quizlet; **35%** of students use Quizlet for five or more subjects.



1 STUDENT SPOTLIGHTS

USER SPOTLIGHT NO. 1 TURNING ROADBLOCKS INTO STEPPING STONES.

Tanya Ambrose, a senior at Georgia State University, has confronted her fair share of challenges. But, as she details in her blog, “All About the Scrub Life,” Tanya turned every perceived roadblock into an opportunity.

Tanya spent most of her life in Antigua before moving to the United States in 2009. After arriving in New York City, Tanya enrolled in community college and earned her associate’s degree in liberal arts. Shortly after, she began a nursing program where she excelled in her studies. Unfortunately, Tanya lost her grandmother that year, and life overtook academics in her priorities. As a result, she had to withdraw from her nursing program.

Once life settled, to continue her dream of making a positive impact in healthcare, Tanya took a job caring for people at a nursing home. Through that change in life’s circumstances, she became inspired to pursue a degree in public health, and she was accepted to Georgia State University.

Tanya discovered Quizlet when she started studying nursing and, though she’s changed states and programs, she says that studying with Quizlet has especially helped build her confidence as she’s gotten back into the rhythm of academic life.

“At first I didn’t believe my classmate when I was told about Quizlet because I just couldn’t believe there was such a thing that existed. Since then, the app keeps getting better and has never failed me.”

As a public-health major, Tanya is required to memorize an extensive amount of terms and definitions as well as the application of these concepts in the healthcare field. Her go-to study partner is Quizlet.

“I like that I’m able to create my own study sets. I especially love that I can find almost every subject area.

I’m able to get in-depth explanations about certain topics that I may not find in my textbook,” she says. “Quizlet has made studying somewhat less stressful. I love that I have it at the palm of my hands, which makes it easier for me to study while on the go. I especially love the match sets, it helps me with my critical thinking and memory.”

Tanya is a senior on-track to graduate in May, 2020 with her undergraduate degree. Next on her plate is pursuing a master’s degree in public health, concentrating in maternal, infant, and child health on a global level, so she can help improve the health and well-being of families, both in the United States, and in her home country of Antigua. How? She wants to have her own nonprofit organization geared towards helping those from low-income populations.

Readers can learn more about Tanya and follow her journey by checking out her blog, “All About the Scrub Life,” and her Instagram page, @AllAboutTheScrubLife.



USER SPOTLIGHT NO. 2 QUIZLET + MATH = STUDENT OWNERSHIP OF LEARNING.

Rory Yakubov, a math teacher in Matawan, New Jersey, has been championing the use of Quizlet in her algebra and geometry courses since 2017.

“My students are now more in control of their learning than ever. They are not constrained to a set of math problems on paper,” she explains. “They are now able to practice problems and then practice them again — all at their fingertips on their phones. My students never even have to question what to study — they know I have already put it all in a Quizlet study set for them.”

Rory’s student comments: “Math is like a foreign language, but the words are a mixture of numbers and letters at random.” Luckily, teachers like Rory use Quizlet to help students practice and master advanced math operations.

Rory creates practice equations using numbers, letters and symbols, just like traditional workbooks offer, but Quizlet’s Flashcard activity allows her students to quiz themselves by working out the problem first. If they get stuck, they can flip the digital card on the screen to learn the answer. It’s

more interactive and a lot less frustrating for them, she says.

Rory organizes her Quizlet study sets based on units in each of the math classes she teaches. Then she creates study sets with equations and adds mathematical notation onto each digital study card.

With more and more teachers interested in using Quizlet for math, Rory was able to host a “Quizlet and Math” webinar in fall 2019 as part of Quizlet’s monthly Teacher Series. For those interested in seeing how she seamlessly integrates Quizlet into algebra and geometry classrooms, Rory’s webinar can be found on Quizlet’s YouTube channel.

Rory has seen amazing progress in her students when using Quizlet.

“When my students do well on an assessment, usually one of the things I hear is, ‘I did the Quizlets!’ It is so meaningful to me because I was able to give them easy access to practice, and they are now reaping the benefits — successful grades — because of it!”

To find out more about Rory, check out her Instagram @iteachalgebra, her Twitter @yakubovmath, and her website, iteachalgebra.com.





CEO	Jes Wolfe
FOUNDED	2012
NOTABLE CO-INVESTORS	Base10, numerous high profile angels
WEBSITE	www.rebelgirls.com
HEADQUARTERS	San Francisco, California
FOCUS	Children's Edutainment

COMPANY

Rebel Girls is the preeminent, girl-driven edutainment company, on a mission to inspire and instill confidence in 50 million girls over the next five years. With its universe of award-winning books and podcasts, along with toys and digital media, it introduces girls to diverse stories of extraordinary women from the past and present, and inspires girls from all backgrounds and experiences to pursue their dreams without limits. Its community of self-identified Rebel Girls is made up of girls and women, from five to 95-plus years old; across 85 countries. There have been 5.5 million books sold, in 49 languages, and 7 million podcast downloads.

BUSINESS MODEL

Rebel Girls sells children's books, and provides audio content to adults and children. It is also creating video and digital content for children.

CUSTOMER TESTIMONIAL

"I have been reading Goodnight Rebel Girls to my daughter (five years old) for a while now, and wondered what she was taking in. Tonight, her best friend, who is a little boy, told her that girls were not awesome because they wore lipstick. She indignantly marched off to her room and fetched the book, telling him, with a finger stabbing at the book, that he was wrong. She had a whole book of awesome girls he needed to know about. So: Thank you for giving my daughter something I never had. A whole book of awesome girls."



ELENA FAVILLI

Founder and Chief Creative Officer

Elena is the founder and chief creative officer at Rebel Girls. Prior to founding the company, she was a journalist for Colors magazine, McSweeney's, RAI, Il Post, and La Repubblica. She has a degree from the University of Bologna, and UC Berkeley.



JES WOLFE

President and CEO

Jes is the CEO of Rebel Girls. Previously, she held numerous operating and advising roles, including COO of Hoodline (sold to Nextdoor), BCG, Morgan Stanley, and the World Bank. She holds an MBA from Stanford and a B.A. from UC Berkeley.

“Rebel Girls is on a mission to inspire and instill confidence in 50 million girls. We want to empower an entire generation of girls to pursue their dreams without limits. We’re excited to see a world with true, gender equality.”

– Jes Wolfe, CEO

PAIN

Only 19% of children’s books showcase women with jobs or career ambition; 54% of women (ages 35-plus) say childhood gender stereotypes leave a negative impact on their adult life. Said differently: There is a lack of female representation in children’s media. There is a corresponding confidence gap that girls have by the age of six, when they think they are less smart and capable than boys.

SOLUTION

Amazing children’s content, showcasing a diverse array of extraordinary, real-life female heroines.

PRIMARY PRODUCT STAKEHOLDERS

Girls and parents

RECOMMENDED PRODUCT USAGE

Currently, children read the books, listen to the podcasts, and do the activities in the Rebel Girls journals and books.



REBEL GIRLS BY THE NUMBERS

REACH

10m+

Users

50

States

85

Countries: United States, the United Kingdom, Mexico, Italy, France, Germany, Sweden, Australia, Brazil, and Spain.

ACCESS

75%

Purchasers on the website are female.
Average age is 30-45.

PRODUCT OUTCOMES

OUTCOME 1: CREATING A GENERATION OF INSPIRED AND CONFIDENT GIRLS

DESCRIPTION: Number of girls consuming and engaging with Rebel Girls content

Metrics: **10 million** girls reached to date across **85** countries in **49** different languages

OUTCOME 2: PROVIDING GIRLS WITH REAL-LIFE HEROINES AND ROLE MODEL

DESCRIPTION: Number of stories of diverse, strong women

Metrics: **300+** stories of real-life extraordinary women from around the globe. The podcasts which now have over **9 million** downloads are also narrated by strong women leaders like Melinda Gates and Jameela Jamil.



1 REBEL GIRLS AT HOME

As a result of COVID-19's shuttering of schools, teachers, parents and students were left overwhelmed by the lack of educational tools available to ease online learning. Educational content suddenly had to meet three requirements: the ability to be virtual, widely accessible, and inexpensive. As a response to this growing need, Rebel Girls quickly developed and launched a new microsite to host a number of Rebel Girls-published activities, to use for free. The "Rebel Girls at Home" campaign hosted interactive activities spanning the gamut from teachable self-awareness and courage, to how to write a business plan.

Included in the campaign in full was, *I Am a Rebel Girl: A Journal to Start Revolutions*, a journal designed as a space for girls to challenge perspective, induce thought and ignite action. The 90-plus prompts provide guidance while leaving space for creativity. The pages in the journal invite girls to explore thoughts like, "these rules don't make sense to me," "love poem to my body hair," and "all the feelings I've felt today."

In addition to the journal, the campaign hosted downloadable worksheets from four of the latest books in the "Rebel Girls Chapter Book Series": *Madam C.J. Walker Builds a Business*, *Wangari Maathai Plants a Forest*, *Ada Lovelace Cracks the Code*, and *Junko Tabei Masters the Mountains*. Inspired by entrepreneur, Madam C.J. Walker, and created alongside *iFundWomen*, girls were invited to create their own business plan. In honor of environmentalist Wangari Maathai, and created in partnership with the Green Belt Movement, girls were encouraged to plant their own gardens. In homage to the 19th-century mathematician, Ada Lovelace, and developed in partnership with *Wogrammer*, girls could try their hand at computer programming. And, as a nod to mountaineer Junko Tabei, written in partnership with *Cotopaxi*, girls were taught the skills to "climb" their first mountain. Rebel Girls is continually adding free activities to the microsite, most recently, from its upcoming August release, *Alicia Alonso Takes the Stage*, a worksheet that teaches girls to take up space.

The Rebel Girls at Home pack was also supported by an award-winning podcast that gave families access to 20-minute read-alouds about the women within the "Good Night Stories for Rebel Girls" series. Reorganized to be heard in chronological order, the podcast episodes acted as a much-needed update to dull, history textbooks that fail to acknowledge the impact of remarkable women in time.

The activities available in the Rebel Girls at Home campaign took a narrative approach to education, blending entertainment with project-based learning. The concept also focused on leveraging real-life role models to inspire real girls in pursuit of their dreams, offering a welcome distraction, to kids looking for new forms of entertainment, to teachers, looking for materials to supplement classwork, and to parents, looking for screen-free children's activities. The impeccable design was engaging, thoughtful and comforting. The content filled an education gap, introducing students to subjects infrequently taught in school. Who better for girls to learn from than influential innovators throughout history, all of whom broke the glass ceiling for women?

The Rebel Girls at Home campaign is an early look at a future model of education: One where brands flex to meet the needs of an engaged audience, and develop practical materials that add to growth and development. Due to its agility and relevance, the campaign garnered press coverage in outlets like *Forbes*, the *Washington Post*, *TODAY*, *PopSugar*, and *Romper*.

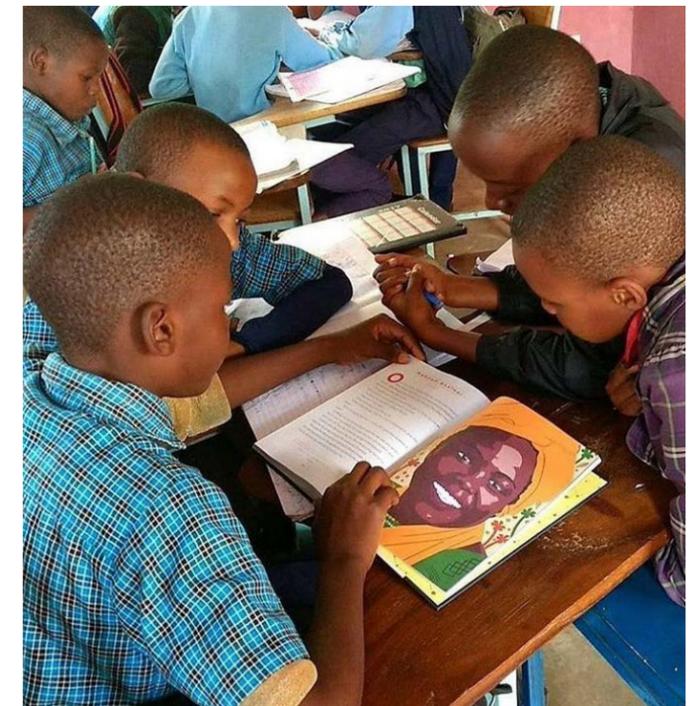
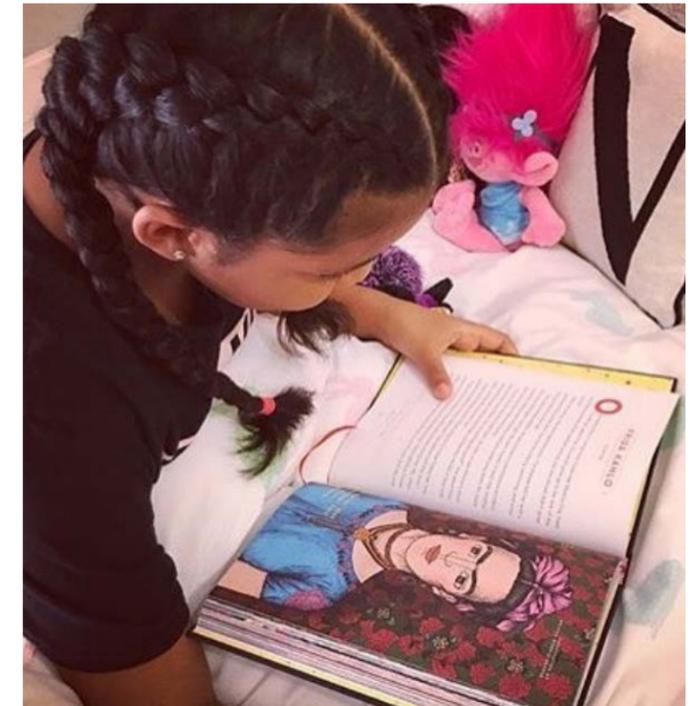
Effectively, Rebel Girls at Home addressed a need, and filled a gap. An unprecedented event occurred, challenging the way we know learning. Rebel Girls reacted with a solution, providing support to parents, educators and students wary of the unknown.

CUSTOMER AND USER TESTIMONIALS:

I do appreciate rebel girls and your free products to help get us through the virus quarantine! Stay Rebel!
– Kristen Pappas

Thank you!! These off-line activities are EXACTLY what we need at our home for our girls. Bless you all with strength and good health.
– Juli Evans

Thank you so much for allowing your PDF resources to be shared with our Girls' Brigade families. We have a closed Facebook page and each week are posting a voluntary "Challenge" for our members to complete as a fun activity to do whilst we are all in isolation and unable to meet. We hope this will help families have fun together and cope with the anxieties that COVID-19 is creating. We already had a couple of your books for girls that we have enjoyed reading. We wish you all the best.
– Brenda Smith (1st Camo Girls' Brigade Company)



2 COVID-19 REFLECTIONS

How would you say that COVID-19 has impacted the ed-tech landscape?

Digital and physical products for education and entertainment are more important than ever, so that children and students can have myriad things to do and ways to learn while physical schools are shut down.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

We launched “Rebel Girls at Home” to provide girls around the world with free activities and resources while they are sheltering at home. We also provided our free podcast with amazing new episodes, released every second week.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

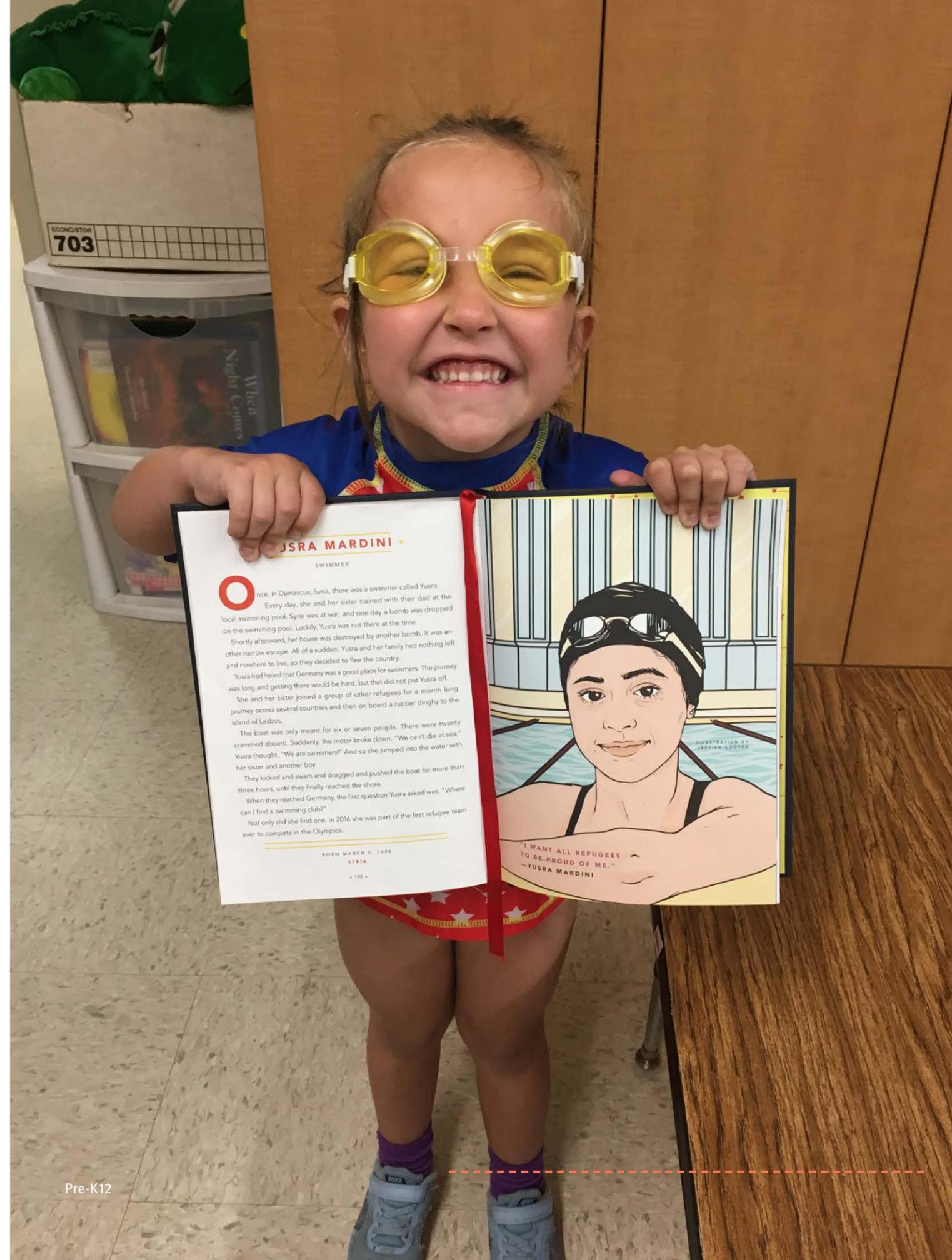
Parents’ needs have changed. Now they need more high-quality longer-form content, whereas pre-COVID-19, they were mostly looking for snackable content.

Could you provide a couple of examples of the early impact that you’re seeing as a result of your COVID-19 efforts?

10,000+ people signed up for our “Rebel Girls at Home” free resources, and downloaded them.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

The value proposition for high-quality educational content and materials that instill confidence in girls is greater than ever before.





CEO

Brian Grey

FOUNDED

2011

NOTABLE CO-INVESTORS

GSV Acceleration, Kleiner Perkins, Social Capital

WEBSITE

www.remind.com

HEADQUARTERS

San Francisco, California

FOCUS

Communication

COMPANY

Remind, the leading communication platform in education, helps educators reach students and parents where they are. Over 30 million people use Remind to communicate about teaching and learning, to share content, and to build stronger relationships — right from their phones. With powerful, easy-to-use features that allow schools, districts and other education organizations to activate engagement across their communities, Remind connects the people and resources that help give every student the opportunity to succeed.

CUSTOMER TESTIMONIAL

“Remind has been invaluable to our district during this year’s closures. We’ve seen a fourfold increase in the number of messages sent every week; over a hundred new teachers using the service; and thousands more students and families being reached. The ability to check in through text has been so important in maintaining contact with our students and ensuring their personal and academic well-being.”

— Gavin Lees, assistant director of instructional technology, Auburn School District, Washington

BUSINESS MODEL

Remind offers a paid, enterprise plan for schools, districts and other educational organizations, and a free plan for classroom teachers.



BRIAN GREY

CEO

Brian Grey joined Remind as CEO in 2016 and comes from a family of educators with nearly a century of teaching experience among them. Prior to Remind, Brian was CEO at Bleacher Report, Inc., and previously, held senior executive positions at Fox Sports, Yahoo!, Shutterstock, and AOL-Netscape.



BRETT KOPF AND DAVID KOPF

Co-Founders

Brett Kopf and David Kopf founded Remind in 2011 as recent college graduates, to help give every student the same kind of support they had from their teachers, mentors and family members growing up.

PAIN

Administrators don't have an actionable way to improve engagement across their schools and districts.

SOLUTION

Remind provides a way to activate engagement across an entire organization — classroom, school, and district office — by harnessing the communication that's already happening between educators, students and parents.

PRIMARY STAKEHOLDERS

Administrators, teachers, parents and students

RECOMMENDED PRODUCT USAGE

Remind can be used for nearly every communication need in an educational setting — with announcements, two-way messaging, small group conversations, scheduled messages, automated messaging, organization wide messaging, urgent messaging, voice calls, and more.

“Despite incredibly challenging circumstances this year, educators have found ways to use Remind to provide instruction, share guidance, and offer reassurance to students and their families. We're heartened that schools and district communities can rely on our platform to stay connected and keep learning, whether on-site, or at home.”

– Brian Grey, CEO



REMIND BY THE NUMBERS

REACH

400m+

Messages delivered every week

30m+

Monthly, active users

2.6m+

Monthly, active educators

104k+

Schools

750+

Districts

50

States

ACCESS

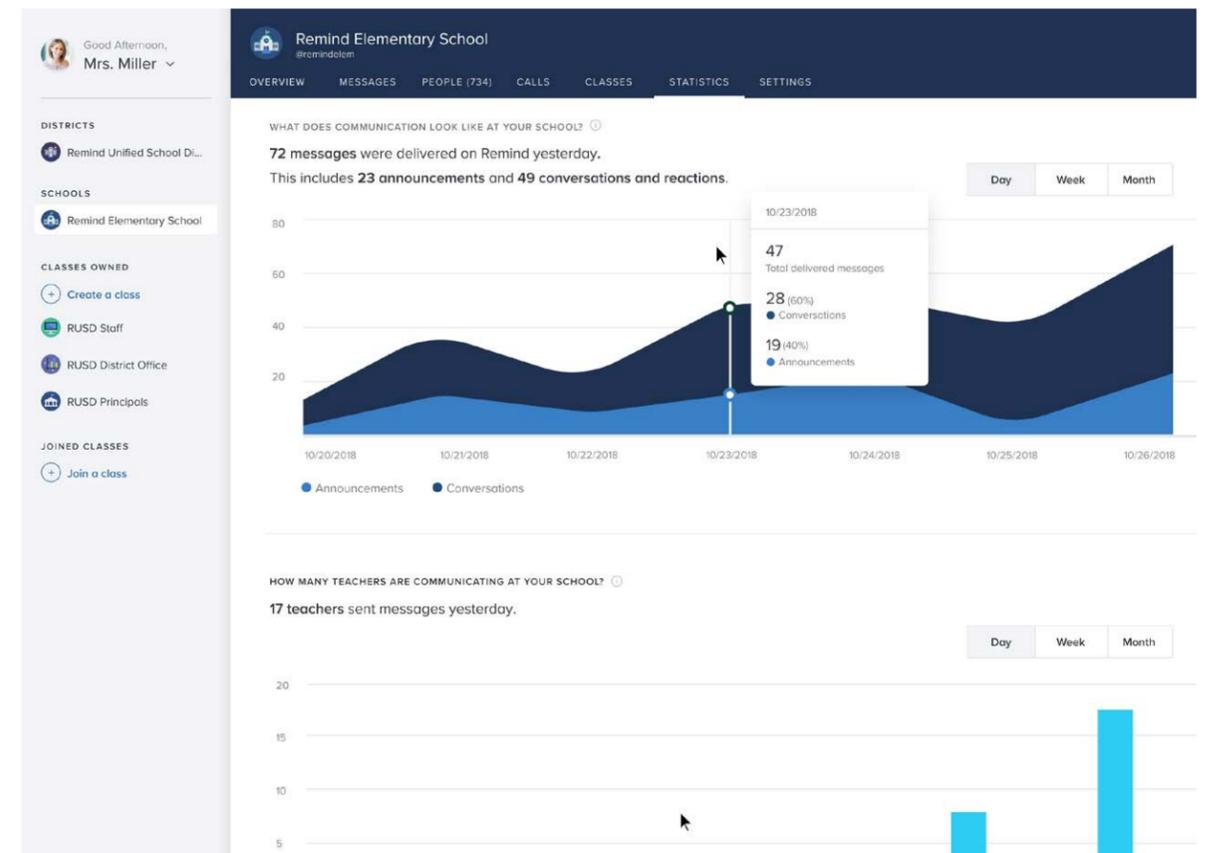
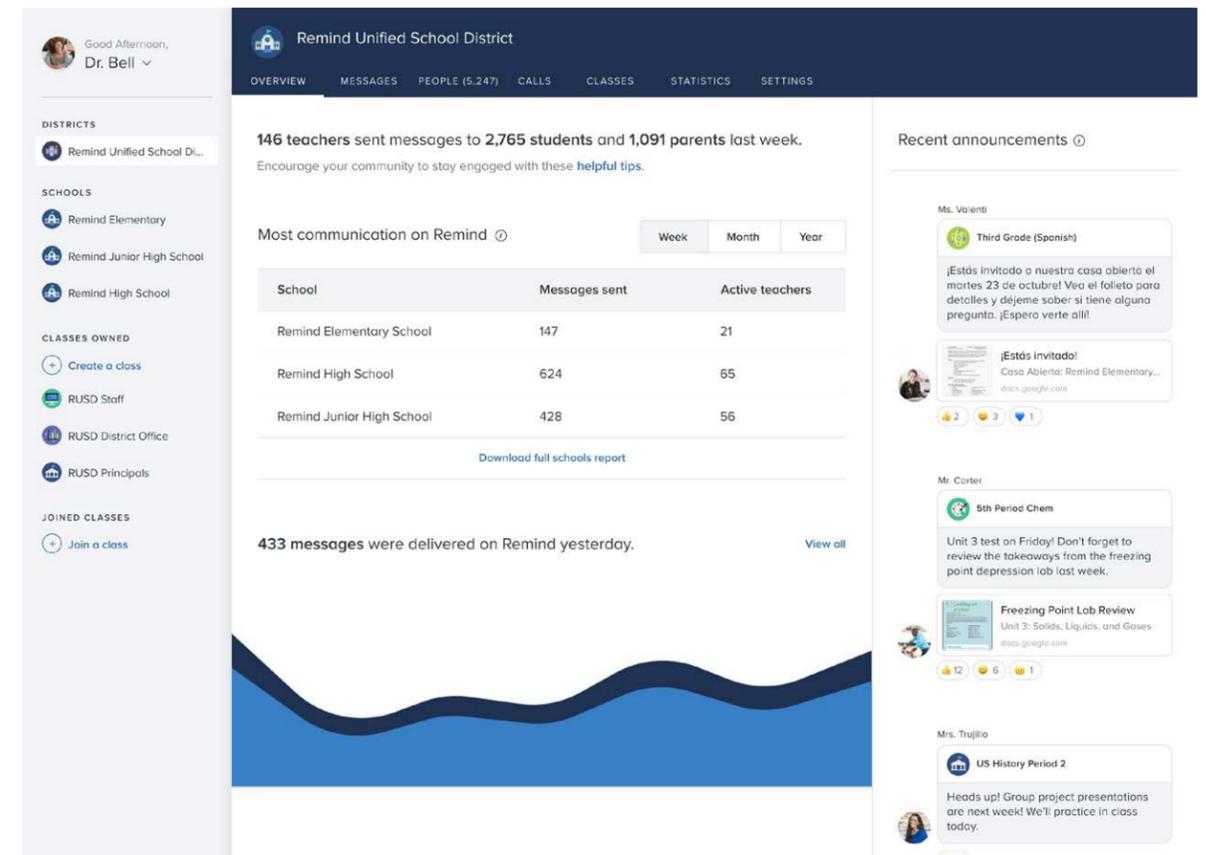
90%

Title I schools

80%

United States public schools

The Remind plan is also available for organizations in Canada.



PRODUCT OUTCOMES

OUTCOME 1: IMPROVE ENGAGEMENT

DESCRIPTION: The Remind engagement rating is based on publicly available school data, and usage statistics from Remind, both, for individual organizations, and aggregated at the state and national levels. Using these data, each school's rating is calculated from the reach, cadence, and quality of engagement across the organization. In ascending order, the four ratings are: Emerging, Growing, Active, and Engaged.

Engagement ratings for schools with a free plan:

	Q2, 2019	Q2, 2020
EMERGING	57%	24%
GROWING	20%	24%
ACTIVE	14%	23%
ENGAGED	9%	28%

OUTCOME 2: EFFECTIVENESS

- **86%** of surveyed teachers said that using Remind saves time in their day. Teachers who don't use Remind rely on at least twice as many tools for family engagement.
- Teachers who don't use Remind communicate with parents from one to three times a year, whereas teachers with Remind communicate with parents **7+** times a year.
- Teachers without Remind are two times more likely to characterize their communications with families as "negative."

OUTCOME 3: ACADEMIC OUTCOMES

- **81%** of surveyed teachers agreed that two-way communication with families leads to better outcomes.
- **78%** of surveyed teachers reported that students were more likely to complete assignments because of Remind.

1 A FAST-GROWING DISTRICT STREAMLINES COMMUNICATION AND IMPROVES OVERSIGHT

A fast-growing district streamlines communication and improves oversight:

- Students enrolled in 25 middle and high schools: **32,000.**
- Messages delivered last year: **18.1 million.**
- Students and parents who received messages last year: **44,000.**

At Frisco Independent School District, just north of Dallas, Texas, district administrators didn't have a problem reaching families. Instead, their challenge was finding a way to support all the communication that came with being one of the fastest-growing districts in the country — especially with a policy that prohibited staff members from sharing personal contact information with students and families.

One district policy, and many communication channels.

With its updated communication policy, Frisco educators struggled to find a safe and effective way to communicate. “Coaches, in particular, needed to communicate outside of school,” said Cheryl McDonald, Director of digital learning services at Frisco ISD. “They were trying to use Twitter, or their campus Facebook pages to share when buses were running late, the weather was bad, or schedules changed.”

The inconvenience of multiple communication channels didn't affect just staff members. Frisco families often had students in several grades and schools. “We heard a lot from our community, ‘One source, please. Don't make me go here for this and there for that,’” said Teri Essy, Coordinator of secondary instructional technology. “Parents wanted one, easy platform for all of their communications.”

“The best part about Remind is the interaction with students, but parents also love it because they can stay up to date with what their kids are doing. I love keeping parents in the loop while they still have their kiddos at home.” — Kenneth Schiumo Jr., teacher and coach at Liberty High School.

An easy-to-use platform at every level.

It was clear that Frisco needed to address communication at a larger scale. “Staff members already had to notify their campus administrators when they started using a new communication platform to make sure there was appropriate oversight,” said Essy, “so we decided to streamline to a handful that we knew were safe.”

“The safety of this app is appealing. I don't have my students' numbers and they don't have mine, but I can contact them any time. There's a log of all communication, and I appreciate that it's not associated with social media.” — Jennifer Jackson, teacher and club advisor at Centennial High School.

“We'd already been recommending Remind because it's so intuitive and easy to use, so it was a natural switch,” McDonald said of the district's decision to purchase a Remind plan for Frisco's 25 middle schools and high schools. “With Remind, we hardly needed any training at all, and that says a lot about why a majority of our teachers are using it now.”

Driving engagement in a growing community.

From their already active base, the district saw an additional 20% increase in the number of educators, students and parents using Remind to communicate every month. “We've really encouraged our teachers to use Remind for all of their communication,” Essy said. “If they need to text a kid a message, they can do it through Remind. If they need to call a parent, they can do it through Remind.”

“Remind changed my classroom. As soon as I think of something, I can load it into Remind, set the date and time that it needs to go out, and then — done! It frees up my brain space, which is a limited commodity for a teacher.” — ChrisLynn Hernandez, teacher at Wakeland High School.

As the district opens several new campuses to accommodate increasing enrollment, Remind also provides a way to welcome new families and staff members to the community. For the nearly 700 new teachers joining Frisco ISD next year, Remind lets them hit the ground running.

“It's nice to be able to give our teachers one platform that we're using and supporting as a district,” McDonald said. “Some are veteran teachers who are new to our district, but a lot are brand new to the profession. Things can be overwhelming, and Remind is one way we can help them get started — with communication that's easy to use.”



2 5 WAYS TEACHERS ARE USING REMIND DURING SCHOOL CLOSURES

In the absence of in-person instruction, effective communication between school and home is essential to student learning. Because of rapidly evolving circumstances, and vastly disparate resources available to different communities, ed-tech tools need to be able to support a wide variety of needs and use cases. More than ever, schools and districts need access to services and software that help close the digital divide. Here are five ways teachers are leveraging Remind:

1. To check in with students and families.

Send home inspirational messages and affirmations help keep spirits up. (Gifs and memes also work too, if that's how your classes roll.) Ask your class to reply with how they're doing.

2. To make distance learning work.

Whether that means sending home materials, teaching by text, or organizing activities—whatever works for each teacher and classroom.

3. To see photos of student learning.

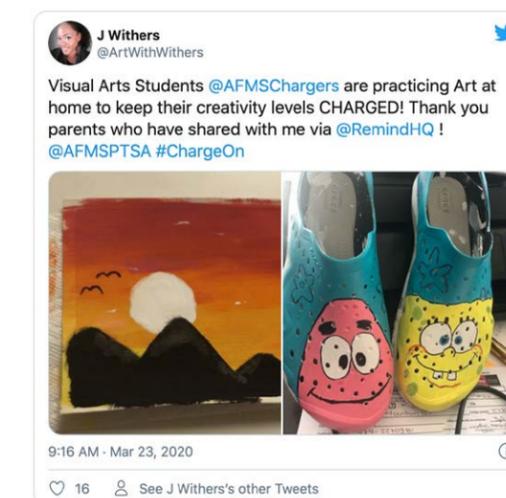
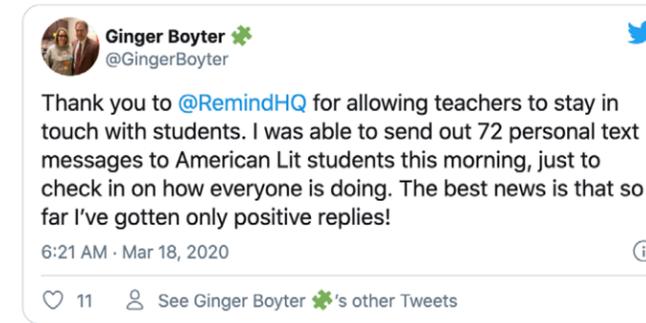
Pictures from students and parents show that learning at home can come in many different forms, some of them unexpected—and all of them heartwarming.

4. To organize ways to learn together in real time.

- Step 1: Set up a video session.
- Step 2: Make sure students and parents get the invitation in time to join the session.
- Step 3: Success!

5. To stay connected.

Setting up an open line of communication can encourage students to reach out with questions about classwork.





securly://

CEO

Bharath Madhusudan

FOUNDED

2012

NOTABLE CO-INVESTORS

Sinovation Ventures, Zhen Fund, Imagine K-12

WEBSITE

www.securly.com

HEADQUARTERS

San Jose, California

FOCUS

Safety

COMPANY

Securly is the end-to-end student safety and device-management platform for K-12. Its 360-degree approach includes cloud-based web filtering for all devices, and real-time email, docs, and drive scanning, with artificial-intelligence-based notifications for nudity, bullying, self-harm and violence. Securly's "24 Team" of specialists works with its AI to analyze flagged activity notifications 24/7, and to notify schools directly when alerts are determined to be urgent.

Securly's other solutions include classroom- and device-management tools, parental controls for school-issued devices at home, and personal devices that are on-the-go; an anonymous tip line, visitor management, and an emergency-notification system.

BUSINESS MODEL

Securly provides end-to-end solutions for school districts. With its suite of products designed to address a district's safety, management and community-engagement needs, Securly's full solution includes cloud-based web filtering, device-management tools, and visitor-management and emergency-notification systems.

CUSTOMER TESTIMONIAL

"Securly Auditor and the Parent Portal have had the biggest impact for us. From increasing visibility into student safety or bullying issues, and being able to provide help when needed, to giving our parents insight into their children's browsing activity, and even providing some level of extra control when students are off of our network, these products have been outstanding."

— Shane Snedecor, Information Security Manager, Virginia Beach Public Schools.



VINAY MAHADIK

Co-founder

From a security-research-intern position at Lawrence Berkeley National Labs, and experience as a vulnerability engineer at Qualys, to later, running multiple product lines and research teams as a senior R & D manager at McAfee, Vinay brings decades of experience in both engineering and business-operations management. Vinay is listed as a primary inventor on several patents and holds an MBA from the Wharton School of Business.



BHARATH MADHUSUDAN

Co-founder and CEO

Bharath wrote the first version of Securly’s core filtering engine, and led the sales team that sold the first 200 accounts. As chief revenue officer, he combined his engineering mindset and his operational experience in sales and marketing to help Securly achieve the next level of scale. Bharath has a masters in computer science from Washington University at St Louis, and over a decade of enterprise-security and engineering experience.

PAIN

Today’s students have grown up with smartphones in their hands and the internet at their fingertips. Playground bullying has given way to cyberbullying; warning signs of self-harm have grown harder to see; and the internet’s dark corners have become easier than ever for young minds to find. In today’s digital age, schools and parents hold the key to students’ safety and well-being. It’s critical that they have access to technology that empowers them to keep students safe.

SOLUTION

In order to keep students safe in today’s digital age, schools and parents require a full suite of solutions that touches every aspect of the learning experience — from filtering, and device management, to self-harm detection.

- In schools, IT administrators need a single dashboard to manage their networks and one-to-one devices.
- Educators need tools to keep students productive and on-task in the classroom.
- Counselors need insight into the mental health of their students.
- Superintendents need data to make better decisions for the future of their districts.
- At home, parents need control with full visibility into their children's activities on every device.

PRIMARY STAKEHOLDERS

IT administrators, educators, and parents all use Securly’s suite of products.

RECOMMENDED PRODUCT USAGE

Securly works with districts to implement cloud-based web filtering, email, docs, and drive scanning, and 24/7 analysis of flagged activity notifications. Once these solutions are in place, Securly’s artificial intelligence uses Natural Language Processing to analyze context, identify slang or colloquial speech (with, or without typos), and analyze key-phrase and keyword search results across all digital content. This allows for the broadest monitoring and scanning of web searches, documents, content in drives, social media, emails (and nudity detection of their attachments). With Securly’s solutions in place, students are protected from harmful content, and districts are notified when students may be struggling and need help.

In its broader product suite, Securly provides classroom and device management for educators, parental controls for school-issued devices at home, and personal devices that are on-the-go, an anonymous tip line for students, and visitor-management and emergency-notification solutions that enable schools to keep students safe, and parents informed.

“Securly is in the business of inventing detection and prevention mechanisms for the pandemic that not many people talk about – depression, bullying and self-harm in our youth.”

– Bharath Madhusudan, CEO

SECURLY BY THE NUMBERS

USAGE

DEVICE CONSOLE
(CLASSROOM/MDM)

3.4

Administrators: visits per week

15.2

Teachers: average classes held
per week

6.3

Teachers: average days active

SAFETY CONSOLE (FILTER,
AUDITOR OR 24 TEAM)

2.5

Administrators visits per week

REACH

5m+

Students

12.4k+

Educators

50

States, Puerto Rico, and
the District of Columbia

19

Countries, including the United States,
the United Kingdom, Canada, Spain,
Australia, New Zealand, Switzerland,
Mexico, Kuwait and Romania.

ACCESS

35.5%

Free-reduced lunch
students

6.5%

English Language Learners

42.5%

Students of color

4%

Asian or Pacific Islander

18%

Latinx

14.5%

Black

57.4%

White

4.8%

Two or more races

PRODUCT OUTCOMES

OUTCOME 1: PROTECT STUDENTS FROM HARMFUL CONTENT

DESCRIPTION: Flag “alarming” content across all the key vectors of student online activity

Metrics:

Websites flagged per day, on average: **52.28**

Emails flagged per day, on average: **1,797.93**

Web searches flagged per day, on average: **3,366.16**

Social-media posts flagged per day, on average: **19.37**

OUTCOME 2: SAVE STUDENT LIVES

DESCRIPTION: Contact district contacts when Securly sees urgent, highly-“alarming” student activity

Metrics: Lives saved to date in 2019-2020: **544**

OUTCOME 3: ALERT DISTRICTS TO “ALARMING” CONTENT

DESCRIPTION: Send alerts when Securly artificial intelligence flags “alarming” activity.

2020 metrics (through June 2020); breakdown of alerts by topics:

Alcohol or drug: **159**

Bullying: **221**

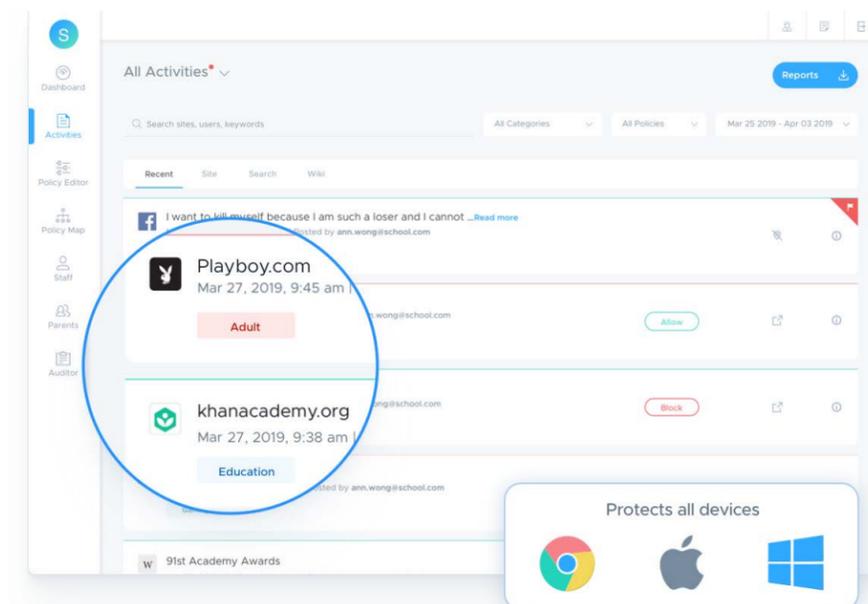
Depression: **1,560**

Self-harm: **671**

Sexual related: **15**

Suicide: **2085**

Violence: **412**



1 PROTECTING KIDS FROM SELF-HARM

Home

In the early days of school closures, Securly sent a real-time alert to a parent's Home app regarding a young girl's search of the phrase, "how to hurt yourself," and her subsequent visit to "crisistextline.org/topics/self-harm." The parents immediately started a conversation with the girl who, as it turned out, was very frustrated with distance learning and was missing her friends. Because of the notification, a conversation was able to take place before the issues the girl was experiencing became too overwhelming.

24

In one case, the Securly team identified a student at risk of suicide due to this string of searches:

- "Can you overdose apple cider complete pills"
- "How many apple cider vinegar pills can you take a day"
- "Women's ultra mega pills overdose"
- "Overdose on tylenol"

From there, the student visited websites, such as, "suicidepreventlifeline.org," and "quora.com/How-do-I-kill-myself-in-10-ways." As the situation was being reported, the dispatch person kept saying, "and this is live?" and the 24 Team members responded, "Yes, and she just searched or visited this additional thing. ..."

The student was able to receive mental-health services after that activity had been flagged.



2 KEEPING STUDENTS SAFE DURING UNCERTAIN TIMES

When concerns over the spread of COVID-19 forced schools to close their doors, the majority of U.S. students transitioned to a distance-learning model. Educators pivoted to provide students with continued learning and support as education moved off campus, but it was still a difficult shift for students. Students were no longer able to meet with their friends, classmates and school staff face-to-face. The absence of these interactions began to weigh on students' mental health, and many of them started showing signs that they were struggling under lockdown.

AN INCREASE IN ONLINE ACTIVITY

As distance learning began, Securly saw sharp increases in the use of Google collaboration services. These services are intended for educational purposes, but activity can occasionally indicate that a student may be struggling with mental-health issues. With the shift to distance learning, it became increasingly important for school staff to rely on online tools to understand whether their students needed help.

If school staff are unable to identify students who are experiencing anxiety, depression or grief, they cannot use the resources already in place to help students.

Since many children are not forthcoming with struggles they may be experiencing, tools such as Securly's Auditor — which uses artificial intelligence to detect cyberbullying, self-harm, or grief sentiments in students' email, or in Google Docs or Google Drive — helped schools keep their students safe as they navigated the shift to distance learning. Auditor helped them identify warning signs among their students in real time.

Jeanine Leys, director of digital learning and innovation at Stratford Schools, noted “an uptick in searches for suicide-prevention hotlines, etc. A lot of it was tied with assignments that were being pushed out — giving you a window into what kids are talking about in their natural habitat when adults are not around. We saw students being overwhelmed, with not being connected to friends; feeling lonely.”

ADDING A HUMAN TOUCH

With Securly's 24 service, the AI notifications flagged by Securly's Auditor tool can be monitored 24/7 by trained analysts. As students adjusted to remote learning, in addition to needing greater visibility into “alarming” activity, schools saw a clearer need for a 24-hour monitoring service as there was a shift in the days and times of when extreme alerts were occurring. Prior to the COVID-19 pandemic, data showed that 59% of “extreme risk” notifications (defined as a 24 analyst determining that a student would be likely to hurt themselves or others within the next 24 hours) happened during school hours. After the COVID-19 pandemic, only 44% of “extreme notifications” happened during school hours.

With more alerts happening outside of school hours, the 24 teams heard from many schools that their escalation preference for high-risk alerts had changed. Instead of the pre-COVID-19-pandemic process, where the 24 Team reached out to the school's designated contact, schools now preferred local police to perform the necessary wellness checks. The police were much better equipped to respond to emergency situations after hours than were administrators or counselors, and the 24 Team was able to work closely with schools to implement these changes, ensuring that students continued to receive critical help in a distance-learning environment.

PARTNERSHIP WITH PARENTS

Schools and students were not the only ones who had to adjust when learning moved off-campus.

When schools pivoted to distance learning, millions of parents suddenly found themselves having to act as teachers and administrators in their own homes.

They also had a lot of questions about online safety and privacy. For Securly parents, Securly's Home product provided them with visibility and hands-on controls for all the school devices that suddenly came home.

Quintana Patterson, Sr. information-security analyst at Jefferson County Schools, recognized that her district's parents needed a tool like this in place at the very onset of the school closures: “Our parent community is extremely in tune with what their students are doing online. During normal times, we have a constant stream of Helpdesk tickets from parents, asking for activity reports. With all of our students at home 24/7, we anticipated an increase in this regard and turned on the parent portal for each of our 86,000 students.”

The combination of Auditor, 24 and Home made an immediate impact on one student in the early days of school closures when Securly's Auditor tool caught a young girl's search for the phrase, “how to hurt yourself.” The 24 Team notified the school, who reached out to the student's parents. As it turns out, the parents had already started a conversation with their daughter when they received a real-time alert on their Securly Home app.

The daughter was very frustrated with distance learning and was missing her friends. Because of the partnership between school, parents and Securly, a conversation took place before the issues the girl was experiencing became too overwhelming.

It's not yet clear what the future holds for distance learning, but the combination of Securly's Auditor tool, 24 service and Home product have helped Securly districts keep their students safe during an uncertain time.



CEO

Mike Teng

FOUNDED

2015

NOTABLE CO-INVESTORS

GV, Social Capital, Kapor Capital, Ulu Ventures, Moment Ventures

WEBSITE

www.swingeducation.com

HEADQUARTERS

San Mateo, California

FOCUS

K-12

COMPANY

Swing Education is addressing the national, teacher-shortage problem by connecting qualified, substitute teachers with schools and districts that are facing hard-to-fill teacher absences. Through its online marketplace platform, Swing is on a mission to build a community of highly qualified, substitute teachers who can respond in real time to schools that need substitute teachers.

BUSINESS MODEL

Swing has a pay-as-you go pricing model that aligns with districts' current pay rates, with no setup costs and no minimum commitment for schools.

CUSTOMER TESTIMONIAL

"It is easy to use. Jobs are accepted that morning (last minute), so we are not scrambling to cover with administrators and extra support. I have had jobs in the eSchool system for two or three days, and no one from our school's sub pool accepted the jobs. I put it in the Swing system, and someone accepts it within 5 to 20 minutes. It's awesome!"

— A Sub Desk manager



MIKE TENG

Co-founder and CEO

Mike Teng is a Co-founder and CEO of Swing. Before co-founding Swing, Mike was a software engineer at FactSet and igWare (a \$320 million exit). He was inspired by Geoffrey Canada to join the education-reform movement, and joined Rocketship Education as head of technology. Mike is an alumnus of Gunn High School.



ASHA VISWESWARAN

Co-founder and COO

Asha Visweswaran is a Co-founder and COO of Swing. Prior to Swing she had been a senior manager at Deloitte, working with Fortune 50 companies to solve technical and strategic problems. Asha is an alumna of Gunn High School.



OZ FENG

Co-founder and CTO

Oz Feng is a Co-founder and CTO. Prior to starting Swing he had been an engineer for a high-frequency-trading hedge fund. He had also been the CTO of Identified (acquired by WorkDay) and had worked with Mike at FactSet. Oz is an alumnus of Gunn High School.

“Schools are going to be a fundamental building block of our country’s response to the coronavirus outbreak. Getting students back in school safely while protecting teachers and staff as much as possible will be critical for so many kids and families. We are excited to play an integral part in helping schools get back up and running.”

– Mike Teng, Co-founder and CEO

PAIN

Districts and schools are facing a national, teacher shortage, with many last-minute and long-term teacher absences that go unfilled. In addition to financial stability, substitute teachers want the flexibility to work in various schools and districts, and don’t want to deal with lengthy application cycles and antiquated notification systems, like robo-calls.

SOLUTION

Swing Education’s online marketplace solution matches highly qualified substitute teachers with schools by building a community of pre-vetted substitute teachers, who enjoy weekly pay, flexible schedules, access to Swing’s teaching resources, and easy job scheduling via simple text messages.

PRIMARY STAKEHOLDERS

Substitute teachers and schools

RECOMMENDED PRODUCT USAGE

Educators interested in substitute teaching positions complete the registration form and background screening. Once their documents are accepted, they receive requests via text, and online. They have the flexibility to choose when and where to work, as well as how much to work, and to get paid at the end of each week.

Schools get access to Swing Education’s on-demand network of qualified educators to fill teacher absences without stress.



SWING EDUCATION BY THE NUMBERS

USAGE

4k

Filled substitute teacher days
per week

150k+

Filled substitute teacher days
per year

REACH

5m

Students

2500

Schools

7

States

ACCESS

SUBSTITUTE TEACHER
DEMOGRAPHICS

37.8%

White

26.1%

Black

15.8%

Latinx

12.9%

Asian or Pacific Islander



PRODUCT OUTCOMES

OUTCOME 1: SUBSTITUTE-TEACHER DAYS FILLED

1. **4,000** filled, substitute-teacher days per week.
2. **150,000+** substitute-teacher days filled per year.

OUTCOME 2: ON-DEMAND ACCESS TO RELIABLE EDUCATORS FOR SCHOOL

1. Placed **5,500+** teachers in **250,000**-plus classrooms.
2. Reliability rate of educator network: Greater than **99.7%**.



1 CALIFORNIA DISTRICT ENJOYS “BEST YEAR” OF ABSENCE COVERAGE

Challenges

- The substitute-teacher shortage caused classes to be combined.
- Families were upset that absences went uncovered.
- The teacher’s union wanted better, substitute-teacher coverage.

Solution

Swing Education

Results

- More teacher absences have been covered.
- Families are happy that more classes are led by quality educators.
- The teacher’s union appreciates the additional substitute-teacher support.

In April, 2017, San Leandro Unified School District implemented a new strategic plan designed to prepare its students for college and beyond.

The plan is composed of five pillars:

Teach, Learn and Achieve
Equity and Inclusion Through College and Career Readiness
Collaborative and Engaged District Culture
Family and Community Engagement
Facilities and Technology

Staffing — from the back office, to the classroom and everywhere in between — plays a vital role in those initiatives. That’s true for all administrators and educators, including substitute teachers.

About San Leandro Unified School District:

- Serves 9,000 students across 13 campuses.
- Located in the San Francisco Bay Area.
- Recently named a College Board Advanced Placement® District of the Year.

San Leandro USD administrators know that they can’t provide students the best learning opportunities without quality educators in every classroom. So, when confronted by the challenges of the substitute-teacher shortage, San Leandro USD superintendent Dr. Mike McLaughlin took action. The district partnered with Swing Education, an organization that provides substitute teachers to a wide range of California districts, to improve fill rates and provide quality instruction even when teachers are absent.

“With Swing in the picture, I can tell you this has been the best year in the six years I’ve been here,” McLaughlin says.

Getting started with Swing Education.

Like many school districts, San Leandro USD has felt the impact of the substitute-teacher shortage. It utilized a variety of strategies to recruit and retain substitute teachers, such as incentive programs, advertising, and creating a sub-friendly culture, with only limited success.

“We still found holes in trying to get substitutes,” McLaughlin says. “It was difficult, especially at the high school level, where I would go in on a Monday and we’d have a lot of kids in the cafeteria with one teacher because we could not get a substitute.”

With Swing Education, which recruits, screens and supports a large pool of substitute teachers — and makes it easy for schools to quickly fill absences — McLaughlin and San Leandro USD found a solution to the challenges of the substitute-teacher shortage. San Leandro USD uses Swing to cover teacher absences that its internal pool can’t. (With Swing, administrators can post a substitute request in 30 to 60 seconds, and fill an absence in minutes.) That’s helped the district reduce uncovered absences and unfilled classrooms.

“It’s really helping us on a day-to-day basis,” McLaughlin says.

Wide-ranging benefits.

San Leandro USD’s partnership with Swing Education has paid big dividends for the district and its community. Administrators save time on coordinating absence coverage and fill more vacancies; parents are happy their children are getting more consistent learning opportunities; and the teacher’s union likes having additional, substitute support.

“We’re not getting parent complaints about combined classes,” McLaughlin says. “The union is not upset with us (previously, I think there had been a perception that we weren’t trying to hire more subs, which we were — they just weren’t out there).”

It’s been good for students, too.

“From an academic perspective, we’re not only getting a teacher in the classroom, but the quality of substitute teachers has been strong as well,” McLaughlin says.

While McLaughlin has enjoyed a productive partnership with Swing Education, he does have one pressing question.

“When we talk about Swing in the superintendent world, a lot of us are, like, ‘How come we didn’t come up with this idea?’” McLaughlin says. “It’s very unique and very innovative, and I know that there are more and more superintendents signing up for it.”

2 MIKE TENG ON COVID-19'S IMPACT ON SCHOOLS

How would you say that COVID-19 has impacted the ed-tech landscape?

It has increased the gap between the haves, and the have-nots. The challenge for ed-tech is how to help districts respond to this in a way that creates equity, but is still aligned with for-profit businesses. It's really just an increase in the level of difficulty for everyone involved (schools, teachers, parents, students and companies).

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

We launched an online Swing Tutoring service to help teachers on our platform find more income, as well as helping students and families with keeping learning going at home

In addition, as schools have gone virtual for this academic year, many parents have turned to "pods". In response, we have started our Bubbles service to provide families with educators for at-home learning for groups of 2-8 kids.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Schools and districts will likely have less reliability from a staffing standpoint and their needs will also be more varied. They also may be dealing with tighter budgets. We believe that Swing has an integral role to play in helping districts "smooth" their staffing over the next school year in particular; that will strengthen our standing with customers as a vendor they can build a strong partnership with.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

Ed-tech companies are being given opportunities to "walk the walk" more than ever before. The silver lining is the opportunity to step up and meet districts', teachers', and students' every need along the way.

Looking back at 2020 so far, what feels like 20/20 hindsight now?

Leadership and representation matter. There's an opportunity for leadership at every level to step into any vacuum of leadership. At the same time, the more that leadership reflects the people it represents, the more equitable a world we can create.





CEO Brian Fitzgerald
FOUNDED 2014
NOTABLE CO-INVESTORS Imaginable Futures, Reach Capital, WndrCo
WEBSITE www.tinkergarten.com
HEADQUARTERS Northampton, Massachusetts
FOCUS Early Education, Outdoor Play

COMPANY

Tinkergarten helps children unlock their natural learning ability by building skills to become ready to learn, ready to thrive and ready for anything. It empowers parents to be their child’s number-one teachers, giving them their life’s most important gift: To learn how to learn. With over a decade of design and continuous improvement in the program, and hundreds of thousands of families served, Tinkergarten’s unique method of activating a child’s learning is tested, proven, and beloved. Each outdoor-play experience is engineered to marry the latest science with the wisdom of the ages and the wonder of childhood, to teach creativity, empathy, focus, and persistence.

BUSINESS MODEL

Tinkergarten finds, vets, trains, and supports teachers as they deliver outdoor play learning classes — to parents, and to children ages six months through eight years old — in the green spaces within their local communities. To date, Tinkergarten has 1,700 active teachers who offer the program in all 50 states.

CUSTOMER TESTIMONIAL

“We learned another way to play with them, to approach nature, and to ask them things like: What do you think? What do you see? Not so much telling them what they see and what they think.”

— A parent.



BRIAN FITZGERALD

Co-founder and CEO

Brian Fitzgerald has been developing high-growth, consumer digital-product businesses since 1995. Before starting Tinkergarten, he was VP of product development at Knewton. Prior to that, he had been the VP-Intrapreneur of Audible Education, where he developed products and services for higher education, K-12 and early learning. Brian was on the startup team that developed Rocketmail, and he later launched more than 50 Yahoo consumer apps while serving in leadership roles.



MEGHAN FITZGERALD

Co-founder and Chief learning officer

After 16 years as an educator, Meghan has her dream gig: An entrepreneur-educator-mom, who helps families everywhere, including her own family, to learn outside. Prior to her work at Tinkergarten, Meghan had worked as an elementary-school principal, and as a teacher in public and private schools. She earned a B.A. at Amherst College, with majors in English and psychology, and an M.S. in educational leadership at Bank Street College. She was trained as a forest-school leader at Bridgwater College, in Britain.

PAIN

In a world full of screens, adult supervision, and indoor, sedentary learning opportunities, children are missing the chance to activate a love for learning and to benefit from the curiosity and natural instincts they have to learn. Parents know it. Teachers know it.

SOLUTION

Make high-quality, outdoor learning experiences — the kind that can help children develop the skills they will need to be ready to learn, ready to thrive, and ready for anything — accessible to families everywhere.

PRIMARY STAKEHOLDERS

Parents, children, and teacher-leaders

RECOMMENDED PRODUCT USAGE

One, 75-minute session per week, eight weeks per season, four seasons per year; plus parent-education content, and family do-it-yourself-activity ideas on off-weeks to contribute to the outcome of the development of 12 essential skills.

“Since the pandemic hit, we’ve brought Tinkergarten online — live, online sessions, how-to content, and community. The response has been overwhelmingly positive — and we’ve been reaching significantly larger populations of consumers. We’re excited to continue to expand these offerings to meet this growing demand for families.”

– Brian Fitzgerald, Co-founder and CEO



TINKERGARTEN BY THE NUMBERS

REACH

265k

Students

3k+

Trained educators

50

States



PRODUCT OUTCOMES

OUTCOME 1: EMPOWER PARENTS

Empowering parents to become their child's primary teachers.

Time outdoors as a family: **86.6%** of families report that they go outdoors more often as a direct result of Tinkergarten.

Parent Learning: **92.9%** of parents enrolled report that they gained new ideas for ways they can engage their children in play; **82%** learned more about how young children learn as a direct result of Tinkergarten.

OUTCOME 2: SUPPORT LEARNERS

Increased focus: **84.5%** of parents observed that their children are more focused during their outdoor play.

Increased agency: Enrolled parents report that children play more independently (**61.8%**) and for longer (**67.8%**) as a direct result of Tinkergarten.



1 EVERYDAY IMPACT TESTIMONIALS

IMPACT ON LEADERS:

“It was not until I met Calvin, a three-year old explorer, that I understood the depth of what Tinkergarten can do. He spent the first few classes hiding behind his guide’s leg. I reassured his mom that he was welcome to experience the class in any way that he saw fit. It was not until week five that something shifted. When we sang a song, he looked directly at me and said his name for the first time. Because of the structure of Tinkergarten, where a child can dictate his or her own way of experiencing each lesson, huge social and emotional growth happened for Calvin. It is because of my season with him that I realized that seemingly small moments can make a huge impact in the life of a child and his family.”

IMPACT ON PARENTS:

"Michael's 'learning' has never looked the same as other kids. He has always been strong willed and completed milestones on his own timeline. Since he has started Tinkergarten I have noticed some different play behavior. At home he is very much into digging, filling and pouring (I think from the mud class)! I also noticed him trying to make a bridge with his cars and a plate (like the balance and pulleys). I plan to incorporate some more of the skills from class and start singing in our play as you suggested! Thank you Tinkergarten!"



2 INTERVIEW WITH TINKERGARTEN ON COVID-19

How would you say that COVID-19 has impacted the ed-tech landscape?

- Parents as educators became a lot more important overnight.
- The rise of homeschooling, “unschooling,” and other, hybrid solutions has emerged.
- Additional enrichment has become the “new normal.”

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

In response to COVID-19, we launched three initiatives:

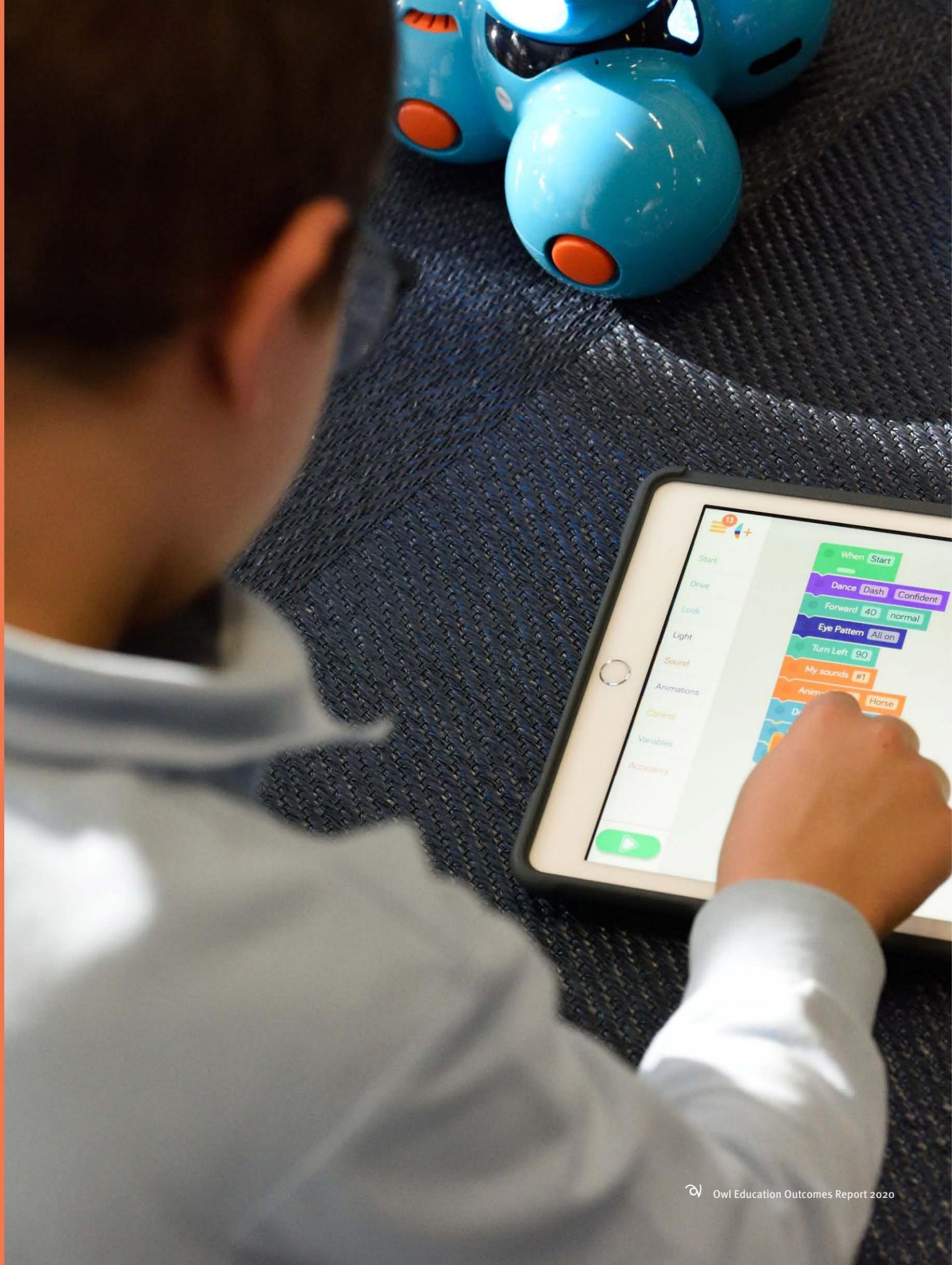
- Tinkergarten At Home, which is our weekly program, full of free, at-home activities, online support, and virtual Tinkergarten.
- Camp Tinkergarten, which is eight weeks of expert-designed activities that are easy on parents and enjoyable for kids. This is our way of helping kids discover how to keep cool, enjoy a Silly Summer Olympics, and more.
- Online circle time, with a goal to keep kids connected to each other and the outdoors. These are weekly sessions, where a certified Tinkergarten leader guides the group through an interactive experience filled with songs, movement, sharing and play.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Spending time, having access to the outdoors, and in-person socialization and community have become a lot more essential.

Could you provide a couple of examples of the early impact that you’re seeing as a result of your COVID-19 efforts?

We have significantly greater reach than before, given our efforts online. Tinkergarten-as-a-service is becoming more and more “essential” to make it through the day, week, etc.



CEO Karan Bajaj
FOUNDED 2018
NOTABLE CO-INVESTORS Nexus Venture Partners, Omidyar Network
WEBSITE www.whitehatjr.com
HEADQUARTERS Mumbai, India
FOCUS Coding curriculum, STEM

COMPANY

WhiteHat Jr (acquired by BYJU'S) is a Mumbai-based, ed-tech startup that focuses on teaching coding to young kids. The online platform lets children learn programming. They are then encouraged to create games, animations and applications.

BUSINESS MODEL

WhiteHat Jr sells directly to its end customers: parents of young kids.

CUSTOMER TESTIMONIAL

“An incredible experience! My 10-year-old had a blast creating her first app, and my seven-year-old loves the challenging activities in each class. A must for kids to learn logic and algorithmic thinking for deep creative expression.”

— Amy Memon, mom, and business Executive.



KARAN BAJAJ

Founder and CEO

WhiteHat Jr was founded by bestselling novelist and Discovery Networks India ex-CEO, Karan Bajaj.

“As a father of two daughters, I was aware of the massive shifts in every aspect of living caused by technology, and wanted my kids to be at the center of creating technology, versus consuming it. So, I read about early childhood coding from MIT and Tufts University. Interestingly, the research indicated that kids who code go through a fundamental psychological shift when they use the fundamentals of logic, sequence, structure, and algorithmic thinking to create tech products such as games, animation and apps. And that’s when I thought of creating WhiteHat Jr, with an aim to empower the next generation to become creators, versus consumers of technology.”

– Karan Bajaj, Founder and CEO

PAIN

Today, in the computer age, less than 1% of schools teach coding during early childhood.

SOLUTION

WhiteHat Jr provides coding courses for kids between 6 and 14 years of age, to prepare them for the technologies that will dominate the workforce in the years to come.

PRIMARY STAKEHOLDERS

Students

RECOMMENDED PRODUCT USAGE

WhiteHat Jr is a web-based system, much like a virtual classroom with a one-to-one teacher-to-student ratio. A kid books a session online, which then connects them to the instructors for a 45- to 60-minute session. A student can take as many as 300 classes during the course, with the minimum being eight classes on the platform.



WHITEHAT JR BY THE NUMBERS

REACH

45k

Classes held on a weekly basis

700k+

Students

3

Countries: India, United States,
Canada

ACCESS

50%+

Customers are from India's Tier II and
Tier III cities

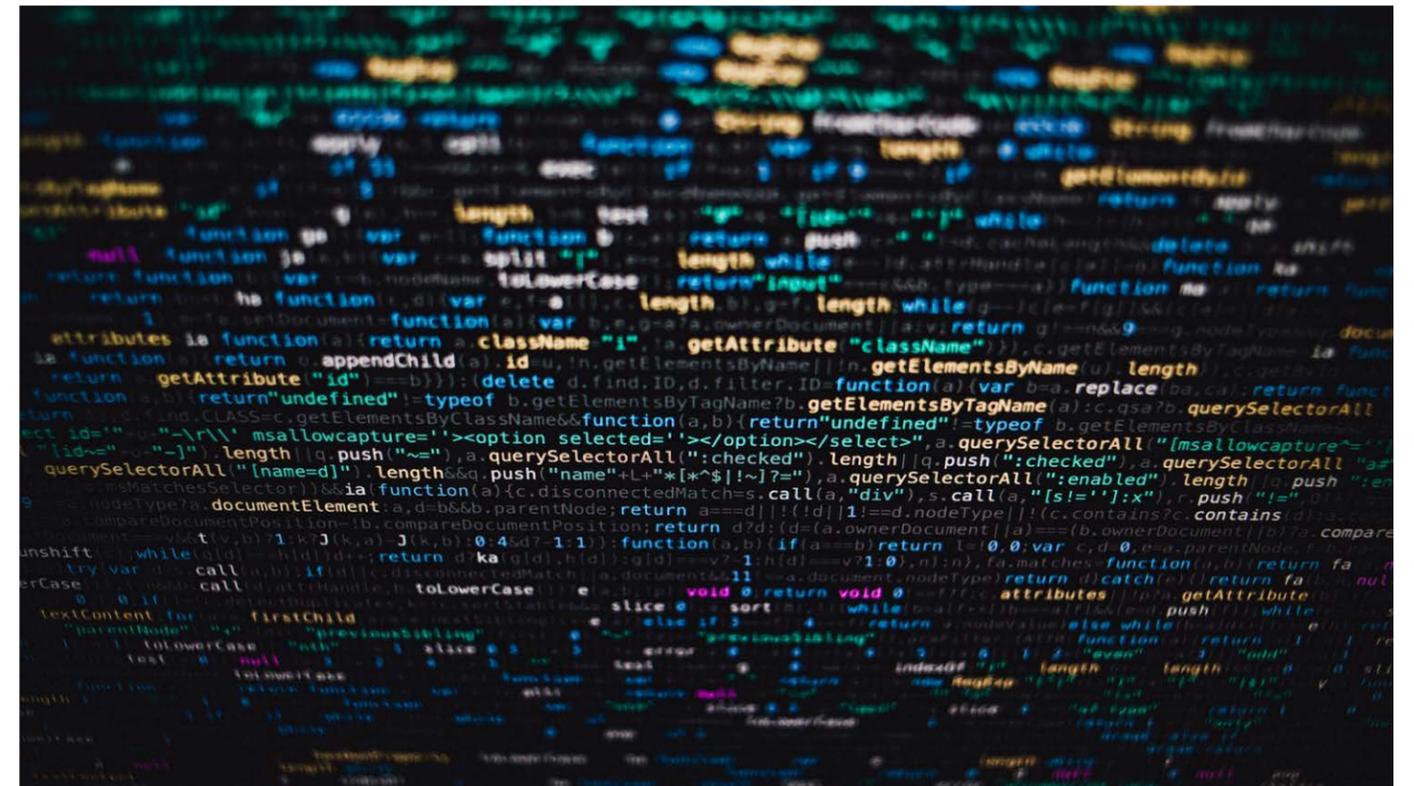
PRODUCT OUTCOMES

OUTCOME 1: CREATE MORE CREATORS, RATHER THAN CONSUMERS

More kids learn logic sequencing and coding to ultimately develop apps.
Metric: Total projects completed: **1 million-plus.**

OUTCOME 2: ENGAGE KIDS IN HIGH-INTEREST, HIGH-QUALITY CODING CURRICULUM

NPS score: **68%**
Student renewal rate: **75%+**



1 THESE KIDS ARE CREATING APPS FOR BASIC STUDENT NEEDS NO ONE THOUGHT OF

DYSLEXIA APP

Dyslexia is one of the most common learning disabilities in children. According to the report by Dyslexia Assessment for Languages of India, and India's Ministry of Health and Science, one in six children has reading problems, and there are nearly 350 million children with dyslexia studying in schools in India.

The disability makes it difficult for children to learn in a regular classroom setting. To tackle this situation, eight-year-old Souradeep Sarkar from Burdwan has created the DYSXA app, a learning-aid app for dyslexic kids that enables them to learn alphabets and numbers. Dyslexia has a biological basis and it occurs because of differences in "brain wiring."

Once logged in, the app aids in learning, and forming words. It has an animation for words (like birds, pictures of objects, etc.), and pronounces a word to help kids learn the pronunciation of a word fed into the app. The app has a separate color and sound for each letter, and it quizzes to help kids practice and identify the correct word or spellings.

ANTI-BULLYING APP

Another example is nine-year-old Mae Mae from Shillong, who has created the Anti-bullying app, for kids to report bullies anonymously, and to alert their parents, teachers, and friends about them.

Mae Mae and her sister had faced bullying at school, and she wanted to put an end to this.

While learning to code on the WhiteHat Jr platform, Mae Mae thought of using her learning to create an app to help other kids cope with bullies.

Once logged in, a child can anonymously share details of an incident, including the name of the bully, and give a

detailed explanation on how they were mistreated. This will notify their parents and teachers and encourage them to take necessary disciplinary action to nip the problem in the bud.

LIGHT BAG APP

A 16-year-old boy, Jishnu Baruah, from Dibrugarh, Assam has created the Light Bag app, which allows kids to shed loads from their school bags. While going to school, he saw kids struggle with carrying heavy bags to school every day. He got the idea to create the app.

With the help of WhiteHat Jr, he made the app, which allows teachers to update the name of the books and notebooks they want the student to carry on a specific day.

The app provides an estimate of the weight in the student's bag and shows animations to the teachers to convey the student's discomfort, depending on the weight of the bag. Based on the weight calculations, teachers can reduce the number of books so that students can carry lighter bags to school.

2 KARAJ BAJAJ, CEO OF WHITEHAT JR, SHARES HIS THOUGHTS ON HOW COVID-19 HAS IMPACTED HIS BUSINESS

Karaj Bajaj, CEO of Whitehat Jr, shares his thoughts on how COVID-19 has impacted his business. These excerpts have been taken from different news articles.

"We were earlier growing at 40%, month-on-month. Since the lockdown, this has accelerated to 100%, month-on-month. We're also hiring aggressively to increase capacities, get more teachers on board, and conduct more daily classes for the students. We're currently looking to onboard 2,000-plus teachers and 400 employees every month, to supplement the increasing student base."

"In addition to metro cities, WhiteHat Jr is seeing great traction from Tier II and Tier III cities, which substantiates the fact that coding is fast emerging as a viral phenomenon among kids and parents in our country."

"The company also did a pilot launch in the United States earlier this year. The U.S. business is growing at more than 200% each month. This has now given the company the confidence to scale up business in major global markets, too."



POST SECONDARY

BenchPrep

Kuali

Labster

Noodle Partners

Rafr





BenchPrep

CEO	Ashish Rangnekar
FOUNDED	2009
NOTABLE CO-INVESTORS	Revolution Ventures, Jump Capital, NewView Capital, Lightbank, New Enterprise Associates (NEA)
WEBSITE	www.benchprep.com
HEADQUARTERS	Chicago, Illinois
FOCUS	Associations, credentialing bodies and professional training companies

COMPANY

BenchPrep is a configurable, cloud-based learning platform that delivers the best learning experience for students and drives revenue for nonprofits (credentialing bodies and associations), corporations and training companies. With an award-winning, learner-centric platform, BenchPrep increases learner engagement, improves long-term learner retention, and reduces dropout rates. The platform's omnichannel delivery model incorporates personalized learning pathways, robust instructional design principles, gamification, and near-real-time analytics that allow organizations across all industries to achieve their goals.

BUSINESS MODEL

BenchPrep's core markets are nonprofits (credentialing bodies and associations), corporations and training companies.

CUSTOMER TESTIMONIAL

"BenchPrep's commitment to learner success, and its desire to improve outcomes, align perfectly with our organizational goals," says Brandon Goldsmith, senior product manager at ACT. "That was a significant factor for ACT in deciding to begin this partnership, and it has been truly gratifying to see the impact we've had on learners from various backgrounds."



ASHISH RANGNEKAR

Co-founder and CEO

Ashish Rangnekar is the co-founder and CEO of BenchPrep. As CEO, Ashish helps leading education and training organizations to redefine their learning strategies, and spurs their digital transformations to maximize engagement rates and revenue opportunities.



UJJWAL GUPTA

Co-founder and COO

Ujjwal Gupta is the co-founder and COO of BenchPrep. Ujjwal’s mission is to ensure that BenchPrep remains a progressive organization that prioritizes work-life balance, while combining BenchPrep’s employees’ passions with a fun working environment. His efforts have helped BenchPrep to be recognized as one of the best places to work in Chicago by Built in Chicago and Crain’s Chicago.

“When Apple opened the iPhone platform to developers, there were no apps that addressed the problems I had as a student, lugging around heavy GMAT textbooks. I brainstormed with Ujjwal and we decided to build our own solution — a GMAT test prep app that could help on-the-go students study. We scaled it up to 50 apps, with each one helping students study for tests like the SAT, GRE or LSAT. We won the University of Chicago’s Booth New Venture Challenge. After that, we closed our Series A and stopped looking at BenchPrep as a side hustle and started building a company.”

– Ashish Rangnekar, Co-founder and CEO

PAIN

Associations, credentialing bodies and professional training companies need to grow learning portfolio revenue and advance their organizations’ missions by offering their learners a comprehensive, differentiated learning product in a competitive market. In addition, many of these companies are seeking new and better ways to engage learners and build their businesses beyond point-in-time, transactional learning products.

SOLUTION

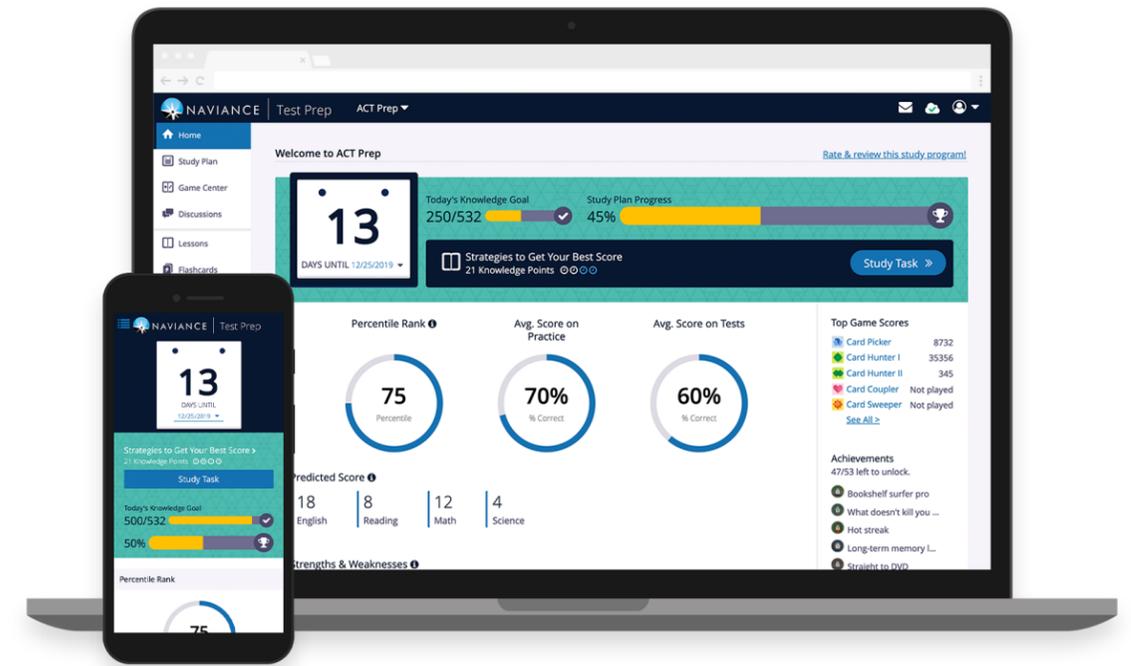
BenchPrep’s platform helps customers solve problems and drives value in several different ways. First, the flexibility of the BenchPrep solution allows them to configure the platform to the exact needs and specifications of their customers and their customers’ learners, which is key to providing the best learner experience. Next, their solutions facilitate learner success through features, like adaptive study plans, personalized learning pathways, and actionable strengths and weaknesses, allowing learners to more efficiently study; and adding maximum value to the customers’ learning programs. Finally, they help their customers uncover relevant information needed to make better business decisions and build more revenue through advanced analytics and reporting.

PRIMARY PRODUCT STAKEHOLDERS

Learning-program leaders, content managers, students, teachers, employers, employees

RECOMMENDED PRODUCT USAGE

BenchPrep’s platform is designed to have an immediate impact on learners through well-timed reinforcement of knowledge and targeted interruption of the forgetting curve. BenchPrep’s competency-based, e-learning framework emphasizes the acquisition of concrete skills, so participants know they are prepared to face the unforeseeable test questions and real-world scenarios that await them. BenchPrep lets people learn anywhere, at any time, by synchronizing user progress across devices and operating systems through a responsive webapp and available, branded, native iOS and Android applications. In addition, we make sure users get personalized pathways through their learning programs. While learners are gaining new levels of understanding on our platform, they’re getting focused, timely feedback about their growing strengths, and facing the exact challenges that suit them. The result is that learning the same material feels more like honing a skill or playing a game — and less like studying.



BENCHPREP BY THE NUMBERS

USAGE

38k+

Average weekly users

ACCESS

88%

English language learners

REACH

6.4m+

Students

22k+

Educators

39k+

Schools

7k+

Higher-education institutions

6.9k+

Employers

222

Countries

PRODUCT OUTCOMES

OUTCOME 1: ELEVATE EVERY LEARNER'S POTENTIAL THROUGH HIGHER SUCCESS RATES

- **32%** higher practice-exam scores for students who use ACT Online Prep extensively.
- A **2.64%** average score gain for students who use ACT Online Prep optimally.

OUTCOME 2: CREATING MORE REVENUE

In the case of CompTIA there was:

- A **20%** increase in revenue in the first year, CompTIA.
- **100%** more revenue than expected since program launch.

OUTCOME 3: INCREASE ADOPTION

- **81%** increase in platform users for McGrawHill.

1 HRCI AND BENCHPREP JOIN FORCES

HRCI and BenchPrep join forces to create a smoother, more successful certification process.

CHALLENGE: Improving the candidate journey.

How can credentialing organizations support candidates so they show up for their exams, confident and ready? These professionals often spend countless hours learning about, and preparing for the certification process, from considering licensing options, to poring over exam materials. Without the right support through tools that provide a path to success, candidates can become overwhelmed and drop out of the process, deciding not to take the test at all.

This “candidate journey” has received a lot of attention at HR Certification Institute® (HRCI), which supports professional advancement by developing and administering best-in-class certifications, including the Professional in Human Resources® (PHR) and Senior Professional in Human Resources® (SPHR). For 40 years, HRCI has set the standard for HR expertise and excellence around the globe.

With an eye toward improving the customer journey, HRCI set out to provide its customers with additional resources to help learners feel more prepared when exam day arrived. Since most of its customer interactions revolved around the exam itself, HRCI also saw an opportunity to strengthen connections and support professionals throughout their careers.

SOLUTION: Personalized learning for every professional.

While HRCI does not endorse a particular resource, provider, or method of study, the organization knew that selecting an exam-preparation method could feel overwhelming to new customers. To provide its customers easier access to various certification-preparation providers’ offerings, HRCI partnered with BenchPrep. As the industry’s first, learner-success platform, BenchPrep offers personalized, on-demand exam preparation to

improve participation and competency for more than 3 million learners worldwide.

BenchPrep’s focus on the learning experience resonated with HRCI, which wanted to ensure that candidates stayed engaged while they prepared for certification exams. The cloud-based platform is accessible on web or mobile to help candidates maximize study time, with personalized dashboards and real-time feedback, pinpointing strengths and weaknesses. While BenchPrep’s platform delivers meaty educational content, like retired questions from previous certification exams, it features games, achievement badges, and collaboration with other learners to make learning more fun. BenchPrep also provides an enterprise-grade platform, which helps to power exam prep for some of the world’s leading credentialing organizations.

“BenchPrep’s partnerships with other, large credentialing bodies gave us the reassurance that they could scale with us as we continue to grow our own programs. We also quickly realized their dedication and commitment once we started interacting with their responsive and collaborative customer-success and development teams.”
— Dania Eter, MBA, chief global credentialing and products-portfolio officer at HRCI.

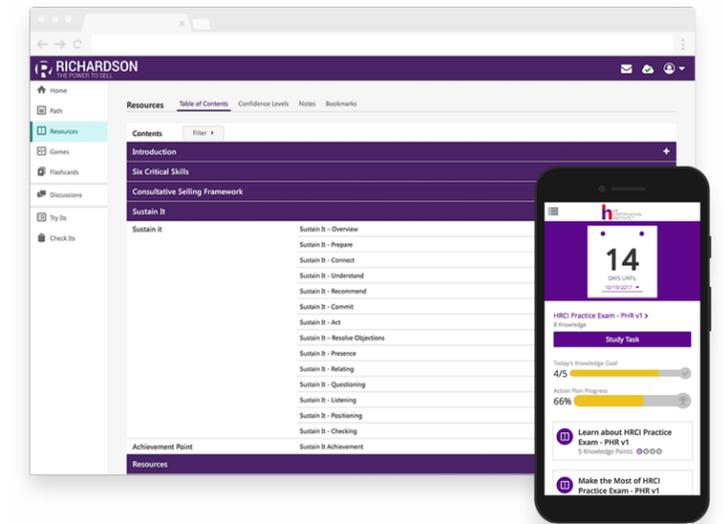
In May 2015, HRCI debuted its “build your own bundle” program on the BenchPrep platform. The bundle program allows candidates to register for exams, and to purchase with one click voluntary study and prep materials offered by external providers at reduced rates, helping them save time and money while taking a critical step toward preparing for exam day.

RESULTS: Building a better path with bundles.

Since launching the Professional in Human Resources and Senior Professional in Human Resources certification program bundles for HRCI in 2015, BenchPrep has added HRCI practice exams for all HRCI certifications.

BenchPrep’s turnkey platform and hands-on support help to simplify new launches, allowing HRCI to add prep courses easily as candidate needs evolve. Throughout their partnership, BenchPrep has enabled HRCI to facilitate:

- **More prepared candidates:** By combining pedagogically robust content with an engaging approach, BenchPrep is helping HRCI reduce candidate anxiety and improve readiness.
- **More long-term relationships:** The bundle program offers candidates a one-stop shop for exam preparation and certification, helping HRCI to become more tightly ingrained in the candidate journey, and encouraging candidate follow-through. Professionals who use the bundle program are less likely to drop out of the certification process, HRCI reports.
- **More stable growth:** Adding bundles to the exam-registration process has created a new stream of high-margin revenue that HRCI can use to support its mission. BenchPrep’s powerful reporting tools also give HRCI a window into how learners and courses are performing, so it can continue to evaluate external certification-preparation providers to include in the bundled offerings.



2 IN CONVERSATION WITH ALEX MAURITZ, RESEARCH LEADER AT BENCHPREP

How would you say that COVID-19 has impacted the ed-tech landscape?

The COVID-19 situation has catalyzed many organizations to modernize the way they do business, add new sources of revenue, and set themselves up for long-term growth by taking their learning products digital for the first time. Many organizations had been holding off on going digital, since it would be such a dramatic change to their business models and organizations, but the risk of losing critical revenue allowed them to accelerate their digital transformations.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

BenchPrep's Quick Start Program was designed to help organizations with COVID-19 restrictions move to a digital-first model. Quick onboarding, simple contracting, and straightforward pricing help our customers quickly transition their in-person training.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

One of the bigger challenges is that learning organizations want to maintain the same level of engagement and the unique aspects of their in-person courses that have allowed them to be successful. This has had a positive impact on BenchPrep since organizations are able to customize their course material and design a learner experience that is in line with their learning philosophies.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

Organizations' accelerated adoption of ed-tech has gotten a significant number of organizations to make commitments that will help their business in the long run, increase access to education, and provide a more-enriching learning experience.





kuali

CEO Joel Dehlin
FOUNDED 2014
NOTABLE CO-INVESTORS Mercato Partners
WEBSITE www.kuali.co
HEADQUARTERS Lehi, Utah
FOCUS Higher-education administrative tools

COMPANY

Kuali began in 2004 as a nonprofit, open-source community initiative for developing higher-education administrative systems that provided better long-term alternatives to what was available. Founding members included Indiana University, the University of Arizona, the University of Hawaii, Michigan State University, San Joaquin Delta Community College, Cornell University, and the National Council for College and University Business Officers. In 2014, Kuali, Inc. was created to focus efforts on accelerating software development, improving the Kuali user experience and bringing Kuali products to the cloud. Today, 211 institutions are using Kuali’s open, modular, cloud-based software.

BUSINESS MODEL

Kuali currently offers higher-education institutions five different products.

CUSTOMER TESTIMONIAL

“Built on cloud-native technology, Kuali Build empowered us to explore Rapid Application Development initiatives; most recently, having built a good portion of the user interface for an application allowing our office of budget and planning to budget and project tuition revenue for the upcoming budget year. The agility and flexibility offered by a truly, cloud-first solution allow for application versatility, cloud-based integrations into Google sheets, and often bimonthly product enhancements, without costly on-premises upgrades.”

— Tom Amerman, University of Michigan.

POST SECONDARY



JOEL DEHLIN

CEO, Co-Founder, President, Student and Build

Joel Dehlin is the CEO and co-founder of Kuali. He has held CTO or CPO positions at a variety of companies, including Instructure. Joel loves to snowboard, play guitar, and spend time with his kids. He chairs the board for the nonprofit, Utah Ultimate Disc Association.



CHRIS COPPOLA

President, Financials, Research, and Ready

Chris Coppola, president at Kuali, has nearly two decades of experience working with education technology, including co-founding multiple companies and open-source communities. He is an expert leader, serving in a C-level position at three different education-technology organizations over the course of 18 years.

PAIN

Higher-education institutions need modern, cost-effective ways to implement IT services, without the burdensome cost of maintenance and upgrades. Colleges and universities struggle to realize the full potential of their data, inhibiting them from making better-informed strategic decisions and improving their ability to serve faculty and students.

SOLUTION

Kuali is making it simpler for higher-education institutions to make the transition to the cloud by offering them the ability to deploy best-of-breed modules one at a time, combined with much lower implementation costs.

PRIMARY PRODUCT STAKEHOLDERS

CFO, VP Research, provost, registrar, CIO at higher-education institutions

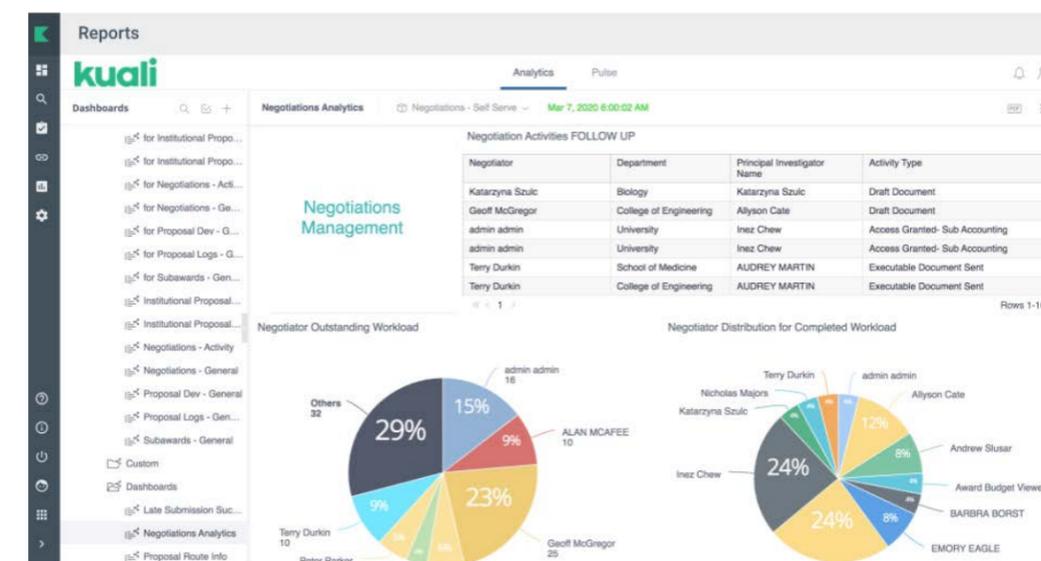
RECOMMENDED PRODUCT USAGE

Kuali Curriculum and Catalog Management is an easy-to-use and powerful solution for institutions to streamline and efficiently manage the curricular planning, development and approval process, and to dynamically build and publish the institution’s catalogs. With Kuali, there’s one place to keep curricular data synchronized across the campus software ecosystem — eliminating double entry, increasing visibility, ensuring data accuracy, and delivering insights. Approved curriculum dynamically builds catalogs for on-demand publishing, on the web, or in print, and optimized for student use. Kuali is flexible to account for any complexities, built for, and hosted in the cloud, secure, accessible, and mobile-ready.

Kuali Ready: Customers need to build out plans that have documented critical functions that allow them in a recovery to assess what critical functions have highest priority in each phase of their planning. Ready allows for users to manage and receive this data in reporting as well as assembling a continuity plan that can be shared and managed institution wide.

“Positive outcomes come from motivated people. People are motivated at work when they feel like they have opportunities for mastering skills, and feel a sense of purpose and autonomy in their work. We built the principles of mastery, purpose, and autonomy into the DNA of the company to create a motivating environment at Kuali.”

- Joel Dehlin, CEO, Co-Founder, President, Student and Build



POST SECONDARY

KUALI BY THE NUMBERS

USAGE

2.5k+

Kuali Build: New submissions per week in June 2020

425k+

Kuali Curriculum and Catalog Management: Total documents created

REACH

47.8k+

Users

29k+

Educators

36

States

3

Countries

157

Public colleges

40

Private colleges

PRODUCT OUTCOMES

OUTCOME 1: PROPOSALS SUBMITTED

- 2020 year-to-date, the Kuali Research system has been used to create, approve, and submit more than **18,000** grant proposals, representing more than **\$143 billion** in requested funding for academic and medical research.

- More than **200,000** paper forms have been eliminated since the start of 2020, with the use of Kuali products.



1 THE UNIVERSITY OF HAWAII SYSTEM

SUMMARY

Approvals often get buried in an inbox. With automated approvals in Kualu Build, the University of Hawaii reduced its lengthy, inconsistent approval process to under 24 hours. Not only can the university complete standard IT approvals faster, but in times of crisis, rapid approvals facilitate a quick and seamless response.

PROBLEM

C-level executives receive hundreds of emails every day. Garret Yoshimi, VP of IT and CIO at the University of Hawaii, is one of those executives, receiving 500 to 600, to be exact. A select few of those 500-plus emails are highly important, time-sensitive requests. It doesn't take long for important emails to get buried, making it difficult for Yoshimi to keep up with approvals.

Approvals get buried under junk mail, and additional requests often introduce significant delays. When the approver wants to make a change to the original request — like updating the language in a document, or pushing back on the pricing of an upcoming purchase — the request becomes buried in a long thread of email conversation. In addition, attachments, like receipts or documents, are easily lost in the back-and-forth. Yoshimi and other leaders at the University of Hawaii needed a better way to manage approvals.

SOLUTION

Using Kualu Build, Yoshimi automated the approval process. He now receives time-sensitive requests through Kualu Build, instead of directly via email. Yoshimi can quickly review and approve requests through email notifications, or simply log into Build via single sign-on, and quickly act on each outstanding request.

Now, Yoshimi can easily see the approval process, find attached relevant documents, and see where the process is lagging. Yoshimi now has the ability to send a request

back to a specific step in the workflow. Rather than sorting through a long email thread, the workflow process appears clean and simple in Build, showing exactly where the approval sits in the process and how long it has been there.

RESULTS

Since automating approvals with Kualu Build in late 2019, the University of Hawaii has processed over 500 approvals and decreased the approval process from upwards of several weeks, to less than 24 hours.

“We’ve created turnarounds that rarely exceed 24 hours and, in many cases, are under two hours because it’s a really quick click for me to review and approve.”

— Garret Yoshimi, VP of IT and CIO, University of Hawaii.

The University of Hawaii saw immediate benefits after implementation. Quick approvals became imperative as the early effects of COVID-19 hit higher education. Requests flowed through the IT department with ease as Hawaii executed its pandemic-response plan.



2 HOW IT'S PRIORITIES AND ROLE WILL SHIFT, POST-COVID-19



Prior to COVID-19, what were your priorities, and how have those changed?

At the University of Hawaii, priorities were centered around enterprise systems. The existing focus centered around incremental improvements to make systems more functional and easier to use. At the same time, there was a parallel movement to implement online courses. When the pandemic hit, institutions everywhere, including Hawaii, made “a survival pivot,” according to Garret Yoshimi.

Hawaii weathered the first wave of the pandemic shift very well. Students finished courses, and graduated.

Looking forward, there are plenty of opportunities for the institution to improve. Important changes need to happen across the institution. CIOs have the opportunity to “sit front and center in your organization and make that happen,” said Yoshimi.

For Rui Guo at the University of Alabama Huntsville, facilitating remote work became the immediate priority. And Guo’s team has its work cut out for it — million-dollar research equipment and hazardous chemicals cannot go home with research folks.

From a consulting perspective, Matthew Fern of Harvard Partners shared that there were two main themes in higher-education IT before COVID-19: digital transformation (with an emphasis on the cloud), and cybersecurity. Since the onset of COVID-19, digital transformation has all but monopolized the focus of IT leaders.

“What you did is a true miracle. The technology that you implemented was the solution to a very big business problem.”

— Michael Fern, CIO, Harvard Partners.

Fern added that some of the peskiest problems for higher education, in the move to remote work and remote learning, were answering phones, and faxing. Those processes didn’t come up in continuity-planning or disaster-recovery conversations because most continuity exercises focus on a one-day event.

Now that those processes are exposed, departments are focusing on how to automate them in preparation for fall. The biggest question on everyone’s mind is, “How can faculty, staff, and students collaborate and get their work done, no matter where they are?”

Budgets will be affected by COVID-19. How are you taking that into account as you look toward the fall semester?

Public institutions have two opportunities, Yoshimi said. First, prepare for a very different financial environment than what you see today; and second, academic research is a huge funding opportunity.

Guo, who works primarily on research-IT projects, noted that research continues, but not without hiccups. The remote-work requirement caused a long pause in research, and the facilities that house expensive equipment and materials are just beginning to open up again.

As for private institutions, much depends on their endowments.

Public or private, all institutions can limit spending and look at this situation as an opportunity. Now is the time to show how valuable IT investments are.

Is remote work temporary or here to stay? And what impacts will that have on the IT structure?

While it’s too early to say definitively, Yoshimi suspects that much of the Hawaii system will continue with remote work. A large part of the organization is running just as well as it had been from the office. If institutions opt to stay remote and offer more remote instruction, the IT structure may shift to respond to new demands.

It’s important to note that, “centralized IT versus non centralized IT,” is a long-standing question in IT structure. Fern believes it will stay centralized in the short term, but institutions should plan for a hybrid environment. Faculty, staff and students will come back to campus in waves. IT should position itself now to respond to those upcoming shifts.

“How do we, in IT, position ourselves for what comes next? I think it will all be about getting ahead of business problems.”

— Michael Fern, CIO, Harvard Partners.

Might this event set the precedent for IT to have a stronger voice?

At some institutions, like the University of Hawaii, IT already sits at the executive level. Now is the time to reinforce the value of IT by demonstrating its ability to respond.

At other institutions, like the University of Alabama, IT has been given a stronger voice since the pandemic's onset. Pre-COVID-19, top-level management gave IT directions. Now, those individuals are turning to IT, asking, "What do you think we should do?"

If IT wants a stronger voice in the future, it must have the right mindset today as it wades through the crisis.

"This is a business event, and IT was ahead of it," Fern said. "IT has to learn that we are business people. We aren't just technologists."

What advice would you give to teams who have had to significantly shift their approach to working with business?

From Fern's point of view, COVID-19 is providing both the opportunity, and the push to be more involved in the business of higher education. IT staff should think, "What can I do," rather than, "What can we do." Think about how you, as an individual, can make a difference.

And don't be afraid to make mistakes. As a leader, allow your people to make mistakes. "If you don't take action," Yoshimi said, "you'll never affect change."

Encourage business units to help IT to help business units. Many IT departments face a hiring freeze as their workload doubles. Work smarter, by encouraging collaboration and connection with business units, and you might be surprised at how much can be accomplished.

"The business units are absolutely willing to engage and collaborate with us in this process."

— Garret Yoshimi, VP of IT and CIO, University of Hawaii.

What recommendations would you give to junior IT personnel with long-term career aspirations of becoming a CIO or Director of IT?

Yoshimi encourages engaging with the business side earlier, instead of "hiding behind a computer terminal." Collaborating with business users is a must-have skill at the CIO level. And collaboration is more than creating training documents. It looks like not waiting for the user to get project requirements right before you work on something for them. Instead, engage.

Fern suggests junior IT staff stop worrying about the technology and start connecting with those around you. Actively work toward thinking about how you can make people's lives better and increase efficiency.

Guo gives two recommendations: Look for learning opportunities and, when you see a problem, keep following up until it is solved. Looking back, he thinks IT could've been in a better position in the crisis, if he had been persistent in getting upper-level management support to resolve minor problems.

What is one resource tool or recommendation that you want people to consider?

Consider using Quali Build. "Build (or a tool like it) is very empowering for an organization," said Yoshimi.

"Not just the technical side, but also the business side of the organization."

Use forums to learn from others. Things like this webinar, or forums hosted through EDUCAUSE are rich with information. Harvard Partners regularly uses forums to understand what's next for higher education.

And finally, use search engines. They can help you find forums, answer technical questions, and more.





Labster

CEO	Michael Bodekaer
FOUNDED	2012
NOTABLE INVESTORS	Balderton, Northzone, EduCapital, Entangled, David Helgason (Unity Founder)
WEBSITE	www.labster.com
HEADQUARTERS	Copenhagen, Denmark
FOCUS	Laboratory simulations

COMPANY

Labster is an ed-tech company, dedicated to the development of online, virtual courses and degrees for teaching STEM globally. The primary product is an easily scalable online platform, with a large content catalog (immersive, 3D, virtual lab simulations) covering several fields within the sciences. Labster's virtual lab simulations have, in multiple research studies, demonstrated improved learning outcomes, increased student engagement, and helped educational institutions to save millions of dollars and reduce faculty workloads.

BUSINESS MODEL

Labster offers online-learning tools to high schools, universities and colleges. The highly immersive, 3D, virtual lab simulations are subscription-based (either school- or student-paid), with access available on a per-course or per-year basis. Labster integrates with core learning-management systems to allow seamless access for students and to track learner results.

CUSTOMER TESTIMONIAL

"After implementing Labster, the failure rate dropped from 20% to 5%, and more students were finishing the simulations."

— Dr. Cindy Malone, California State University Northridge



MICHAEL BODEKAER

Co-founder and CEO

Michael Bodekaer is both an ed-tech innovator, and a multi-disciplinary academic, with a desire to bridge the gap between rapid technology innovation and the learning sciences. His background includes McKinsey & Company, and an M.Sc. in finance and strategic management. He is a self-taught software-platform architect and, prior to Labster, he founded three, successful technology companies.



MADS BONDE

Co-founder and Chairman

Mads Bonde’s impressive academic background includes stints at Harvard University as well as a doctorate in synthetic biology and bioinformatics, the interdisciplinary field that combines computer science and biology to create innovative solutions, such as Labster’s Laboratory simulations. He was also appointed to the role of honorary associate professor at Copenhagen University, to conduct research in laboratory simulations, learning psychology, and bioinformatics.

PAIN

The need to train more scientists has never been greater, but science education faces a host of major challenges. This includes high dropout rates, high levels of student disengagement, poor conceptual understanding, significant costs, limited laboratory access, and huge knowledge gaps between stronger and weaker students. On top of all of this, the COVID-19 pandemic has hit science programs especially hard because of the critical need for hands-on, laboratory-based learning for key science topics.

SOLUTION

Labster’s virtual laboratory simulations deliver efficient and engaging science learning at scale. Every learner has access to a million-dollar virtual lab, equipped with the latest technology, where they can make mistakes in a safe environment and “learn by doing” from anywhere in the world. Each of Labster’s 140-plus simulations is a powerful, self-contained learning experience featuring true-to-life missions, 3D animations, interactive tasks, quizzes, and theory material. This makes these web-based simulations fun, engaging and effective ways of learning science.

PRIMARY PRODUCT STAKEHOLDERS

Teachers, students, instructional designers, and administrators at colleges, universities, and high schools.

RECOMMENDED PRODUCT USAGE

Professors and teachers who integrate Labster into their teaching syllabus by assigning specific virtual labs see the greatest impact on student learning. Students access the simulations through their learning-management system, or directly through the Labster website. They can play and replay the simulations as many times as they like — repeating experiments, changing variables, and reinforcing key lessons with each new attempt.

Based on past surveys and research, educators see the strongest outcomes when they introduce Labster as a mandatory, graded, course assignment. The instructor can monitor student progress on a regular basis to track outcomes and ensure that students are keeping up with the assignments each week. Regular monitoring of student progress and grades also allows teachers to stage learning interventions in key topic areas where students might be struggling.

“Labster’s mission has always been to empower the next generation of scientists to change the world. When has the need for this ever been clearer than it is right now? Every student deserves access to a great education, and for science, that means high-quality labs. I’m grateful to see how we’re helping to keep science programs up and running all over the world during these difficult times, but I’m even more excited about how Labster will continue to fundamentally change the way that science is taught in the future.”

- Michael Bodekaer, Co-founder and CEO



POST SECONDARY

LABSTER BY THE NUMBERS

USAGE

18+

Science courses offered

50k+

Simulation plays each week over the past 12 months

300k+

Simulation plays each week in June 2020 alone

REACH

3m+

Students

25k+

Educators

1k+

Higher-education institutions

3k+

Schools

150

Countries

PRODUCT OUTCOMES

OUTCOME 1: EQUAL ACCESS

DESCRIPTION: One way Labster measures the scope of its impact is by tracking the total number of academic institutions that have been exposed to Labster simulations, ultimately providing access to high-quality science education.

300+ academic institutions (high school and higher education) in 2018-2019;

4,000+ institutions by 2019-2020.

OUTCOME 2: DELIVER LEARNING OUTCOMES

DESCRIPTION: Published research shows that Labster increases learning outcomes by **76%**. Those gains are measured via how many individual learning outcomes have been delivered (simulations played by learning outcomes).

4 million learning outcomes delivered in 2018-2019; **12 million** plus learning outcomes delivered by 2019-2020.

OUTCOME 3: EDUCATOR SATISFACTION

“Teacher NPS” increased **35%** from fall 2019 to spring 2020.

Labster is making accessibility a priority in 2020, with major accessibility upgrades planned for quarters two, three and four. Labster will be tracking the number of simulations that are WCAG 2.0 AA-compliant.

1 ENHANCING ONLINE CHEMISTRY COURSES WITH VIRTUAL LABS

Labs are a critical part of science education. This has traditionally been an obstacle for STEM educators who want to expand student access to their courses by moving fully online. For instructors like Dr. Kamesh Narasimhan, associate professor of chemistry at SUNY Corning Community College, virtual labs have opened up a new world of possibilities. Dr. Narasimhan recently adopted Labster's virtual labs after reading about Labster from the 2018 article in *Nature*, ". Professor Narasimhan integrated 10 to 15 simulations into his fully online, Introduction to Chemistry and Biochemistry course, where he used them with three goals in mind:

1. EXPANDING ACCESS

Equalizing student access to high-quality labs for science education was a huge motivation for Dr. Narasimhan. By adopting Labster, he was able to expand access to new groups of students.

"Labster provides a complete online package of labs that students can access anywhere in the world," he explained. "A good majority of my students live in rural areas, and this feature enables them to take the labs and finish the course without commuting to college. Many of our students are also nontraditional, and have full-time jobs and family to care for. So there are time constraints that will prevent them from taking a traditional class, but now with Labster they can progress and make improvements to their career by completing the course in time."

2. INCREASING STUDENT RETENTION AND ENGAGEMENT.

The gamified learning experience of Labster's simulations can also help disengaged non-majors to grasp key concepts easier than before. "This engagement helps us retain them in our classrooms with less effort than before." Dr. Narasimhan explains. "Labster offers an unparalleled gaming atmosphere that is unmatched currently for STEM-related learning experiences."

3. LOWER COST AND LOWER RISK

In his search, Dr. Narasimhan had been looking for a virtual lab provider that was affordable — without compromising on quality. Labster won out there as well. "Labster offers students a good financial package," he explained. "The overall cost is five times lower than other online lab alternatives, and it is half the cost of regular, school-related lab costs."

THE STUDENT EXPERIENCE

Since integrating Labster's virtual labs, more students are interested in the course, and Dr. Narasimhan has received positive feedback all around: "Labster appears to significantly increase the number of students who take this course and finish it on time." The students "love having the opportunity to take it home after they finish their day job. Students also like the visual look of Labster and the entertaining stories that capture and teach scientific concepts."

"The simulations are an immersive experience, eye-pleasing, and easy to use, and bring in a ton of resources and opportunities for students and myself to learn and enjoy. I feel that the simulations are a great resource for community colleges, and they have absolutely exceeded my expectations."

"The new generation of students will need a different set of motivational tools, and our teaching or content delivery will surely need newer paradigms. Both of these concerns are addressed by Labster."



POST SECONDARY

2 LABSTER AND COVID-19

How would you say that COVID-19 has impacted the ed-tech landscape?

Covid-19 has accelerated the transition to digital and online education, which has had far-reaching ramifications. This crisis has challenged the status quo and forced institutions to look for innovative teaching methods, ultimately providing an opportunity for ed-tech companies to demonstrate their value to the educational institutions — although it remains critical that they actually deliver on their promises. On the negative side, there has been some fallout from the negative impression that poorly run “Zoom classes” can have on the reputation of online learning.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

When COVID-19 shut down schools around the world, we realized we had to focus every part of our organization on onboarding educators and students onto our platform as quickly and openly as possible. In the first six weeks we set up more than 20,000 teachers and 1 million students with free or heavily discounted access to our virtual science labs, offering over \$5 million worth of relief access to our online learning tools at www.labster.com. Labster has since been featured in publications, like Forbes and Newsweek, for our access-first response to the COVID-19 crisis.

Beyond access, we invested nearly all of our internal product-team resources in making improvements to the customer experience and to the simulations themselves. We created new, faster product onboarding processes and access methods, and reimagined support by expanding our customer success team around the world and adding a chat feature on the website. We also made major upgrades to more than 70 simulations, improving the simulation content, rolling out support for lower-end hardware, and implementing a host of other fixes and optimizations.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Many science teachers had to fundamentally rethink their teaching approach as a result of the pandemic, and the demand for online laboratory learning solutions rose to unprecedented levels as a result. Schools’ and instructors’ needs have been much more focused on providing fast, simple, and widespread access to virtual labs for their students and courses. This includes everything from improved onboarding to a greater emphasis on accessibility. The need for instructor training has also dramatically increased due to the influx of first-time users, as has the need for rapid and robust customer support. Finally, although it remains true that educators will use Labster simulations in a variety of different ways, more of them are now looking for a holistic solution that replaces their physical lab — not simply supplementing it.

Could you provide a couple of examples of the early impact that you’re seeing as a result of your COVID-19 efforts?

The impact and market response has been swift and overwhelming. Beyond the pages and pages of thank-yous and positive comments from happy educators, Labster has seen our educator satisfaction rating (‘Teacher NPS’) increase significantly. Our efforts with product improvements have caused a rapid increase in our “simulation user rating” as well. We have also seen a massive influx of queries from university, school, and college system administrators asking about large-scale access to Labster simulations. These conversations have led to deals like the one we signed with the California Community College System, which provided Labster access to nearly 2 million students at 113 colleges.





CEO	John Katzman
FOUNDED	2016
NOTABLE INVESTORS	Osage, Swan, ValueAct, Lumina, New Ventures
WEBSITE	www.noodlepartners.com
HEADQUARTERS	New York, New York
FOCUS	Education

COMPANY

Noodle Partners is a modern, online-program manager that now helps more than 20 of the best public and private universities in the country to bring high-quality academic programs to life in the virtual world.

BUSINESS MODEL

Noodle Partners collects flat, monthly management fees, plus a small fee per credit-hour learned. The model provides a more financially sound and university-driven alternative to the conventional OPM revenue share which locks in universities to forfeiting 60% or more of tuition for at least a decade. This model costs schools \$15,000, to \$30,000 less per student.

CUSTOMER TESTIMONIAL

“The School of Business is committed to continuing our legacy of providing superior business education to minority students and diversifying the global workforce,” said Barron H. Harvey, dean of the Howard University, School of Business. “We chose to work with Noodle Partners because of their innovative approach, commitment to efficiency, and transparent practices. With their help, we have broadened our capacity to meet students wherever they are in their careers — and in the world — and we could not be more excited.”



JOHN KATZMAN

Founder and CEO

John Katzman is the founder and CEO of Noodle Partners, which has created a network of leading universities, including the University Michigan, University of Virginia, Harvard University and Howard University, helping them build excellent online and agile programs with flexibility, transparency and efficiency.

Prior to Noodle Partners, Katzman founded and ran both 2U and the Princeton Review. He has served on several, nonprofit and for-profit boards of directors, including those of Renaissance Learning, Carnegie Learning, the Woodrow Wilson Foundation, the National Alliance for Public Charter Schools and the National Association of Independent Schools. He has authored many articles, and five books.

“We can actually lower the cost of higher education by 25% without impairing the student-to-faculty engagement that makes it all work.”

- John Katzman, Founder and CEO

PAIN

There are a million different ways to build and configure an online-learning environment. Finding the right combination of tools and providers to bring into the university ecosystem can be challenging.

SOLUTION

Noodle Partners presents to each university a curated network of third-party providers in every facet of online-program management, from digital-marketing agencies to social-learning tools. Together, they determine the right complement of internal university resources and external providers.

PRIMARY PRODUCT STAKEHOLDERS

Higher-education institutions, staff, faculty and their students.

RECOMMENDED PRODUCT USAGE

Students receive their degrees by taking their program online.



NOODLE PARTNERS BY THE NUMBERS

USAGE

3

Average sessions per student each week

7.5

Average of online class preparation per student each week

REACH

5.5k+

Students

200

Educators

19

Public and private universities

27

Schools

45

Programs

17

Countries

ACCESS

50%

Students of color

36%

Black

7%

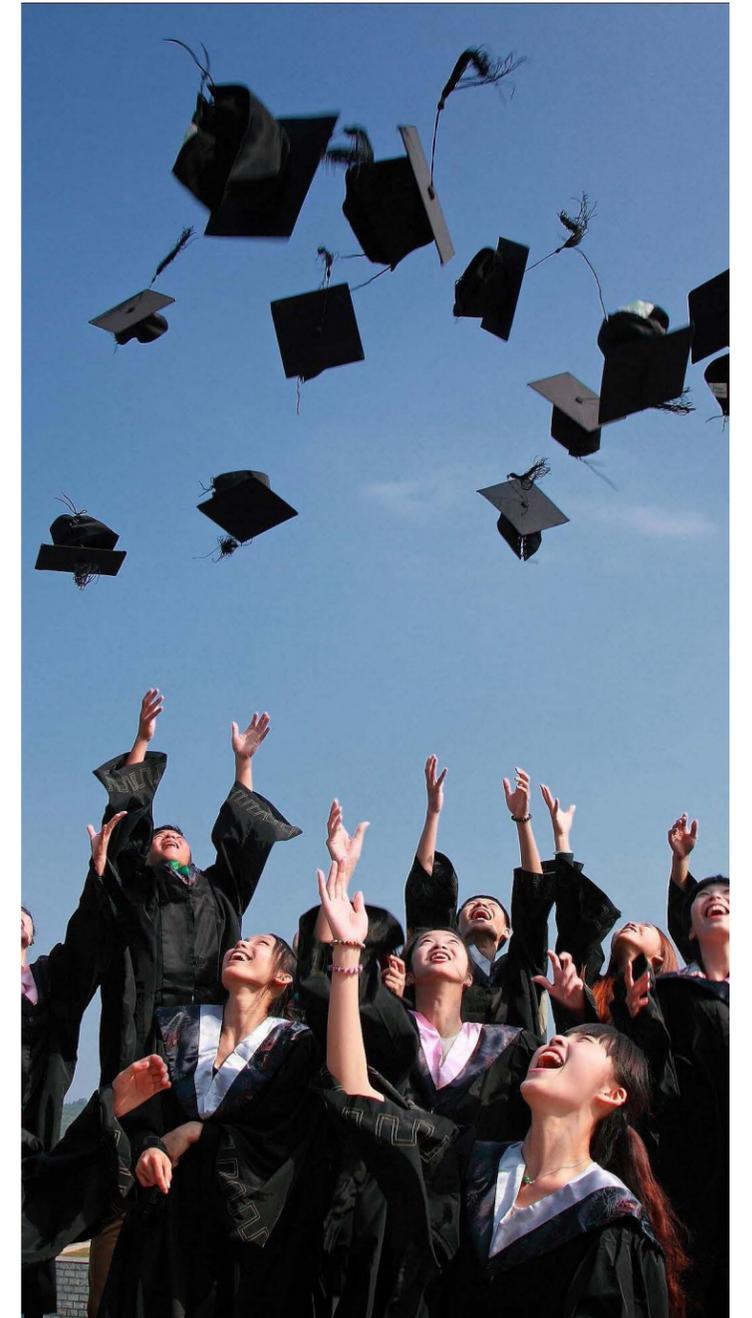
Latinx

5%

Asian

46%

White



PRODUCT OUTCOMES

OUTCOME 1: MARKETING

Cost of acquisition: the variable, marketing and recruiting costs as a percentage of the lifetime value of the total student revenue or tuition generated.

Goal: **24%** for programs over two years old

Actual: **21%** for programs over two years old

OUTCOME 2: ENROLLMENT

Percent to goal: number of enrolled students as a percentage of goal.

Goal: Always **100%**

Actual: Overall, **85%**

OUTCOME 3: RETENTION

Program Retention: Number of students remaining in program after each cohort as a percentage of the initial number enrolled.

Goal: **85%**

Actual: **87%**



1 UNIVERSITY PARTNERSHIPS

Noodle Partners' earliest partner, American University, signed with it in 2016 to take two education programs online: Master of Arts in Teaching, and M.Ed. in Education Policy and Leadership. At the time, graduate-education programs at American University were managed in the School of Arts and Sciences. The online programs effectively doubled enrollment in this department, which propelled the creation of the School of Education as an independent college at American University. At that point its partners at American University asked to launch an online Ed.D. program with Noodle Partners, which is now live.

Its partnership with Tulane University began with an online Master of Social Work program. It now works with three different schools at Tulane University: the School of Social Work, the School of Professional Advancement, and the School of Public Health and Tropical Medicine. All programs opt to receive a full suite of services. Its strategy is to expand online programs to cover as many disciplines as possible.

Since its inception, Noodle Partners has doubled enrollments in Tulane University's School of Social Work through successful recruitment campaigns for the online Master of Social Work program, and has expanded to offer a successful, online Doctor of Social Work program.

University of Tennessee-Knoxville Haslam's M.S. in Supply Chain Management overshot enrollment goals for the inaugural cohort; the school is now partnering with Noodle Partners on the Executive MBA program, as well. Based in part on this success, UTK's provost and other senior leaders selected Noodle Partners as the provider of choice for the entire campus, and announced in 2019, a plan to launch up to 10 online programs with Noodle Partners.

University of Michigan-Ann Arbor's Ross School of Business, the No. 10-ranked business school, has committed considerable resources to build state-of-the-art online courses that redefine quality. It has met enrollment projections since the program launched (without cannibalizing ground enrollments). Due to the success of the online part-time MBA, Ross has eliminated the long-standing part-time evening MBA, which required face-to-face attendance.

2 NOODLE PARTNERS AND STEVENS INSTITUTE OF TECHNOLOGY ADDRESS SHIFTING DEMAND WITH ONLINE PROGRAMS

Universities have had to quickly pivot their campus-based programs online, raising awareness and usage of ed-tech. They have realized that they need greater agility between their campus-based and online programs (i.e., students can move back and forth between modalities). Noodle Partners has actively helped universities move their campus-based programs online, and has trained faculty on how to manage an engaging synchronous session.

Noodle Partners and Stevens Institute of Technology address shifting demand with online programs
Stevens grows online offerings with new M.S. in data science and an enhanced M.S. in computer science.

Responding quickly to adult learners' needs amid the COVID-19 pandemic, Stevens Institute of Technology announced a new emphasis on high-demand, online graduate programs, by partnering with Noodle Partners, the fastest-growing online program manager. The first phase of the partnership includes revising and growing Stevens' existing, online Master of Science in computer science program, and launching a new, online Master of Science in Data Science. Marketing of the programs commences in August, 2020, with students beginning study in January, 2021.

Long an innovation leader — Stevens was the first university to require students to have a computer and it developed one of the nation's first intranets — Stevens launched StevensOnline to coalesce a growing body of online, graduate programs in business, computer science, engineering, and systems engineering. Data science, a foundational pillar for Stevens, is routinely ranked as a thriving field in America. Offering the master's degree in data science online will help meet growing demand for data scientists across the labor market. The existing, online Master of Science in Computer Science program, already a strong performer, will be enhanced and remarketed to a wider audience of adult learners seeking the same high-quality Stevens' degree without having to be on campus.

"Stevens is dedicated to providing students with the best-possible educational experience, and our collaboration with Noodle Partners is part of this ongoing mission," said Christophe Pierre, Stevens' provost and chief academic officer. "We know that an increasing number of students are looking for options beyond traditional classroom learning. By partnering with Noodle, we are building on our many years of leadership in online education to deliver our highly ranked graduate programs to students across the United States and around the world."

"Stevens Institute of Technology is a vital new member of the Noodle Partners network, offering compelling STEM programs to a market hungry for computer and data-science master's degrees," noted Noodle Partners CEO John Katzman. "COVID-19 is accelerating the preference for, and proliferation of high-quality, online degrees, and Stevens Institute of Technology will find a ready audience of students. We look forward to launching additional programs with Stevens in the future."



CEO	Susan Decker
FOUNDED	2018
NOTABLE CO-INVESTORS	Javelin Venture Partners, and numerous private investors or family funds
WEBSITE	www.pro.raftr.com/
HEADQUARTERS	San Francisco, California
FOCUS	Events and communications platform

COMPANY

Raftr is an authenticated, events and communications platform for universities that requires all users to be authenticated with their university's specific, .edu email address, creating secure, campus-specific, curated experiences. Raftr is available in three platforms: two mobile applications (iOS, and Android), and one desktop web experience. It is rich with social features, including group messaging, polls, and a full events calendar that is automatically curated from existing university sources. This offers students a familiar and comfortable way to connect with one another, while providing university administrators with a secure way to connect with students.

BUSINESS MODEL

Raftr has a B2B2C, Software as a Service business model at this time, receiving subscription revenue as a licensing fee for use of the software platform. This fee varies by how many groups a school needs, which is partly a function of its size, along with up-sells for integrations and feature packages. Once it builds a strong network of highly engaged communities, it intends to also monetize the business through advertising and transaction revenue.

CUSTOMER TESTIMONIAL

"All I can say is thank goodness for Raftr! We could not have done without it at this time. It is serving us extremely well, particularly with all the communicating we are having to do, etc. Thank you, Raftr!" Dr. Charles Tustin, Head of the College, St. Margaret's College.

POST SECONDARY



SUSAN DECKER

Founder, CEO, and President

Susan Decker is the CEO and founder of Rafr, Inc., and also serves on the boards of directors of Berkshire Hathaway, Costco Wholesale, SurveyMonkey, Vail Resorts, and Vox Media. From 2000 to 2009, Decker held various executive-management positions at Yahoo!, ending as its president. Before Yahoo!, Sue spent fourteen years (1986-2000) at Donaldson, Lufkin & Jenrette. Decker holds a B.S. from Tufts University, with a double major in computer science and economics; and an MBA from Harvard. She is a chartered financial analyst.

“I started Rafr based on a problem I saw with digital communication on university campuses. In short, it is broken. I became aware of it through the eyes of my children as they became university students. Now, in this post-COVID-19 world, the need for creating warm and inviting digital communities has become even more important for students to feel like they can find people with similar interests and feel connected to what matters to them. It is also critical for university administrations to reach students where they are.”

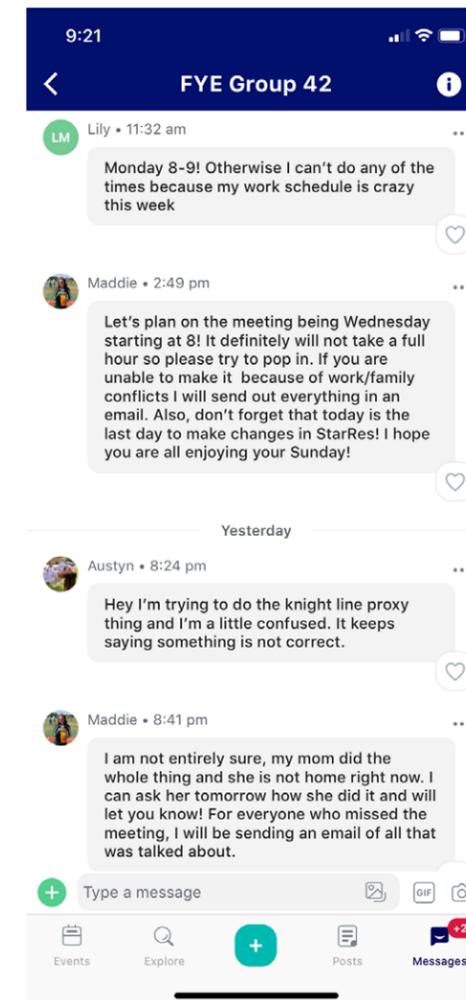
– Susan Decker, CEO

PAIN

Rafr provides administrators, faculty and student leaders the tools to manage communication with their groups and teams in a modern, comprehensive and fun way. One of the integrations Rafr offers is to include a comprehensive feed of news and events happening on campus by automatically curating it from existing sources. Rafr offers specific solutions for orientation and residence life, including customized maps, checklists, guides and messaging groups. Rafr also offers student leaders powerful tools for promoting their student groups to a wider audience of students. During this post-COVID-19 time, Rafr gives students the ability to connect with their peers even when they aren't on campus.

PRIMARY PRODUCT STAKEHOLDERS

Higher-education administrators, faculty, student leaders, and students



RECOMMENDED PRODUCT USAGE

Customers receive access to the Rafr platform. For administrators, faculty and student leaders, the most critical features are authentication of their community, power tools to manage their community, and the ability to customize and personalize the experience for their target student-user base. For students, the most critical features are posting and messaging.

When university administrators, faculty, or student leaders post information and events within the app, they are benefiting by getting that information in front of their students. They can easily send notifications and messages to communicate with those students and with each other.

Student users can see benefits just from opening the app and reviewing the information contained within the app, whether it be posts of events happening on campus, orientation guides, information posted by their dorm resident advisor, campus maps, dining-hall menus or information about groups on campus. They can also connect with fellow students or university faculty and staff by messaging within the app.

PRODUCT USAGE

Rafr has found that approximately 80% of user actions within the app have been messaging related, whether chat in public and private rafts, messaging within private message groups, direct messages between two people, and “likes” of those messages. Students have really appreciated how easy Rafr makes it to connect with people at their university, even more so in the post-COVID-19 environment.

RAFTR BY THE NUMBERS

USAGE OCT – FEB, 2020

13

Sessions per week, per user

72

Minutes per week, per active user

USAGE FEB – JUN, 2020

18

Sessions per week, per user

117

Minutes per week, per active user

REACH

7k+

Users

11

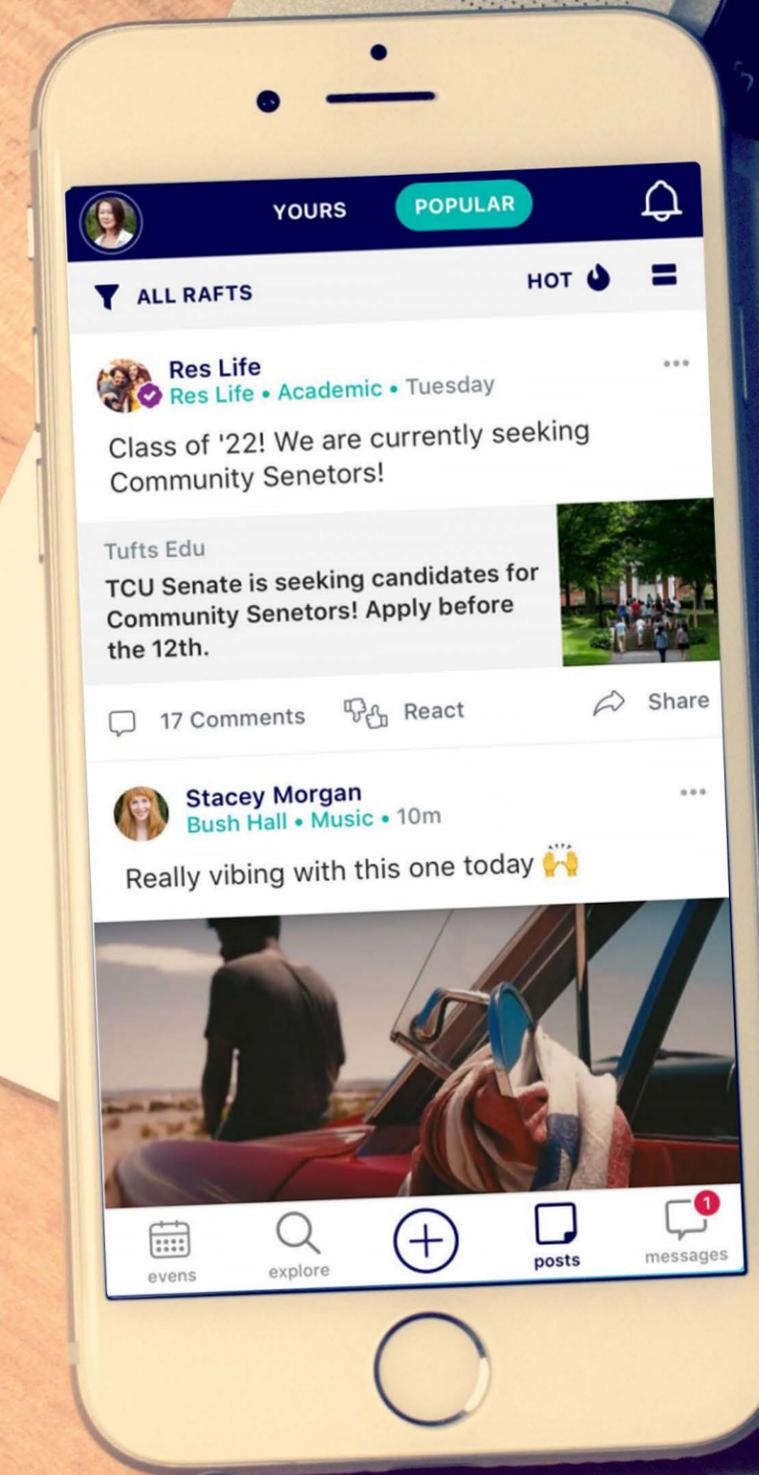
Higher-education institutions

7

States

3

Countries:
United States, New Zealand
and France



PRODUCT OUTCOMES

OUTCOME 1: BETTER COMMUNICATION BETWEEN COLLEGES AND THEIR STUDENTS

DESCRIPTION: Provide a platform for colleges to communicate with and manage their communities

REPRESENTATIVE METRICS:

Number of informational posts created: **955**

Number of Events posted: **701**

Number of List Posts created: **271**

Number of Push notifications sent: **36** were sent to **4,716** users in June.

Number of polls posted: **78**

OUTCOME 2: GREATER EFFICIENCY FOR ADMINISTRATORS, FACULTY AND STUDENT LEADERS

DESCRIPTION: Save time for administrators by automatically posting content pulled from various websites and social media so that they don't have to compile or repost it themselves.

REPRESENTATIVE METRICS:

Number of auto-generated events posted: **271,000**

Number of auto-generated news posted: **172,000**

Number of auto-generated tweets posted: **6,000**

OUTCOME 3: A MORE-ENGAGED AND CONNECTED STUDENT BODY

DESCRIPTION: Enable students to easily connect with others at their universities through chat and messaging, to find out what's going on at their campuses through event posts, and to get information related to their dorms, orientation and/or the university at large through posts and guides.

REPRESENTATIVE METRICS:

Number of chat messages: **19,453**

Number of chat likes: **16,147**

Number of DMs: **14,889**

Number of user-generated posts: **1,834**

Number of engagement with posts: **10,003**

Number of poll votes: **3,468**

Number of of rafts: **1,250**

1 HOLY NAMES UNIVERSITY USES RAFTR

Without a doubt, the impacts related to COVID-19 have sent many colleges and universities into a phase of uncertainty that is unprecedented in higher education. In May, 2020, Raftr partnered with four institutions seeking online orientation platforms that could help reconnect a class who had seen their high school graduations disrupted and faced the reality of a similar disruption to their freshman year of college.

One of those universities, Oakland-based Holy Names University, reached out to Raftr in hopes of recreating its summer pre orientation experience, called Hawk Days, in a virtual format that would be both efficient and fun for incoming first-year students. Through Raftr, new students are fostering new friendships through group chats, joining in one of five, live “Virtual Hawk Days” events throughout the summer, and exploring campus resources like virtual tours, a digital “Hawkipedia” of student services, video welcomes from first year faculty, and direct access to staff and student leaders who are providing unparalleled, direct support to the Class of 2024.



2 REFLECTING ON COVID-19'S IMPACT ON RAFTR

All of our worlds have been turned upside down by COVID-19, and many individuals and institutions are enduring serious hardships. Fortunately, Raftr is one of a small group of companies that are directly positioned to provide a critical solution in this time of need. While the Raftr communication platform always provides value to its customers in helping connect students with each other and with the administration, during this current environment, its product has become even more essential to its customers. With students no longer physically on campus (or potentially on campus in the fall under considerably different conditions, e.g., masks, social distancing, etc.), the ability to connect with one another is more important than ever.

In March, 2020, Raftr issued a press release announcing that it would be providing its services free of charge through July, 2020, to any school who would like to use its app during this time of transition for educational institutions. Raftr has been experiencing record, inbound interest since that time, and as a result, it has begun hosting weekly webinars for prospective customers to show how Raftr can be used to cultivate connections and help students, faculty, and administrators to operate better in a virtual-learning environment. We performed demos to over 100 universities through these webinars since March 24, which is more than we completed in the entire year of 2019!

They are also currently in the process of planning a Raftr Virtual Summit in fall, 2020, for higher-education administrators. With a general focus on the topic of community-building in virtual or semi-virtual settings, the Raftr Virtual Summit will provide an opportunity for student-affairs professionals (student life, FYE, residence life) to come together for a multitrack summit with other professionals. Topics will focus on navigating changes to the student experience in light of social distancing, virtual or hybrid instruction, and the challenges of maintaining safety protocols while providing students with a successful and fulfilling campus experience in fall, 2020. This will be a no-cost event for prospective and current customers.

The Raftr team is well and has operated at 100% throughout the crisis. Its distributed model has allowed it to maintain essentially normal levels of employee and operational productivity. It has been able to deliver outstanding customer service levels despite a significant increase in traffic and engagement. It has received very favorable feedback from some of its existing schools regarding Raftr’s role in supporting students and administrations during operational moves off campus. A few examples:

Underlying metrics demonstrate why customers are enthusiastic, showing very strong engagement from college students throughout the period since schools have been navigating the COVID-19 environment. Raftr’s DAU/MAU across all launched schools has steadily increased over the first half of 2020, from an average of 22% in January, 2020, to an average of 30% for June, 2020, to date. We also saw large increases in time spent in the app during the first half of 2020, with average daily time spent in the app per active user doubling from eight minutes per day in Q4 of 2019 to 16 minutes per day in Q1 of 2020 and Q2 of 2020.

CAREER MOBILITY

Degreed

Lingo Live

MasterClass

SanJieke

SV Academy





CEO	Chris McCarthy
FOUNDED	2012
NOTABLE CO-INVESTORS	Signal Peak, Jump Capital
WEBSITE	www.degreed.com
HEADQUARTERS	Pleasanton, California
FOCUS	Upskilling (training and development)

COMPANY

Degreed is the leading workforce-upskilling platform. The company integrates everything people use to learn and grow, including LMSs, courses, videos, articles, projects and peers. Degreed then leverages data science and machine learning to match everyone to development opportunities, based on their unique goals, skills and roles.

BUSINESS MODEL

Degreed is free to users; the majority of revenue is generated from enterprise sales. It monetizes at the enterprise level through SaaS license fees. If a learner leaves an enterprise customer, the learner keeps their profile. This allows Degreed to serve as a lifelong transcript of learning and skills.

CUSTOMER TESTIMONIAL

Imperial brands: “Four years ago, we were delivering 12,000 learning hours globally at a cost of about \$100 per hour,” reports L&D leader, Darren Bartlett. “Last year, we delivered over 85,000 learning hours at a cost of \$10 per hour.” That amounts to a seven-times increase in total learning, while also cutting the cost per hour by nearly 90%.

CAREER MOBILITY



DAVID BLAKE

Co-founder, Executive Chairman

David is the executive chairman of Degreed. David co-founded Degreed in 2012, and served as CEO until 2018. Prior to founding Degreed, he had worked on the founding team of Zinch, a social network that connected students to a wide range of education opportunities. Zinch was acquired by Chegg in 2011. Before transitioning to education technology, David had spent several years working as a management consultant.



ERIC SHARP

Co-founder

Eric is a co-founder of Degreed. Prior to co-founding Degreed, Eric had worked at a variety of startups. He served as the director of software development at MediConnect, and Novarad, and as a software engineer at HK Systems. Eric earned an MBA from Brigham Young University, and a bachelor's degree in computer science from the University of Utah.



CHRIS MCCARTHY

CEO

Chris is the CEO of Degreed. He held executive positions at both Zinch and Chegg before becoming COO of Degreed in 2013. Chris has extensive experience in business operations and in leading organizations. An East Coaster at heart, Chris graduated from Northeastern University in 2002 before continuing on to Harvard Business School, where he graduated in 2009. Outside of Degreed, he is passionate about Boston sports and disrupting the future of higher education.

“We’ve seen a tremendous surge in client demand for our career-mobility product. It’s more important than ever for companies to understand the skills of their workforce, enrich their upskilling programs, and enable internal mobility,” said Chris McCarthy, CEO of Degreed. “Employees don’t care about a “system of record” that they see one or two times per year. They need a simple, personalized experience that helps them build their skills and advance their careers.”

–Chris McCarthy, CEO

PAIN

Eight out of 10 CEOs say that skill shortages threaten their companies’ growth. Executives report that these gaps are stunting innovation, hurting quality, and limiting the pursuit of market opportunities. 54% of the world’s workforce will need significant “upskilling” or “reskilling” (that is, training and development) over the next five years, as digitization, automation and advances in artificial intelligence change the nature of work.

SOLUTION

Degreed is a complete, workforce-upskilling platform. It’s engineered to enable businesses and their people to continuously track and develop the skills they need for the future.

PRIMARY PRODUCT STAKEHOLDERS

Workforce leaders and employees

RECOMMENDED PRODUCT USAGE

Workforce employees use Degreed to discover learning content, build skills, and certify their expertise. Workforce leadership uses Degreed to get a holistic view of the skills present within their organizations. Workers and businesses can use that skill data to assess their current skills, identify areas of improvement, and plan for the future.

DEGREED BY THE NUMBERS

REACH

4m+

Users

260+

Employers

11

Countries including, United States, Canada, Great Britain, India, Germany, France, Australia, Brazil

ACCESS

35%

Customers come from outside North America

Degreed is proud to have as clients over one-third of the Fortune 50.

PRODUCT OUTCOMES

OUTCOME 1: MAP WORKFORCE SKILLS

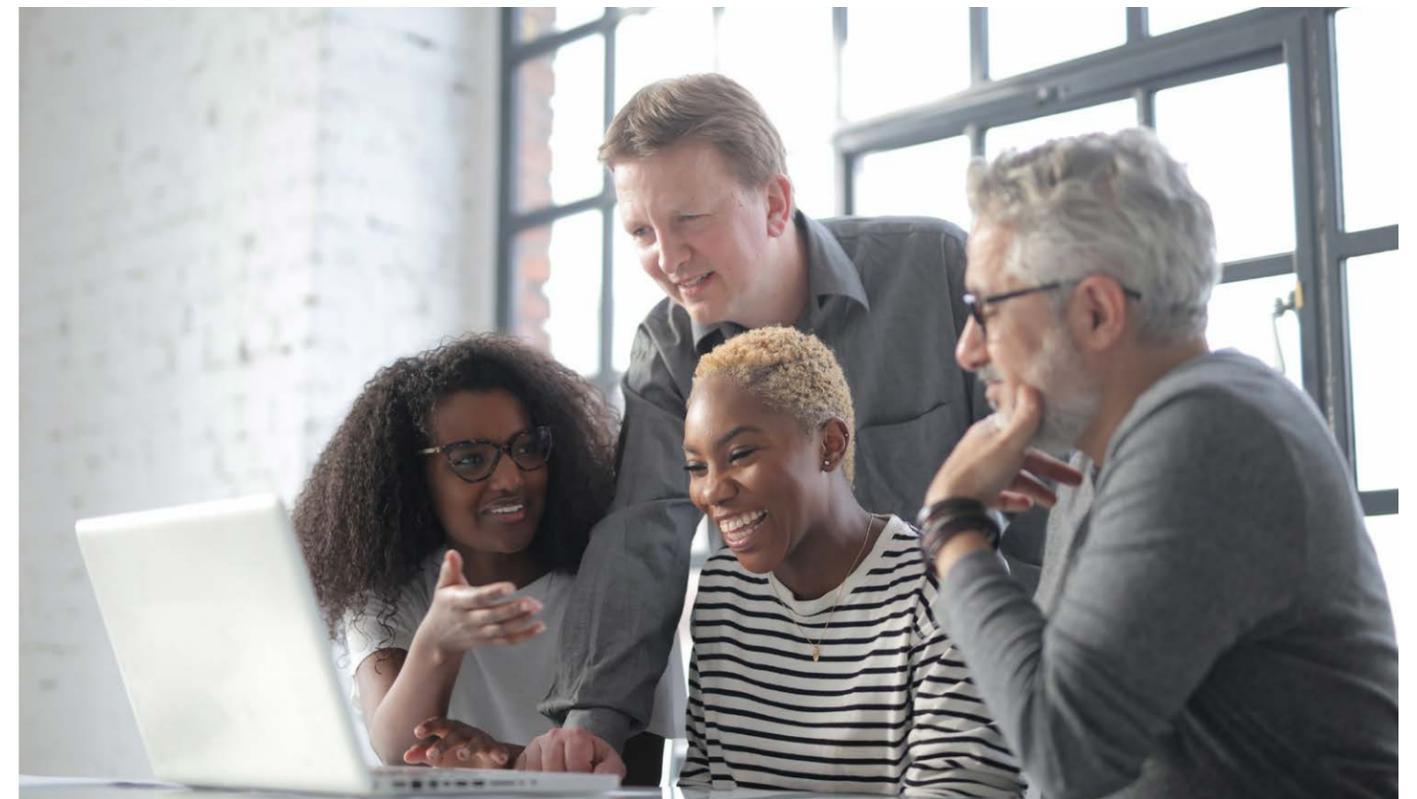
Help workers, team managers and HR leaders to benchmark and track in-demand skills, and track progress over time.

There are **5.3 million** completed skill ratings in Degreed, up from **2 million** in June, 2019.

OUTCOME 2: BUILD A POSITIVE, ORGANIZATIONAL-LEARNING CULTURE

Help organizations build a culture of self-directed learning and career development.

As of June, 2020, users have created a total of **8.9 million** skill profiles, up from **4.8 million** as of June, 2019. The percentage of users active on a monthly basis grew by **44%** in 2020.



1 HOW DEGREED HELPS FORTUNE 500 COMPANIES

INDUSTRY: BANKING AND FINANCE

Employees: 200,000 +

Use cases: Onboarding, performance management, change management; developing high performers; manager or leadership development, career mobility; reskilling specific populations; global learning initiatives; compliance, functional or product training

Features used: Pathways, plans, groups, directories, provider integrations, self-skill ratings, manager skill ratings.

Challenge: A bank wanted to support workers whose skills were becoming obsolete by helping them to develop the skills needed for the company's high-demand jobs.

Solution: A pilot program introduced a "reskilling funnel" that helped employees to explore new opportunities, take on new tasks, and develop new skills.

Results: Overall, participants showed a **20%** increase in digital knowledge and skills; plus, 12 individuals at the pilot site took on high-demand projects after excelling in the reskilling program.

Summary: How should an organization build skills that are in short supply? How can employees in a diverse workforce learn these skills in their preferred ways? And how will such persistent challenges be solved at scale?

A major U.S. bank just pioneered a novel approach to reskilling for high-demand job sectors. Through a pilot program in a mid sized U.S. city, this bank built a "reskilling funnel" for its employees onsite. The bank used three tiers, to allow some workers to explore new possibilities, to help others build foundational new skills, and to support a select few as they took on completely new projects. The results are promising on multiple levels. The bank is already planning to expand its pilot program.

MASTERCARD

Head Offices: Purchase, New York

Industry: Financial Services

Employees: 20,000

Use cases: Onboarding, performance management; compliance, functional or product training; change management, career mobility; developing high performers; manager or leadership development.

Features used: Pathways, plans and pages, groups, skill plans, provider integrations, skill ratings.

Challenge: Mastercard had to compete with startups launching new payment technologies, but many employees lacked the necessary skills, and most avoided the company's learning-management system.

Solution: The company launched Degreed for a more comprehensive and personalized learning experience, supported by a grassroots adoption campaign across the organization.

Results: **96%** of employees use the new platform, and average logins per user grew by **4.5x** times in three years. Driven by innovation, Mastercard stock more than tripled during that time.

Summary: Mastercard is renowned as a leader in payment processing. But, during the last decade, digital innovation disrupted the industry. So Mastercard resolved to greatly expand its digital offerings and to become more than just a payments processor. To make this shift to being an innovative technology company, learning was crucial. Mastercard needed the skills to compete, and Degreed helped the company to build a platform that made it happen. Existing employees developed new technology skills, and new hires learned to apply their expertise to the payment-processing industry. Now, nearly everyone at Mastercard uses Degreed, and the company is stronger than ever.



2 NAVIGATING THE NEW NORMAL: ADVICE FROM DEGREED CLIENT | UNILEVER

Degreed is interviewing clients across a wide variety of industries to hear how they're supporting their newly-remote workforces, creating virtual learning programs and maintaining productivity in uncertain times. This is definitely new territory for us all, but we hope that, by sharing best practices, insights, and real stories, we can all continue to grow, learn, and thrive — together.

Degreed recently spoke to Nicola Braden of Unilever, an international, consumer-goods company co-headquartered in London, England and in Rotterdam, the Netherlands. Unilever's products range from antibacterial soaps and beauty products, to ice cream, energy drinks and more. An estimated 2.5 billion people worldwide use its products every day.

Degreed: Could you introduce yourself?

Nicola: I'm Nicola Braden. I work at Unilever as the global learning-innovation and standards director.

Degreed: How has the COVID-19 pandemic affected Unilever's business?

Nicola: Being a global business, obviously it's had a big impact. Over two months ago now, we closed all of our offices globally and introduced social distancing in our sourcing units. So that was a big shift for some people — working from home.

Parts of our supply chain have been affected. And we've got huge demand for some of our products. In consumer goods, a lot of those products are essential for day-to-day living. We still need to wash our hair and clean our floors. But it's no different for us than for many other businesses right now — it's a challenging time for all of us.

Degreed: What does that mean specifically for the learning team? How has your work been impacted?

Nicola: One of the first impacts was a sudden, broad pull from the business. We put together some content to help people transition to working from home full time. A lot of people in offices have worked from home some of the time, but this is different. Perhaps your children are home with you, or partners and other adults are there as well.

So we addressed all the different aspects of that, like setting up an office environment that suits you for health, safety, comfort and privacy. We also addressed the emotional impact. You might be used to driving to an office environment, sitting face-to-face with colleagues, and having all the social benefits of that. Then, suddenly, you have all this fear, and are working virtually. That is a huge shift. So, we turned that content around very quickly.

Now, we're starting to understand the global impact on our business. We're identifying areas in which we need more content, either because the business needs to ramp up and prove our skills in the current environment, or because, in some cases, we're redeploying people. Some parts of the business are really busy and need more people to dive in and help. They're looking for those who have adjacent skill sets, where they may be able to virtually move over and temporarily take on a different job.

How do we do that? At the moment, we've seen the highest level of engagement with Degreed since we went live. We want to analyze how much of that is people directly going to coronavirus content, versus people looking to do more learning for whatever reason. We think it's a bit of both. It certainly does look like there's been a real interest

in learning. Perhaps some people have more time, since they're not traveling or commuting. They're developing new habits.

Degreed: In response to these new challenges, what is your learning team doing differently? Are you changing approaches?

Nicola: All of our learning team is used to working remotely some of the time. That isn't something completely new. Our team is global. So that's a big advantage. We're used to using all virtual tools to work together.

As a learning-leadership team, we are looking at our priorities to figure out what should go on hold and what new things we need to focus on now. We're working in an agile way across the learning team to get the right resources around urgent priorities. For example, we're using a calendar-planner tool to outline all the activities that are the result of the COVID-19 pandemic.

Some of the functional learning teams are taking programs they had intended to run at least partially face-to-face and turning them into entirely virtual programs. People still need development. We just need to make sure it's in the right format so that development can continue even in this situation.

Degreed: What is the role of technology at Unilever? Are there specific tools or technologies that your team is suddenly finding more useful than expected?

Nicola: One thing that's been hugely useful is getting more technology to our factory teams. Most are not on Degreed yet, because of issues that you find in factories — not having access to unique devices, always needing identities, emails; all those other things. So, we were already in the process of rolling out Degreed in those factory environments. But with the content we've created for the coronavirus, we needed to get that out to people immediately. Degreed gave us the ability to put that content onto consumer platforms, which was brilliant. That's been really, really welcomed by the business.

In terms of other tools, we're using Microsoft Teams to deliver programs and courses that would have been face-to-face. In our programs, there would be parts of the program done virtually anyway, but usually not much. When you're transitioning a three-day, face-to-face session into a virtual format, you need to have lots of interactivity. So we're using pre-existing tools, virtual programs, like WebEx, because of the great functionality to develop people through those. We're using interactivity tools, whiteboards and polls. We began to split people into subgroups; that kind of thing.

Degreed: You mentioned Pathways that Degreed rolled out on the consumer site for factory workers. Can you talk about that initiative?

Nicola: From our side, we started developing Pathways for the office staff. We made two — one, about well-being in this new environment, and one, specifically about working from home. For the factory guys, working from home isn't relevant. A vast majority of them are still in the factory. So we took the well-being Pathway and made it more relevant for people in those sourcing units. We made sure the content would be universally accessible, that it didn't require a license and it wasn't stuck behind our firewalls.

As soon as those were ready, we got it over to Degreed and got the links introduced. And those have been communicated out to the factories. Then they can just use their own devices, like their phones. Some of the factories have devices for people to learn on, such as iPads, and some of them have kiosks. They're all in different countries and different stages of development.

I think we've got a total of eight languages now. That means everyone in the factories who speaks one of those languages can actually use it. That makes a difference. We've started to use more languages in lessons now. We'll work with the factory's HR people. We help them create a version of that lesson in a local language, then they can get it out there.

Degreed: Have you found any big surprises in changing the way that your team is operating? Anything that you wish you had been better prepared for? Or anything useful to share with peers?

Nicola: One of the challenges was getting stuff in multiple languages really quickly. We've always done that, but it might take another month after a piece of content has been produced to get a version of it in the other languages. Of course, we didn't want to wait that long. It had to be turned around in a few days, which is difficult. Now we're working on the best way of translating really, really quickly. We've got processes, but a lot of them are quite slow, particularly if you need to go out to external agencies to get the translations done. And sometimes, you need to find an alternative piece of content in the local language. An external agency can't necessarily do that.

The feedback from the business was really positive, saying, "You guys have turned this around in the blink of an eye. That's really amazing." That was great, but it took a huge amount of effort to do that. So we're just looking for ways to scale that step for when we need translations done really quickly.





lingo live

CEO	Tyler Muse
FOUNDED	2012
NOTABLE CO-INVESTORS	Fresco Capital
WEBSITE	www.lingolive.com
HEADQUARTERS	San Francisco, California
FOCUS	Leadership, language and communication skills

COMPANY

With Lingo Live, emerging leaders learn how to contribute their unique potential with skills-based coaching to gain the leadership, communication, interpersonal and self-awareness skills needed to drive team and company performance. Lingo Live helps individuals make truly impactful contributions by gaining the skills and structure to make those contributions with clarity, authenticity and confidence.

BUSINESS MODEL

Lingo Live works with learning and development leaders at some of the most innovative companies in the world to deploy leadership and communication coaching across global offices through an easy-to-use, virtual platform.

CUSTOMER TESTIMONIALS

“Lingo Live has been the primary driver for people to gain confidence and advocate for their ideas. It has been crucial to our goal of attracting and retaining the best talent, allowing us to continue to expand across borders.”

— Juan Pable Cerva Fris, HR Manager, Eventbrite

CAREER MOBILITY



TYLER MUSE

Co-founder and CEO

Tyler is passionate about bringing the world closer together through meaningful human connections. Prior to starting Lingo Live, he co-founded a mentorship program for multilingual youth in New York City, and worked as an analyst for GE Energy Financial Services. His team underwrote power-project finance opportunities in emerging markets.



MIKE GIORDANI

Co-founder and Chief of Staff

Mike is inspired by Lingo Live’s vision to create a world where everyone can contribute and succeed, regardless of their linguistic or cultural background. Previously, Mike launched several projects, including Eludico, which turns the news into language lessons; Inkin, which connects writers and publishers; and Informativo 2000, a local newspaper.

PAIN

Hyper-growth organizations grow from hundreds of employees, to thousands in just a few years and, as a result, may face three growing pains: They have to promote individual contributors into manager roles quickly; their team becomes geographically distributed rapidly, which can lead to miscommunication and misalignment; and all this change can lead to a great deal of turnover, which creates a need for new strategies to retain and develop talent.

SOLUTION

Lingo Live addresses these challenges with skills-based leadership and communication coaching. Their coaching upskills emerging leaders to succeed in new management roles, helps team members collaborate effectively across geographies, and supports team members’ career growth and sense of belonging at their companies.

PRIMARY PRODUCT STAKEHOLDERS

Learners: Workforce employees at hyper-growth companies

Customers: People leaders and Learning and Development Leaders

RECOMMENDED PRODUCT USAGE

On Lingo Live, learners attend sessions with their coach one to three times a week and practice their skills on the job as directed by their coach.

Customers need to make sure they are supporting their learners’ growth by encouraging learners’ managers to check in with them and take note of their progress.

The recommendation is that learners take three sessions per week for Lingo Live’s language program, and one session per week for its leadership program.

“While working on a deal in Mexico as an analyst at GE, I realized my high school Spanish wasn’t going to cut it. I responded to a Craigslist ad posted by Kathe Solares, a Spanish teacher in Guatemala. As my friendship with Kathe grew, I became fluent in Spanish and found I could confidently express myself among groups of native speakers. I wondered why there wasn’t already a language-and-communication program based on one-on-one relationships. In 2012, I created Lingo Live. We now offer skills-based coaching, which not only improves learners’ language proficiency but also, their workplace, leadership and communication skills, which allow them to grow as collaborators and managers.”

–Tyler Muse, CEO



LINGO LIVE BY THE NUMBERS

REACH

8.2k+

Users

65

Employers

17

States

35

Countries, including the United States, Argentina, Japan, Brazil, the United Kingdom, Ireland, Mexico, Singapore, France, Mauritania

ACCESS

90.2%

English Language Learners

PRODUCT OUTCOMES

OUTCOME 1: GROW EMERGING LEADERS

Help new managers and high-performing individual contributors gain the communication, interpersonal and self-awareness skills needed to drive personal, team and company performance.

93% of Lingo Live's learners' managers have noticed improvement due to the program.

80% of learners say Lingo Live is a "must-have" for their career growth.

89% say Lingo Live lessons were crucial to achieving milestones at work.

OUTCOME 2: PROMOTE AUTHENTIC VOICE

Help workforce employees contribute their unique potential in the workplace.

Learners report that they are **22%** more confident in their workplace communication after 35 lessons.

OUTCOME 3: FOSTER INCLUSION AND BELONGING

Help workforce employees feel they are valued and welcome in the workplace because of their unique backgrounds and qualities, not in spite of them.

83% of learners say they are more likely to stay at their current employer because Lingo Live is offered.

1 HOW FICTIV IS GROWING ITS LEADERS OF TOMORROW WITH LINGO LIVE

THE COMPANY

Fictiv is a revolutionary, on-demand parts manufacturer based in San Francisco that specializes in 3D printing, CNC, injection molding, and more. Fictiv is democratizing access to manufacturing, transforming how hardware teams design, develop and deliver physical products. Its virtual-manufacturing platform pairs intelligent workflow and collaboration software with Fictiv's global network of highly vetted manufacturers. From prototype to production, they help hardware teams work efficiently and bring products to market faster.

THE CHALLENGE

It's been a great couple years for Fictiv. It has been adding clients at breakneck pace and hiring staff to keep up in its hyper-growth phase. Now, if you ask any founder if that's a problem they'd like to have and chances are they'd say yes. But it really can be a challenge. When a team doubles or triples in size, it can be hard to maintain the culture that made that team so successful in the first place. Internal development can fall by the wayside when you're trying to meet demand and to continue growing quickly and efficiently.

Fictiv understood this challenge early. It wanted to invest in professional development and its highest performers. It wanted to grow the company while maintaining the integrity of its mission and its values. And it needed to do this while juggling the unique dynamics of a scaling startup. That meant tapping the emerging leaders from its team, giving them the mentorship and coaching they needed to succeed, and keeping its culture top notch. Fictiv turned to Lingo Live to make it happen.

THE SOLUTION

Lingo Live believes deeply in the value of communication. The Lingo Leaders solution, specifically, is all about giving new managers and emerging leaders the tools they need to lead with clarity and authenticity. It's about skills-based coaching that really resonates in leaders' day-to-day work.

It was a perfect match for Fictiv's needs: Developing its next generation of leaders while continuing to grow and flourish in a competitive manufacturing ecosystem.

By and large, Fictiv's learners were great individual contributors who helped build Fictiv's culture and success, but without copious management experience. They needed a little help with some of the discrete skills necessary to lead their teams, and Lingo Leaders was a perfect fit. It works like this: Each learner meets with their personal coach, decides which area they'd like to focus on, and then gets to work. Fictiv's new leaders wanted to get better at things like advocating for themselves and their teams, developing the ability to have difficult conversations at work, and balancing their time between being a maker and a manager. After meeting with their coaches for 45 minutes, once or twice a week, literally every Fictiv worker (100%) found they were learning things that directly helped them in their day-to-day jobs.

"The Lingo Live sessions have truly been transformative," said Adeeti Katti, a Lingo Leader learner at Fictiv. "Prior to working with my coach, I saw my work as precise deliverables (with a little bit of human nuance!) that mapped up to strategy. Now I see how complicated a lot of these things are, and that the human part (emotions, self improvement, self-love, etc.) are a huge part of professional success. I've got this amazing space to work on myself, specifically when it relates to work which not only makes me a better human but a better teammate and leader. I can't tell you how grateful I am for this program."

BY THE NUMBERS

COACH SATISFACTION: **4.86** OUT OF 5

LESSON SATISFACTION: **4.5** OUT OF 5.

100% OF RESPONDENTS APPLY WHAT THEY'VE LEARNED TO THEIR JOBS.



2 IN CONVERSATION WITH LINGO LIVE'S TYLER MUSE

How would you say that COVID-19 has impacted the ed-tech landscape?

A lot of learning-and-development budgets have been frozen; many people leaders don't have the mental capacity to consider new vendors as they struggle to support their teams during this trying time. On the other hand, the need to upskill new managers is as strong as ever, so we have continued to see interest from companies with enough budget available to purchase our product.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

We've launched two, major initiatives in response to COVID-19. One is a new, six-session mini-program, called, Leading Through Change, to help managers step up for their teams during this moment of crisis. All profits benefit the CDC Combat Coronavirus Fundraiser. The other is a biweekly Zoom roundtable where HR leaders can discuss everything, from diversity and inclusion, to their most successful solutions for adapting to remote work and promoting resilience on their teams.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Our users have a greater need for the communication skills necessary for the remote workplace. They also have a greater need for the support and guidance of their coaches to keep them motivated and inspired. We are seeing more engagement from our users than ever before.





CEO

David Rogier

FOUNDED

2015

NOTABLE CO-INVESTORS

Javelin Venture Partners, NEA, IVP, Fidelity Management and Research Company, 01 Advisors, Atomico, NextEquity Partners

WEBSITE

www.masterclass.com

HEADQUARTERS

San Francisco, California

FOCUS

Ed-tech and media



COMPANY

Founded in 2015, MasterClass is the streaming platform that makes it possible for anyone to learn from the best. With MasterClass, step into Kelly Wearstler’s design studio, Ron Finley’s garden, and Neil Gaiman’s writing retreat. Improve your serve with Serena Williams, perfect your pitch with Shonda Rhimes, and leave the atmosphere with Chris Hadfield. Hundreds of video lessons from 85+ of today’s most brilliant minds are available anytime, anywhere on iOS, Android, desktop, Apple TV, Amazon Fire TV, Android TV and Roku devices with the All-Access Pass.

CUSTOMER TESTIMONIAL

Traci: “I’ve always wanted to write a book. I’m a chef, so I naturally thought that my book would be a cookbook. I started writing it, but there was something missing. I didn’t have direction, or motivation or inspiration. I put it down 15 years ago, but it’s been sitting in my mind ever since. When I started Chris Hadfield’s class, I thought, ‘Cool, I’ll learn something about space.’ What happened to me was so deeply unexpected. I stopped in the middle, and nearly broke into tears. He had me revisit every single person that has touched me throughout my life’s journey — and realized that food had a huge part in that. And suddenly, it clicked: ‘The Power of Food.’ I would write my book on the power of food. It’s now nearly finished, and in the hands of the publisher. Oh — and I’ve added a new line to my bucket list — to attend adult space camp!”

BUSINESS MODEL

MasterClass is a direct-to-consumer, subscription, streaming platform.



CAREER MOBILITY



DAVID ROGIER
CEO and Founder

David Rogier is the founder and CEO of MasterClass, where he is leading the company's reimagining of online education. Based in San Francisco, MasterClass is the platform that makes it possible for anyone to learn from the best. David grew up in Los Angeles, where he became known for two things: Entrepreneurship (he sold his first company, an internet search engine, while still in middle school), and asking too many questions in class. David attended the Stanford Graduate School of Business, where he met renowned tech investor Michael Dearing, for whom he went to work after graduation. After a year with Michael, David decided what he really wanted to do was rekindle his two favorite pastimes from his youth: Entrepreneurship and question-asking, by starting MasterClass (Michael became his first investor).

“For as long as I can remember, I’ve loved asking questions. So much that it often got me into trouble with my teachers as a kid. Funny enough, it’s that same curiosity that has been a driving force in succeeding in business and founding MasterClass. But, my real inspiration has really always been my grandmother. After escaping the Holocaust, she was denied entrance to 25 medical schools because of her gender, race and religion. This story has always stayed with me and as a result, I wanted to create a school that made it possible for anybody in the world to learn from the best minds and masters of their crafts. So really, in combining my pursuit for knowledge with a mission for accessibility, MasterClass was born.”

—David Rogier, CEO and Co-founder

PAIN

MasterClass members, regardless of their stage in life, want to better themselves and are seeking ways to do so. MasterClass is helping to solve that problem.

SOLUTION

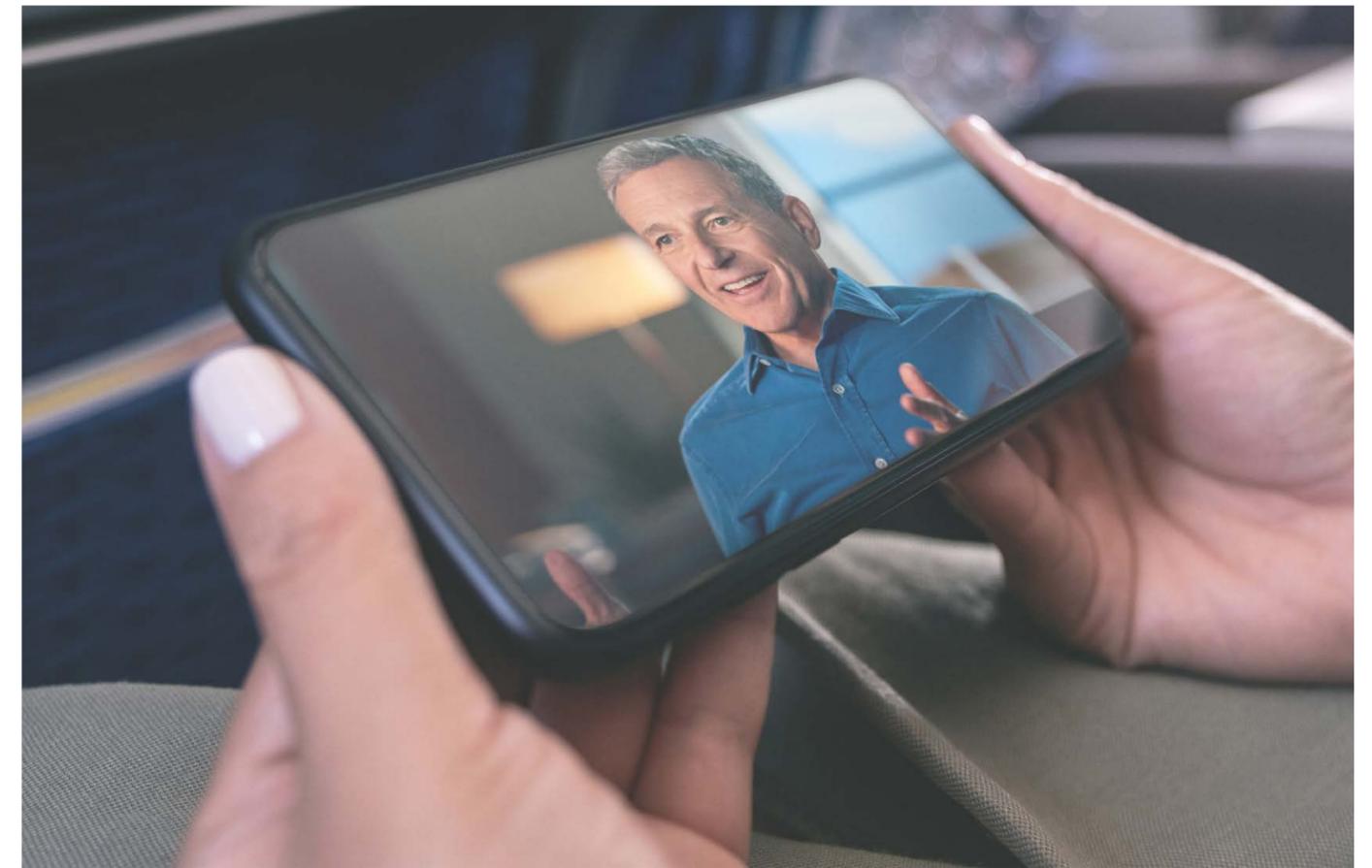
MasterClass makes it possible for anyone to watch or listen to hundreds of video lessons taught by 85+ of the world's best.

PRIMARY PRODUCT STAKEHOLDERS

The primary stakeholders are individuals, regardless of their stage and station, who are looking to develop new and existing skills.

RECOMMENDED PRODUCT USAGE

A member watches lessons from MasterClass's instructors, and utilizes the accompanying class workbooks, to learn more about the things they are passionate about.



MASTERCLASS BY THE NUMBERS

USAGE DURING PANDEMIC

2x

Users are engaging 2x times more in total minutes per month

10x

Demand has 10x over prior years

REACH

50

States

194

Countries

US, Canada, Great Britain, India, Australia, Mexico, Brazil, Germany, Italy, France

PRODUCT OUTCOMES

OUTCOME 1: CHANGE IN APPROACH TO WORK

On MasterClass, I learned something that changed my approach at work or at my hobby: **59%**.

OUTCOME 2: LEARNED SOMETHING NEW

On MasterClass, I learned something I couldn't learn anywhere else: **55%**



1 TRANSFORMING STUDENTS' LIVES

MasterClass' mission is to unlock human potential by inspiring a learning lifestyle in everyone. One of MasterClass' core, company values is to Transform Students' Lives. Regularly we are privileged to hear stories of our members' life-changing experiences that result directly from the inspiration and learning they gleaned from MasterClass. Here are just a few, recent ones to share.

LEARNER SPOTLIGHT 1: OBAJI

Obaji was forced to flee his hometown in southern Nigeria after reporting a story that exposed corruption in his local government. That's when his journey began.

He was a journalist at the time. After fleeing for safety, he began traveling incognito around Africa, taking roads less traveled to assure that he couldn't be tracked. Throughout his journey, he felt deeply inspired to tell the stories of the people and places he encountered. He wanted to tell them through film, but there was a problem: He had no resources — no money, no camera equipment, no internet — nothing. But he had an idea.

"What good is an idea if I have no resources?" Obaji thought.

He picked up gigs with Al Jazeera and the BBC as a fixer; eventually, saving up enough money to invest in his filmmaking knowledge. He bought MasterClass.

"I was immediately attracted to Ken Burns' Documentary class. I only got through a few lessons, until he said something that ignited a fire within me. You don't need resources. You need ideas."

He immediately started writing down all his ideas, and pitching them. Two weeks later, he was commissioned with two grants to make his documentaries. Obaji is now a full-time filmmaker, based in Lagos, Nigeria and makes beautiful documentaries telling the stories of Africa for Zoomin.TV.

LEARNER SPOTLIGHT 2: PARKER

Parker is an entertainer in New York City, whose mission is to champion a new form of drag into the mainstream drag spotlight: drag as an interpretive and abstract art form. His drag name, "Mr. He," is a very clever play on the word "mystery," meant to challenge how we think of gender identity.

At the start of spring, the fabulous, blue Mr. He was getting ready for her big debut at RuPaul's Dragcon, which would kick off her whole lineup of debut events for the season. This would be her moment. Her career in the spotlight was about to take off. ...

And then the pandemic hit. And everything was cancelled: Her shows, her events. Everything.

Behind the confident Mr. He, Parker felt defeated. Helpless. And most of all, hopeless.

And then something hit. Parker realized that, while it might not be Mr. He's big debut into a world of fame and glamour, the world's events were presenting a different opportunity.

"I'm going to use this time quarantined at home to better myself. This is our first obstacle as a business — and I'm not gonna let it knock us down."

Parker enrolled in MasterClass, initially drawn in by his longtime idol, RuPaul. And, next thing he knew ... Anna Wintour, Bobbi Brown, Marc Jacobs. Suddenly he had a team of masters telling him, "It's going to be OK. It's going to be more than OK. You're going to get back out there and BE 🏆 A 🏆 BOSS 🏆."

A bold, confident and reinvigorated Parker got on a plane to Los Angeles, and gave Mr. He's business plan a reboot. Soon after, Mr. He met with a producer in L.A. and signed a contract. Her first song will be going into the world this fall. And most importantly — hope was found.

"MasterClass gave me hope during it all. It gave me hope to build something to use in the future, and it gave me hope for myself."

LEARNER SPOTLIGHT 3: INGRID

Ingrid loves, and lives for cooking. Last summer, she was in an accident and suffered a concussion, two, subdural hematomas and a fractured pelvis. That night in the hospital, she realized she had absolutely no sense of smell, and very little sense of taste. When Ingrid got home, she read the doctor's write-up:

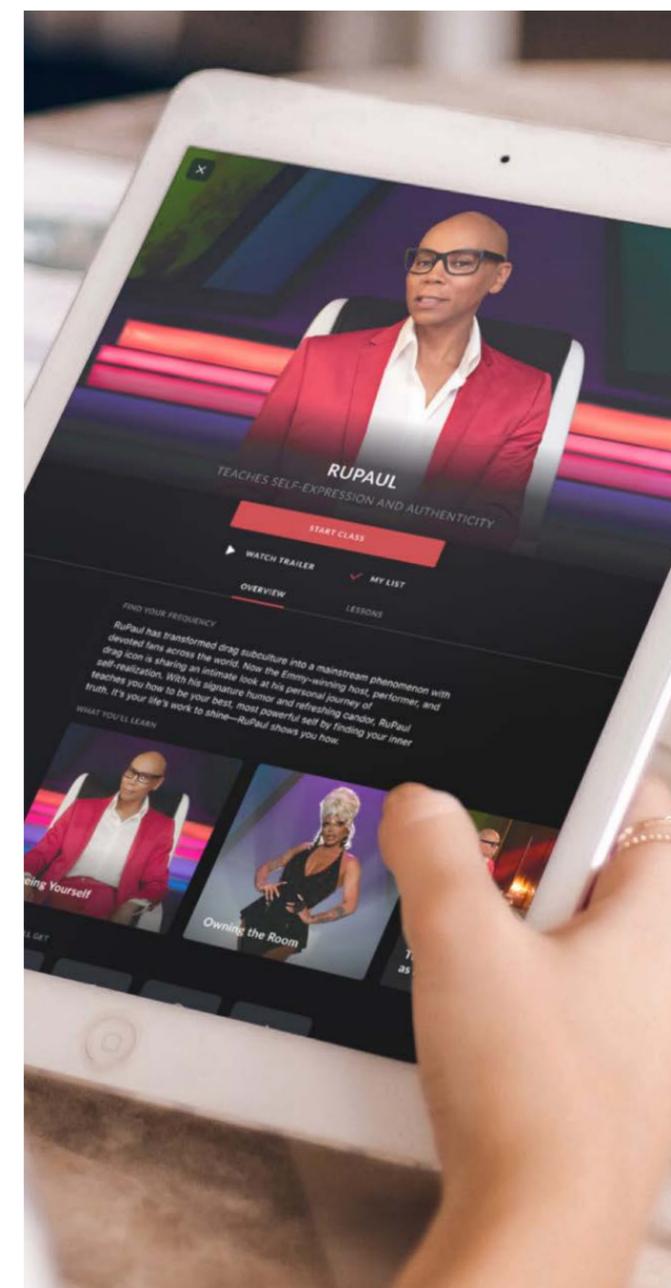
"Her loss will significantly alter her quality of life, not the least is the appreciation of the flavors of food."

Needless to say, she was crushed. She went into a deep, dark place. She feared her life would never be the same without cooking. A few weeks later, she got an email:

"I saw that Alice Water's MasterClass was available. I almost cried (and did later, as I was making dinner). I watched her first three lessons, and it all just made me want to jump and shout that cooking is so much more than tasting and smelling; it is, as she says, "meditation, love and beauty!" I immediately went to the food co-op down the street and shopped as she did. I got farrow, sage, lemon, mushrooms and thyme. I already had an acorn squash (which I roasted in cubes and set aside), and then, I cooked! I enjoyed the shopping, the chopping, the sauteing. I made a squash, mushroom and crispy sage risotto. It was life changing for me."

She threw away her cookbook, and started to enjoy again the creating and growing of food. As Ingrid puts it, "I'm not going to let a doctor steal my joie de vivre. Thank you, Alice, for helping me find it again."

Ingrid has been cooking up a storm ever since, and is slowly starting to gain back her sense of smell and taste. Now, she even has a beautiful garden where she's using fresh, home-grown ingredients to create healthy dishes!



2 INTERVIEW WITH MASTERCLASS

How would you say that COVID-19 has impacted the ed-tech landscape?

Pre-COVID-19, there was already demand for more flexible and personalized forms of life-long learning beyond higher education or advanced degrees. But, these past few months have shined a spotlight on the benefit of online education. At MasterClass, we've been fortunate to know, early on, that people could benefit from a different learning model, one that is at the intersection of engagement and education, where you can learn on your own time.

If anything, the pandemic has confirmed that on-demand learning is here to stay.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

While we filmed prior to COVID-19, we were able to release our classes at times that resonated with consumers. Our class on interior design with Kelly Wearstler, for instance, launched in March just as we were all sheltering in our homes, staring at our walls. Gardening with Ron Finley launched in April, just as people were looking to grow their own food; and Robin Roberts, who teaches us about vulnerability and empathy, spoke to so many when his class was announced in May.

We also launched three, new initiatives to help expand and reach new audiences. In April, we introduced MasterClass Live, a virtual, Q&A series where members can connect with MasterClass instructors beyond their classes via livestream. It was important for us to provide access to the world's best, to everyone who was at home, so we made this member benefit available to the public. In addition, with so many of our members at home taking classes, we wanted to give them the opportunity to share MasterClass with their friends, family and loved ones, so we came up with "+1," where every member was given an All-Access Pass to gift, at no additional charge. And starting early April, we ran a "Buy One, Share One" promotion where new members would receive an additional All-Access Pass to give to someone else.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

Before the pandemic, you set aside a time to learn, and a time to be entertained. COVID-19 has erased that line. Learning is happening throughout the day — in between meetings, kids and dishes. People are wanting to go at their own pace, press pause, jump around. It's much more blended now.

Could you provide a couple of examples of the early impact that you're seeing as a result of your COVID-19 efforts?

MasterClass more than doubled sales last year and is seeing a big surge of demand, including weeks of demand 10x over the prior year, and engagement 2x more in total minutes per month.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

How big the opportunity is! We truly believe you can learn something new every day. And with less travel, more remote socialization and greater work-from-home, we're finding our community taking advantage of our platform to stay curious, push comfort zones and dip into new life lessons.

Looking back at 2020 so far, what feels like 20/20 hindsight now?

No one could have predicted this would happen, that millions of us would be stuck indoors for months, but what we did predict was that online learning was going to have a moment. We knew five years ago that education needed a new lane. We stuck to our gut and relentlessly pushed. That lane now seems endless.





CEO	Luke Hou
FOUNDED	2015
NOTABLE CO-INVESTORS	IDG, Wu Capital
WEBSITE	www.sanjieke.cn
HEADQUARTERS	Beijing, China
FOCUS	Vocational Training

COMPANY

SanJieKe is a leading vocational-education platform in China, focused on addressing the digital-skills gap for young professionals. Founded in 2015, the company offers courses in product management, product marketing, operations, digital media, and other skills critical for roles within the new digital economy. SanJieKe's vision is to fill the gap between social and economic needs, and the education system.

BUSINESS MODEL

SanJieKe has two primary lines of business: direct-to-consumer, online courses, and enterprise training.

CUSTOMER TESTIMONIALS

"Because of this course, I got a ByteDance offer. During the interview, I used the analysis model and project I had learned at SanJieKe. The interviewer was particularly interested in me, and asked me many questions."

CAREER MOBILITY



YOUCAN HUANG
Co-founder

Youcan has worked in internet operations for nearly 10 years across companies like About.com, Sina, and Zhou Botong. He has successively served as operations manager, COO, and as an entrepreneurship tutor in the small-dining-table entrepreneurship class.



CAIXIN XU
Co-founder

Xu served as product director at Ganji.com, and at K-12 education giant, XueErsi.



LUKE HOU
Founder and CEO

Luke has been engaged in Internet product design, product architecture, and product team management for more than 10 years. He has successively served as a product manager for Zhilian recruitment, a senior product manager for Alibaba, a product director for Century Jiayuan, and a product architect for Baidu. Luke is also a Gold lecturer at Baidu Institute of Technology, and Baidu Institute.

“The most exciting thing is to train the talent that the university does not cultivate, but that industry is in great need of. By meeting the two-way needs, of users and employers, we have achieved the business logic of a three-way, win-win-win situation.”
—Luke Hou, Co-founder and CEO

PAIN

The Chinese economy is expected to add over 100 million services roles in the next six years, accounting for approximately 450 million jobs by 2025. Internet- and technology-related positions are among the most-in-demand of these newly created jobs, offering the second-highest, average salary across industries; second only to finance. Yet, despite the high pay and prestige of these roles, companies are struggling to recruit the right talent, creating a 20% to 30% shortage of trained applicants for digital-economy positions. The shortage is likely to worsen in the short term, with new job postings having grown 30% over the last 12 months, leading to an estimated 9.5-million-person talent gap by 2025.

SOLUTION

SanJieKe addresses the lack of trained digital talent through its asynchronous, project-based courses. Focused on real-life tools and problems, SanJieKe’s courses are all localized to the Chinese internet ecosystem and follow five main course tracks: product, operations, marketing, new media, and data. The courses, which revolve around regularly updated cases, provide learners with hands-on experience, using the tools, data and concepts that are valuable in industry but not taught at traditional universities.

PRIMARY PRODUCT STAKEHOLDERS

Students and employers

RECOMMENDED PRODUCT USAGE

Students spend 6 to 10 hours per week studying, of which three to four hours are spent listening to the classes to understand the core concepts and core methodology in the course. The remaining six hours are used for practice, doing the homework and internalizing what they learn.

The core values delivered to students include:

1. Employment opportunities
2. A practical set of homework problems focused on real-world challenges, to increase the probability of success for students during an interview.

SANJIEKE BY THE NUMBERS

USAGE

8

Hours per student per week

REACH

2m+

Users

100k+

Students

345+

Employers

CASE STUDY

1 SHEN'S JOURNEY WITH SANJIEKE

Shen (one of SanJieKe's students) has worked as an oil-field handyman, a nail-shop owner, a restaurant waiter, a bartender, a local salesman, an interior designer, and even wanted to rely on a fake resume to add an internet company to the mix. When he came to SanJieKe, he said that his biggest wish was not to "deceive" a job through a "fake resume," but, really, to get a reliable job with his true strength.

However, while participating in the course, he unfortunately found himself amid a series of changes, including being excluded from the company; sudden serious illnesses, where he was sent to an ICU; and his wife divorced him because of lack of money. He also suffered from mild depression.

In the face of such changes, he somehow persevered; he said to himself that he must get the "excellent student" grade on the course he was doing. Finally Shen succeeded in obtaining the coveted title, "Excellent Student," by virtue of an excellent product design he completed. While a small win for most, SanJieKe gave him solace and confidence during an otherwise trying time.





SV Academy

CEO	Rahim Fazal
FOUNDED	2017
NOTABLE CO-INVESTORS	Sound Ventures, Bloomberg BETA, Kapor Capital, Strada Education, ReThink Education
WEBSITE	http://sv.academy
HEADQUARTERS	San Francisco, California
FOCUS	The future of work

COMPANY

Founded in 2017, SV Academy is the noncoding way to make it in America. Through an online-skill-building and employer-matching platform, SV Academy offers under-resourced, underrepresented communities access to sales careers in the tech industry. The company provides mentorship, job-placement assistance, and post-hire support, such as alumni-networking events and coaching, with 60% of its graduates promoted in the first year.

BUSINESS MODEL

Employers, job seekers. Deferred tuition model.

CUSTOMER TESTIMONIAL

Pete Prowitt, Head of Sales, Loom

“I think SV Academy brings forth candidates who are really ready to adapt to change, stay resilient, and stay positive.”

CAREER MOBILITY



RAHIM FAZAL

Co-founder and CEO

Rahim is a serial entrepreneur with an unconventional background. He grew up in government housing; was fired from McDonald’s; and skipped college altogether. Prior to starting SV Academy, Rahim was the CEO of Involver, an enterprise, social-media platform, which was acquired by Oracle. After the sale, Rahim spent nearly three years embedded in global, inside-sales and product-development organizations. Rahim was named in “Top 40 Under 40” by the San Francisco Business Times.



JOEL SCOTT

Co-founder and COO

Joel is a seasoned tech executive with 20-plus years of experience in scaling software-as-a-service platforms. Prior to starting SV Academy, Joel was VP of Operations at Hewlett Packard Enterprise, and COO, Americas for Autonomy (acquired by Hewlett Packard). Joel is a graduate of Stanford Law School.

PAIN

There are 14 million retail sales-and-service roles impacted by COVID-19 in the United States. Many of these jobs have disappeared forever. With increased automation in the workforce, employer demand for tech-sales skills is far outpacing supply.

SOLUTION

SV Academy is a risk-free, hands-on, online training program that transitions job-seekers into full-time tech-sales roles with an average starting full-time offer of \$79,000.

PRIMARY PRODUCT STAKEHOLDERS

Students, employers and universities

RECOMMENDED PRODUCT USAGE

Students graduating from the program, universities referring candidates or applicants to the program, and employers hiring our graduates.

“Joel and I are trying to leverage the resources and the connections we’ve built to shed a light on these amazing students, to make it impossible for tech companies to ignore them simply because of their names or how they look. To give these students a way to achieve a stellar education regardless of their backgrounds or financial situations, and to help them find ways to really play to their strengths and show the world just what they can do. Everybody, regardless of nationality or background, deserves a fair shot at the American dream, and where they come from shouldn’t revoke their rights to that opportunity. I think that’s something that’s always worth fighting for.”

–Rahim Fazal, Co-founder and CEO



SV ACADEMY BY THE NUMBERS

USAGE

40

Hours of activities a week;
full time

20

Hours of activities a week;
part time

REACH

500+

Graduates

2

Higher-education institutions

250+

Employers

ACCESS

42%

Students of color

60%

Women

25%

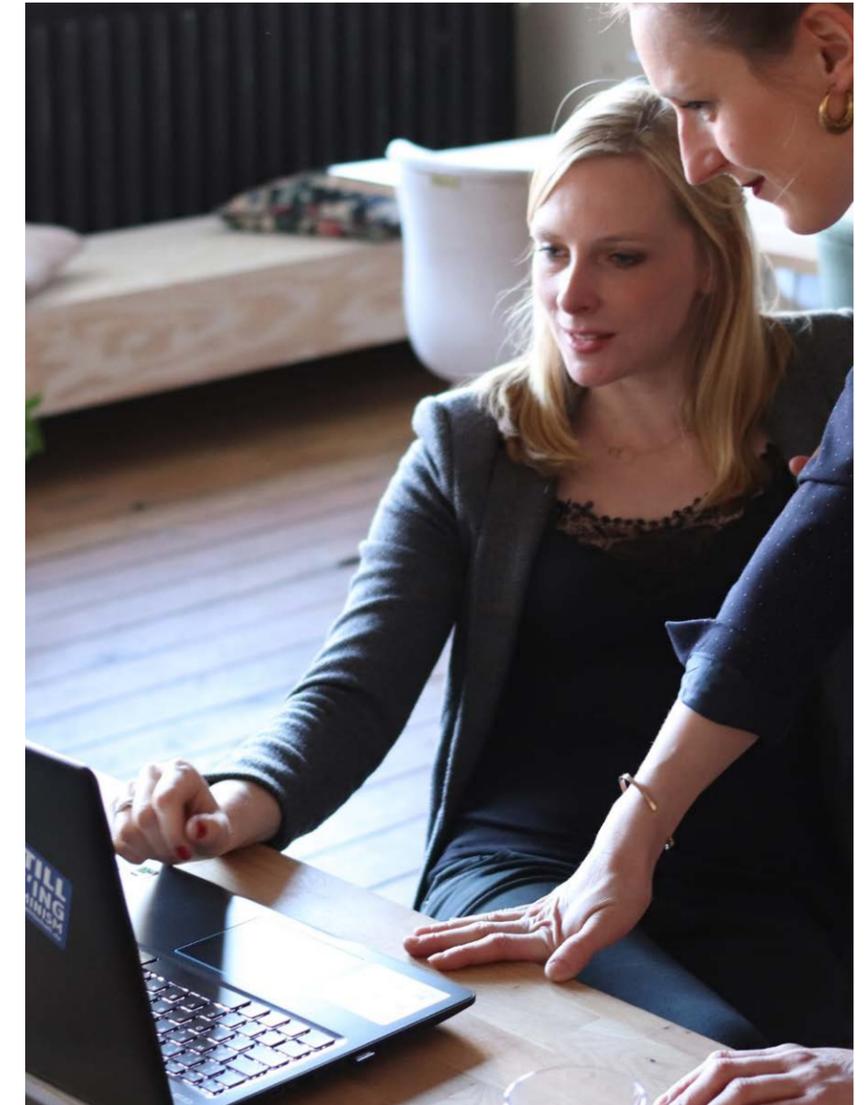
Black

17%

Latinx

70%

Low-to-middle income



For every \$1 in tuition, we produce \$4 in wage gain in the first twelve months.

PRODUCT OUTCOMES

OUTCOME 1: DEMOCRATIZING ACCESS TO LIFE-CHANGING CAREERS

DESCRIPTION: Students who have gone through the course; placement rate; types of companies.

Students who have gone through the course: **340** graduates.

Placement rate: **90%**

Types of companies: Growing SaaS and software companies

Role: Sales-development Representative

OUTCOME 2: INCREASING DIVERSITY IN TECH

DESCRIPTION: Diversity metrics: demographic data, plus first-generation college students' data.

25% Black

17% Latinx

42% Students of color

70% First in the family to graduate from college

80% Under 30 years old

OUTCOME 3: INCOME EXPANSION

DESCRIPTION: Total value of offers generated, income-expansion rate, average salary and promotion stats.

Total value of offers generated: Over **\$40** million.

Average incoming income: **\$40k**

Average post-program, first salary package: **\$80k**

Average salary after one year: **\$93k**

Promotion stats: **60%** received promotion within 12 months.

1 HOW SV ACADEMY HELPED HANDSHAKE FIND BETTER SDRs, FASTER

Handshake reports that it found quality SDRs through SV Academy more than 50% faster, and, of the candidates hired, SV Academy SDRs started hitting quotas 25% faster than its peers.

For the team at Handshake, a fast-growing community-career platform for college students and recent grads, finding sales and development talent was proving a difficult task. Like many businesses, its candidate pool was lacking SDRs who were truly motivated, polished, and engaged. That's where SV Academy stepped in. ...

“Working with SV Academy makes filling the top of the funnel dramatically easier. We consistently get a pipeline of high-quality, motivated candidates for our SDR roles, and we have been able to retain them and promote them internally as a result of their performance.” — Michael Harbaugh, university partnerships manager, Handshake.

With the help of SV Academy, Handshake was able to make eight key hires quickly to help fill its SDR class, despite limited time and bandwidth.

Faster hiring, immediate results.

In comparison to candidates sourced from other channels and platforms, Handshake reports that it found quality SDRs through SV Academy more than 50% faster, and of the candidates hired, SV Academy SDRs started hitting quotas 25% faster than their peers.

50% Faster Hiring

25% Faster to Hit Quotas

“SV Academy candidates are incredibly hungry. They come ready to prove themselves as hard workers who will proactively find ways to contribute. That GRIT is exactly what you need as a foundational trait in a great SDR.” — Michael Harbaugh.

The True Value of Ongoing Support

Handshake has also quickly noted one of the most unique benefits of hiring an SV Academy fellow: The year of ongoing, career coaching and support they receive. As noted by the Handshake team, this program provides value at multiple levels. ...

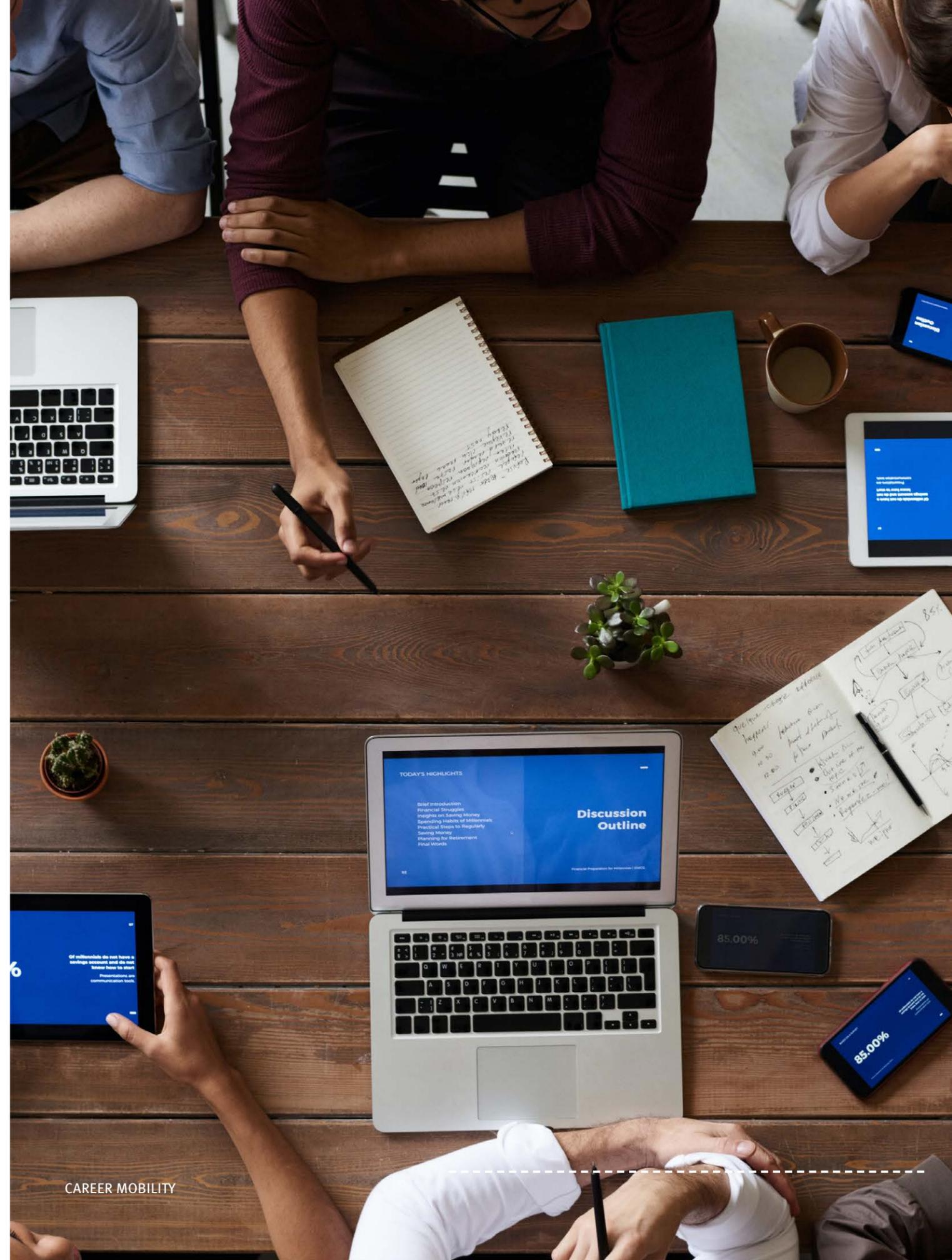
To the employer, who gets a more diverse perspective on their development.

To the manager, who gains outside perspectives on management priorities for candidates.

To the business, which is more likely to retain and promote career-coached SDRs from within.

“Our SV Academy SDRs keep their professional development top of mind — that opportunity for them to continue to be reflective and focus on areas for growth is an incredibly valuable trait to instill.”

— Michael Harbaugh



2 SV ACADEMY'S CRUCIAL ROLE DURING THE PANDEMIC

How would you say that COVID-19 has impacted the ed-tech landscape?

More and more people are looking to non-traditional forms of education as the COVID-19 pandemic has skewed the value of traditional education platforms, such as higher education. Financially, nontraditional formats are also more affordable, and are outcomes-based; for example, promising access to employment. The duration of programs is also shorter in nontraditional scopes. Furthermore, there are more open jobs which require skilled talent to fill specific roles related to SaaS, and to tech sales in general.

What specific efforts or initiatives did you launch as a company to respond to COVID-19 to better serve your users?

To provide relief to employers during the COVID-19 outbreak, and provide more access to employers who were not willing to pay a hiring fee, the Kapor Center provided a \$150K investment to allow graduated fellows to match with employers at no cost to managers.

The Kapor Center actively works to make the technology ecosystem and entrepreneurship more diverse and inclusive, so it was a close match with its mission.

Through this support, we've already had 37 fellows placed into full-time SDR roles at technology companies in the second quarter, amid one of the most challenging hiring periods in recent history.

Do you think the needs of your users have changed as a result of COVID-19? How so and how is that impacting you?

With 30 million out of work, many of whom fit our historical student profile, there is an opportunity to reskill or upskill these displaced workers at scale.

The Problem:

The COVID-19 pandemic is causing massive economic disruption, across geographies, industries and

demographics — triggering significant, unplanned downsizing of workforces, particularly in food service, customer service and retail sales. These sectors represent nearly half of the 57 million vulnerable jobs. Workers of color and younger workers have been disproportionately affected by the layoffs related to the COVID-19 pandemic.

The Opportunity:

Retail sales and customer-service workers have baseline skills that are in demand in high-level sales occupations. SaaS has been a resilient industry in the downturn, especially in large sectors like e-learning, communications, cybersecurity and network infrastructure, where there is continued need to hire for specialized skills in technology sales.

SV Academy has deep experience training and placing the populations most-impacted from workforce reductions related to the COVID-19 pandemic.

More than 60% of fellows among SV Academy's recent cohorts have previous experience in service sectors outside of the tech industry.

The demographic profile of SV Academy fellows closely matches that of job seekers who have been hardest hit: 25% African American, 17% Latinx, 70%, first in family to graduate from college; 80%, under 30 years old.

Could you provide a couple of examples of the early impact that you're seeing as a result of your COVID-19 efforts?

We placed 37 graduates into full-time SDR roles at technology companies amid the pandemic, indicating that sales and SaaS will remain resilient industries, even through massive disruptions and down cycles.

We were selected as a founding education and training partner in SkillUp, a nonprofit coalition helping the more than 40 million workers impacted by the COVID-19 pandemic to get rehired for in-demand jobs in high-growth industries.

Signed MOUs with two universities, who moved quickly to have SV Academy supplement their distance-learning offerings to provide greater value to their seniors and recent graduates.

If there were a silver lining to this pandemic as it related to ed-tech, what would it be?

New systems to help tens of millions of at-risk workers get back on their feet faster, like the SkillUp Coalition. Forcing slow-moving government entities and universities to innovate quickly in offering distance learning and funding short-term, online reskilling programs. This is evident through the CARES ACT and Education Stabilization Fund.



To provide relief to employers during the COVID-19 outbreak, SV Academy, FastCompany's #2 Most Innovate Education Company for 2020, has partnered with the Kapor Foundation to provide SDR hiring at absolutely no cost to managers.

The Kapor Center actively works to make the technology ecosystem and entrepreneurship more diverse and inclusive.

Hire the best SDRs for free

EDUCATION OUTCOMES COMMITTEE AND CONTRIBUTORS

Special thanks to the Owl Ventures Education Outcomes Committee Members and contributors who shaped this work.

The committee consists of members from family offices and institutional investors that represent endowments, universities, foundations and other strategic investors.

This group and its underlying affiliates have a global presence in dozens of countries including Australia, Brazil, Chile, China, Denmark, India, Italy, Malaysia, Mexico, Norway, Peru, Singapore, South Africa, Switzerland, UK, and the United States.



