



Impact of COVID19 on **private schools**

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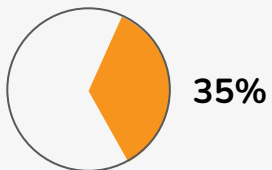


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Context

Background



Nearly half of India's school going children study in private schools with 35% enrolled in private unaided schools¹

45% of students enrolled in private unaided schools pay less than ₹500 per month and **70% pay less than ₹1,000 per month** in course fees²



Pay less than ₹ 500 per month



45%



Pay less than ₹ 1,000 per month



70%



Learning advantage in private schools is marginal, after adjusting for student background.³ Learning outcomes are worse for private school students from poorer families (lower-income quintiles)⁴

Students, teachers and school administration of affordable private schools were severely impacted by COVID-19

- Studies conducted by [UNICEF](#), [Oxfam India](#), [Global Schools Forum](#) and [ASER Centre](#) highlight the challenges faced by private schools and students enrolled in private schools in India:
 - Transitioning to online learning with limited preparedness and infrastructure
 - Staying afloat in the absence of a stable source of revenue
- Schools across fee bands have focussed on engagement initiatives to boost learning, attendance and enrolments
- Prolonged school closures due to second wave of COVID19 will further impact operations of affordable private schools and continue to negatively impact teacher salaries.

To understand the impact of COVID19 on learning and finances in the private school sector, Central Square Foundation and Omidyar Network India conducted a study with over 1100 respondents (parents, school administrators and teachers) across 20 states and Union Territories in December 2020-January 2021



Executive Summary

Key Highlights

Schools attempt to continue education through online classes, however, parents and students find it difficult to adapt to the new-normal



The private school sector received little support to move to a new normal. Teachers adapt to at-home schools with limited infrastructure and training for online education

- Only **50-60% teachers** were trained to make online videos, pre-recorded content, and share content through various tools



Schools continue to keep students engaged with lessons, extra curriculums, etc.

- Students' mental health emerges as a key focus area because of lack of playtime and social interactions with peers
- Inputs delivered by schools have not translated to outcomes- as measured by parent perception of online learning

The sector is struggling financially. Schools made concessions for parents who can't pay fees. Demand for private schools is unlikely to reduce drastically in the medium term



Most schools have reduced fees or delayed payments to retain their students and teachers suffered a salary cut

- School revenue decreased between **20-50%**
- **~40% teachers'** salaries were put on hold for at least **3 months**



Parents continue to prefer private school education and demand for private schools remains strong

- 78% parents expressed that they will continue to send their children to private schools despite their inability to afford fees



Short term policy response

Private school sector needs policy support to recover from learning loss and financial instability caused during COVID-19. Possible response includes:

- Active inclusion of private schools for **dissemination of free EdTech products and State-led home learning, teacher training and life-skills programs**
- **Access to state-run learning, teacher training, remediation and life-skills programs** to private schools when schools reopen
- **Relaxation of pre-COVID19 regulatory restrictions** on operations and fees to **allow the sector to recover from losses** and ensure access to education for over **6 Crore** children who are serviced by non-elite private schools in India and pay less than Rs. 1000 per month as course fee
- **Ease credit availability** for private schools through relief packages with similar benefits as provided to Micro, Small, or Medium enterprises (MSMEs)
- Provide **tax rebate on device purchase** for families with school-going children



Research Methodology



OBJECTIVES

1. To develop a deeper understanding of the short and medium term impact of COVID-19 on Parents, Schools and Teachers in non-elite private schools in India
2. To enable policy makers, donors and all other stakeholders to understand the challenges, coping mechanisms and economic situation of the private school sector in India

Research Themes:



Learning in Private schools during COVID-19

1. How did schools, parents and teachers transition to online learning? What is their experience with online learning?
2. Do private schools have the technology to deliver online education?
3. Do parents have the facilities to engage their children in remote learning?
4. Do teachers have the skills and facilities to deliver online classes?



School finances during COVID-19

1. How did COVID-19 impact school finances across the low fee sector?
2. How is COVID-19 impacting job security for teachers and enrolment levels in low-fee private schools?
3. What are the most urgent financial needs of the stakeholders of the low-fee school sector?



Survey Methodology

Structured telephonic interviews and online survey forms were used for the study

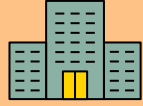


Limitations

Schools that were surveyed were sourced from online databases since COVID-19 limited the scope of in-person sourcing of school contact information. The implication is that impact on lower fee schools will likely be underestimated



Respondent Profile



School administrators

246 school leaders surveyed

- 35% charged less than ₹ 800 monthly school fees*
- 65% charged more than ₹ 800 (55% in the ₹ 800 - ₹ 2,000 school fee band)

61% from urban, 39% from rural areas

- Rural schools charge an average monthly fee of ₹ 1,100, urban schools charge an average monthly fee of ₹ 1,300



Teachers

478 teachers surveyed

- 28% from schools that charged less than ₹ 800 monthly fee and 72% from schools that charged more than ₹ 800 monthly fee

82% from urban, 18% from rural areas

- Urban teachers are paid ₹ 25-27k per month
- Rural teachers are paid ₹ 20-22k per month



Parents

400 parents surveyed

- Household income was less than 3LPA for 60% and 3-8LPA for 40% respondents
- Over 90% parents had at-least one child in grade 1-8
- In 25% households both the parents were employed

40% parents surveyed from rural 60% from urban areas

58% parents pay less than ₹ 1500 school fee

88% parents have an undergraduate degree, diploma or postgraduate degree

Note: Cutoff for Low fee and high fee classification was determined as per the NSSO data ~50% of students in private schools pay less than ₹ 800 a month as fees.

For the purpose of this study, urban/rural classification is on the basis of the U-DISE definition, which says, if the area where the school is located is covered by a Municipal Corporation it would be considered in Urban Area, otherwise, the school should be considered to be in Rural Area.

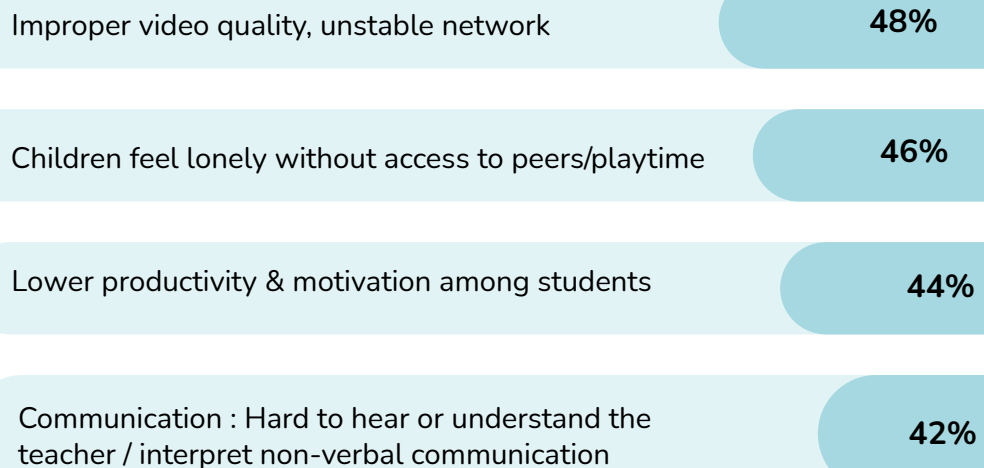


Learning losses were aggravated by poor internet connectivity, restricted access to devices and gaps in technological uptake¹

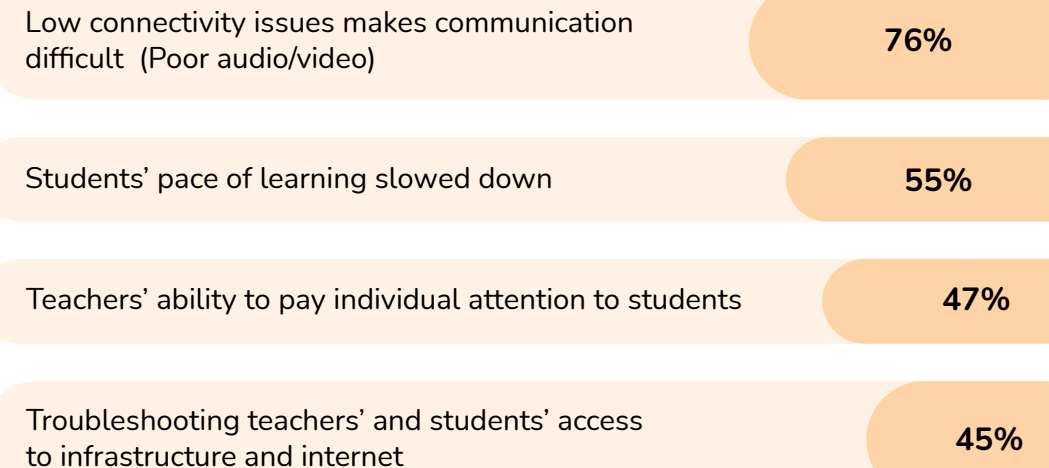
HIGHLIGHTS

- **15% parents** reported buying a separate device for their child when lockdown started; an additional **15% reported** buying the 1st shared smartphone in the house
- Half the parents highlighted poor internet connectivity as an obstacle to remote learning
- Access to Internet for students in private schools is overwhelmingly dependent on mobile data for **64% households**
- **~70% teachers** reported using their personal devices during the lockdown
- **6% parents** reported that their children haven't attended school since the lockdown

Top 4 challenges faced by children with remote learning



Top 4 Challenges faced by schools with remote learning



Note: All the parents surveyed had access to internet (wifi/ mobile data/ both)

Source: Status Report- Government and private schools during COVID-19, Oxfam; ASER 2020, ASER Centre

Question: What are the challenges that your child has faced with remote learning?, What are the key challenges that the school is facing with remote learning?

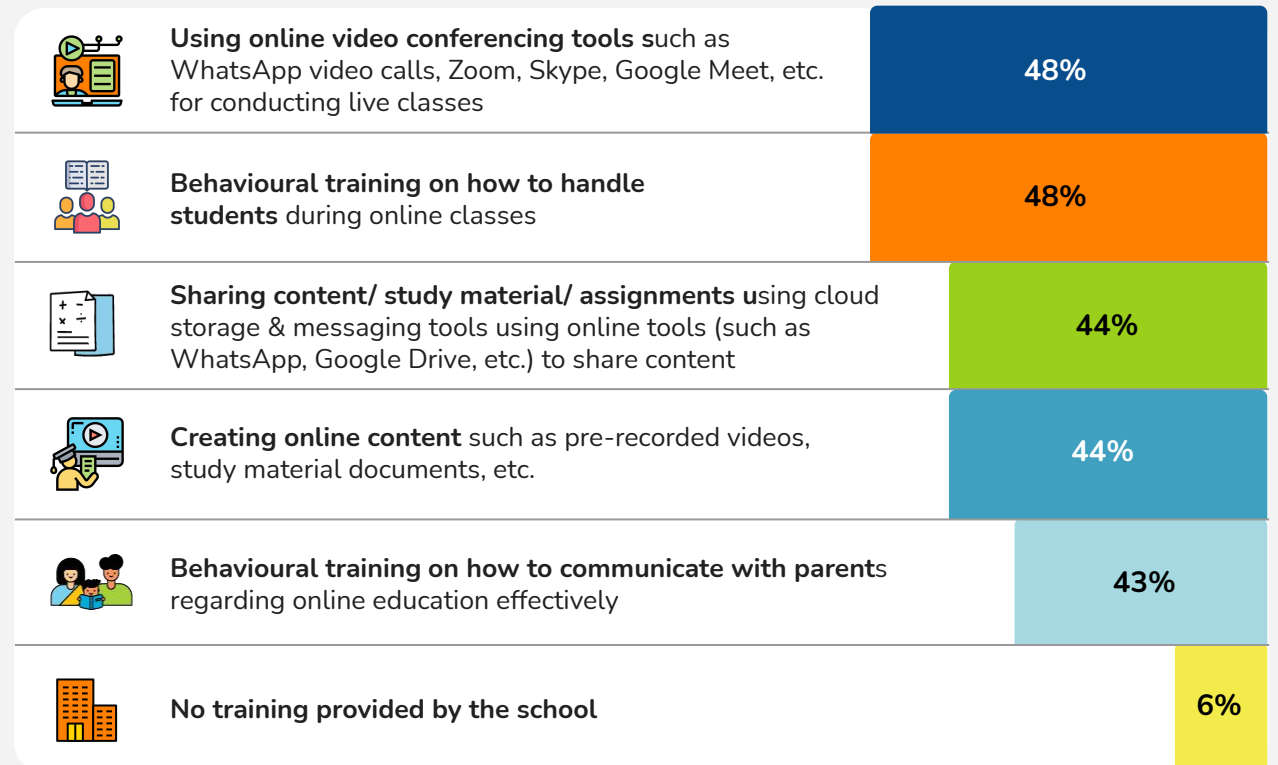


Over 90% schools conducted trainings for teachers to deliver online education, however, online learning has been a challenging experience

HIGHLIGHTS

- **50-60% of teachers** received technical training to make online videos, pre-recorded content, and share content through various tools
- However, teacher training for technology usage and tracking individual student progress in a virtual classroom setting emerged as primary parent concern
 - **~30% parents** felt that teachers pay individual attention to the child's educational needs
 - **30% parents** reported inconsistent teaching quality as a concern due to varying comfort levels of teachers with technology

Scope of teacher training to support remote learning



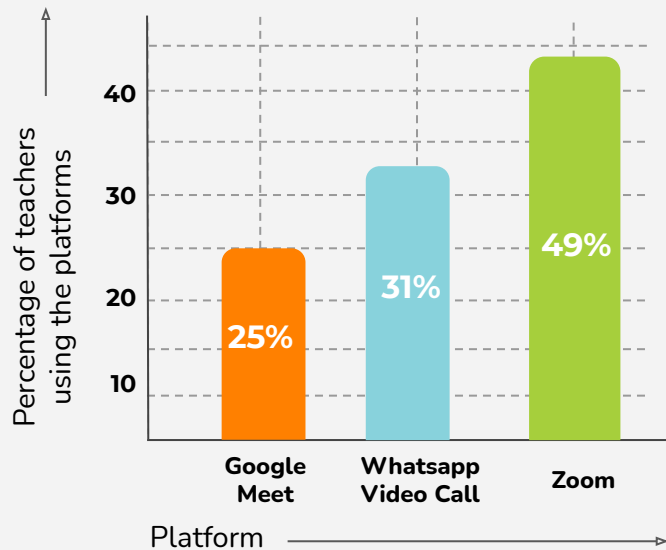


Live video lectures and their recordings have been the predominant mode of teaching

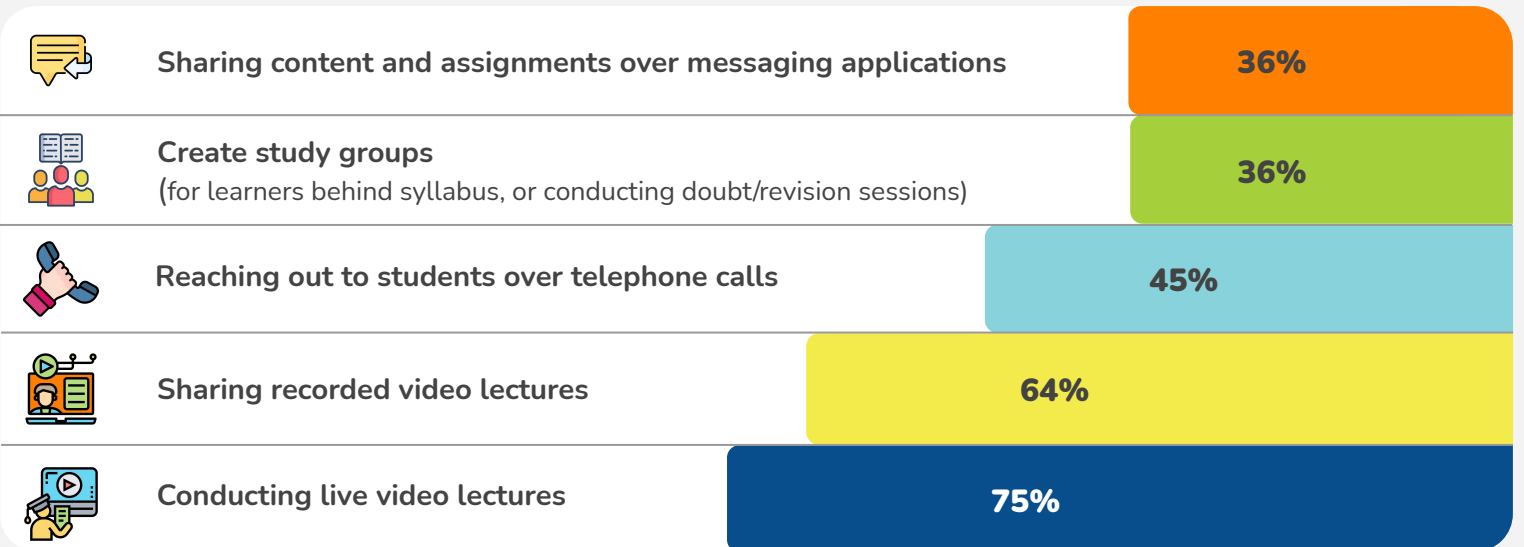
HIGHLIGHTS

- **67% teachers** use digital tools for learning management/ online education everyday
- **~15% of the private schools** are conducting classes through paid applications or using supplementary platforms such as Byju's, Vedantu, Toppr, etc. indicating that the capacity to utilize paid digital content and platforms is still limited
- More than **50% of the schools** are conducting live video lectures and nearly 75% sharing recorded video lectures; ~70% of schools are conducting subjective online tests
- **~35% of schools** have opened their labs to teachers so that they can teach their students by demonstrating live lab classes

Top 3 platforms used for online learning



Top 5 Pedagogical techniques employed by teachers to continue teaching students during the pandemic





Schools have focussed on engagement initiatives to boost learning, attendance and enrolments; Only 18% parents felt the online education had a positive impact on their child in the long term

HIGHLIGHTS

- **66% teachers** report that student attendance before and after lockdown has remained same, 22% see an increase in regularity and 12% report a decrease
- **~40% of teachers** reported that students are unable to clear their doubts virtually
- To encourage higher engagement levels from students and parents, **~50% of schools** are focusing on extracurricular activities such as online cultural events and virtual games, nearly **45% teachers** reached out to students through phone calls
- More than 50% of urban schools communicate regularly with their students through doubt classes, revision classes, and unit tests. **~80% of the rural schools** have connected with their students at least once to take revision classes, doubt classes, and tests

Parents' perception of online education: What's working



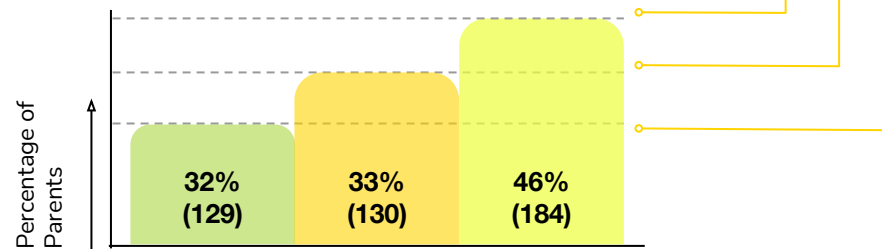
Teacher is able to pay individual attention to my child's needs (personalization of content or approach)



Better syllabus coverage



Safety from other communicable disease (other than Covid 19)



Parents' perception of online education: What's not working



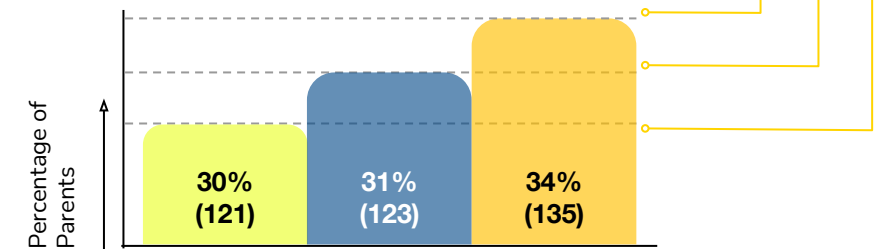
Lack of proper tracking of child's progress in the online classes setup



Students are not attentive and sincere in a home based learning setup



Lack of physical presence of a teacher leads to child not getting personalised attention (e.g., with doubt solving)





Impact of **COVID-19** on
school finances and
sustainability of private
schools



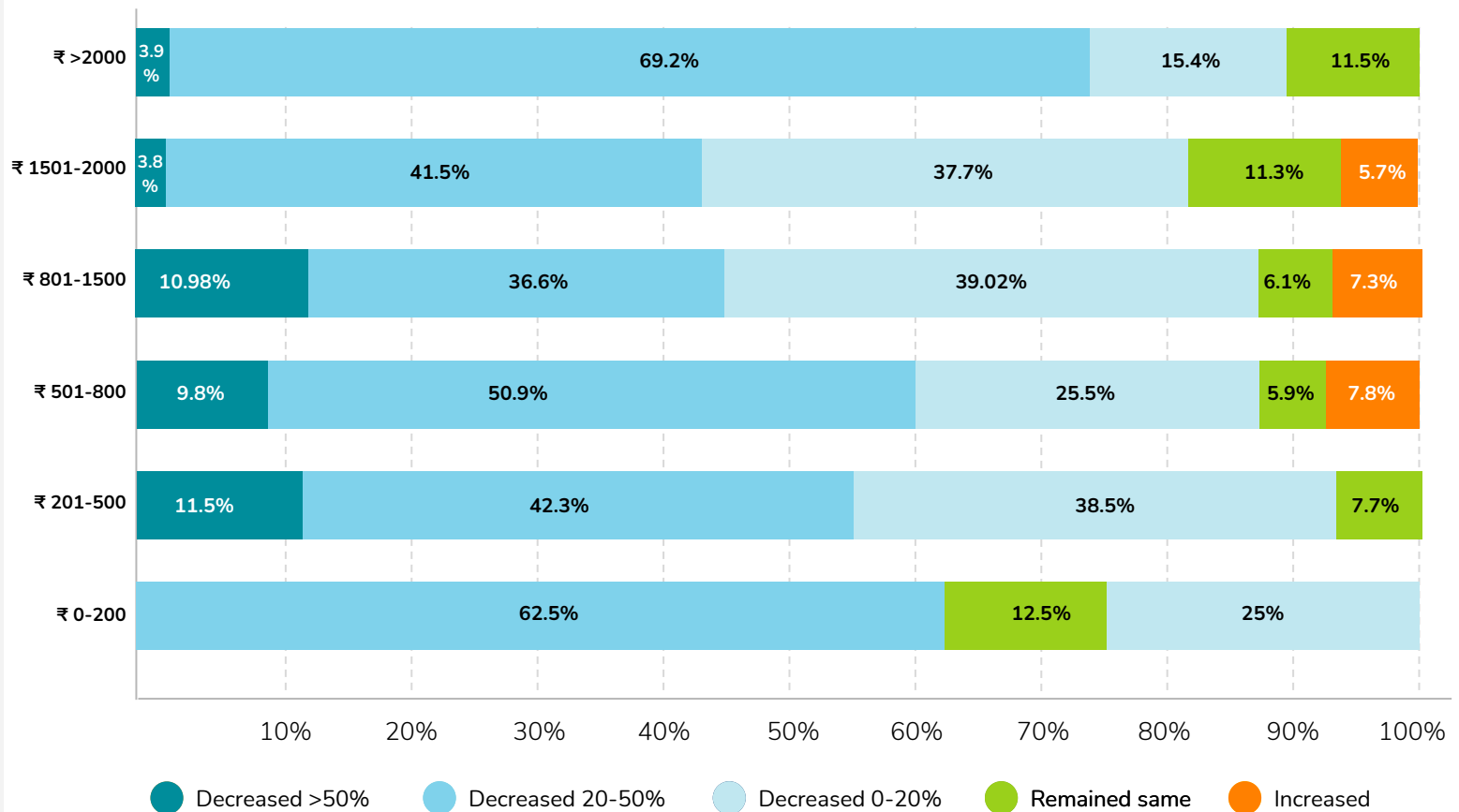


Revenue decreased in the range of 20-50% for most schools but the cost heads have largely remained the same, thus making it difficult to continue operations seamlessly

HIGHLIGHTS

- Schools' revenues were hit by the inability of parents to pay fees regularly. This was highest among the urban schools
 - If parents don't pay fees on time, schools are allowing parents more time to pay fees and reducing the fee for the next quarter
 - Across fee bands, majority schools saw a decrease in revenue
- Three-fourths schools have faced delays in RTE 12(1)(C) reimbursements
- **~90% of schools** collect fees in cash and **10% collect fees** through online mode of payment such as Credit Card, Debit Card, Netbanking & UPI
- **77% of schools** were not interested in taking a loan to support school finances during COVID-19
 - **Only 3% schools** have successfully accessed loans and **5% are waiting for their loan** to get processed
 - Preferred source of loan is a public sector bank and the least preferred source is a NBFC

Impact on schools' revenue during COVID-19 for low fee and high fee schools



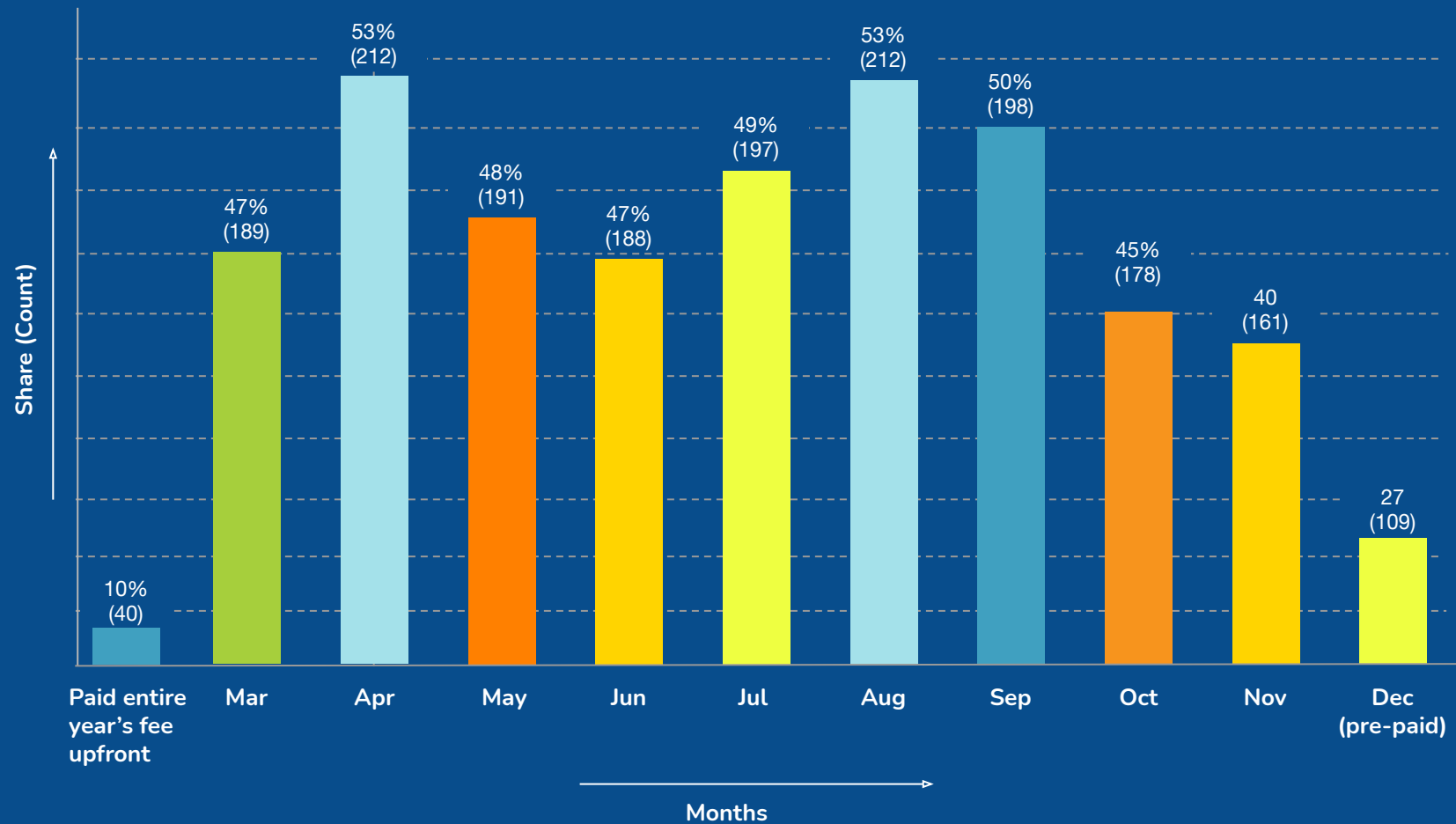


While parents faced financial distress due to COVID-19, they have chosen to continue private education for their children

HIGHLIGHTS

- Over **70% parents** reported that school fee remained the same; only **50% parents** reported paying school fee indicating a massive dent to school revenues during the academic year
- **20% parents** reported an increased expenditure on technology/infrastructure and 15% reported increased education expenses
- **78% parents** reported that they will be able to continue to afford their child's education at the same school
- **~55% of schools** suggest that there was a major reduction in the number of new admissions in this academic year

Months during which parents reported paying school fees



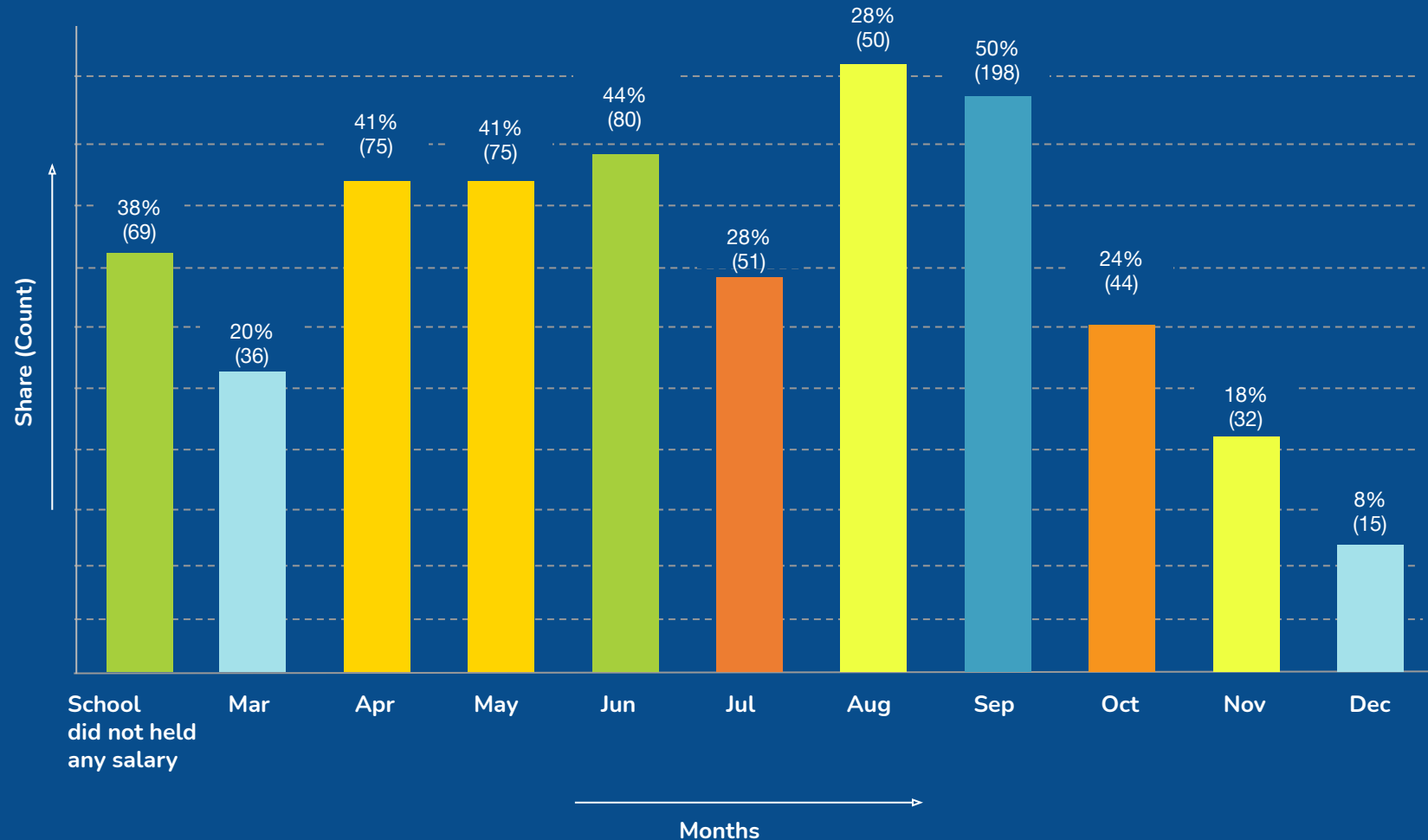


~55% teachers across private schools faced a reduction in salary during the lockdown.
Schools paid teachers partially since other cost heads (bills, rent, etc.) couldn't be avoided

HIGHLIGHTS

- **54% teachers** do not have an alternate source of income, **30% supplemented** their salary with private tutoring/coaching
- **~65% teachers'** salaries were put on hold by low fee schools as compared to **37% teachers** whose salaries were put on hold by high fee schools
- **~55% teachers** are highly confident that their school will be able to continue operation till the situation returns to normal. The confidence level significantly reduces among rural school teachers and low fee school teacher

Months during which teacher salary was put on hold





COVID-19 led to some shifts in teaching-learning

- Parents have new roles in facilitating learning
- Students' **mental health** emerges as an important issue





Parents were forced to manage work disruptions in order to facilitate online classes for children; and found themselves incapable of supporting their children with academics



30%

More than **30% of parents** highlighted that students are not attentive and sincere in a home based learning setup



40%

More than **40% parents** expressed inability to help the child academically



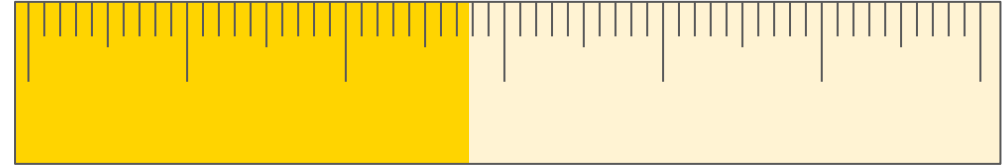
49%

49% parents reported that their work was disrupted because of the time spent guiding their children





Mental health has emerged as an area to focus on to combat the psychological impact of the lockdown and school closures

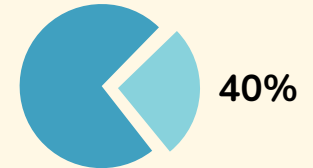


44%

Lower productivity & motivation among students (distraction / only work and no play) also emerged as a key focus area with **44% of parents** facing this issue



46% parents reported children feeling lonely due to lack of interaction with friends/peers - this was the biggest issue for children in grades 1-5



~40% of teachers reported that lack of inter-student interaction is reducing students' social skills



Private schools require urgent support on both learning and school finances



Short Term

- 1 Active inclusion of private schools for dissemination of free EdTech products/State-led at-home learning and teacher training programs (English/regional languages)
- 2 Access to state-run learning, teacher training, remediation and life-skills programs to private schools when schools reopen
- 3 Relaxation of pre-COVID19 regulatory restrictions on operations and fees to allow the sector to recover from losses
- 4 Ease credit availability to private schools through relief packages with similar benefits as provided to Micro, Small, or Medium enterprises (MSMEs)
- 5 Provide tax rebate on device purchase for families with school-going children



Medium Term

Accelerate implementation of the **National Education Policy, 2020** recommendations to improve quality in the private school sector:

- 1 Include Private schools in school examinations for grades 3, 5 and 8 to create a universal learning indicator to help parents compare learning performance across schools and make informed decisions
- 2 Develop a pragmatic accreditation framework to ease operating environment for private schools while focussing on learning outcomes and child safety

About Central Square Foundation, Omidyar Network India and RedCore



Central Square Foundation (CSF) is a non-profit organisation working towards ensuring quality school education for all children in India.



Omidyar Network India (ONI) invests in bold entrepreneurs who help create a meaningful life for every Indian, especially the hundreds of millions of Indians in low-income and lower-middle-income populations, ranging from the poorest among us to the existing middle class.



RedCore is the in-house research arm of RedSeer Consulting, proficient in executing actionable customer research. A leading strategic knowledge partner for global consulting firms, funds and corporate.

Comments or Questions

We welcome your feedback on this report. Please write to us with your comments or questions to privateschoolsreport@centralsquarefoundation.org

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