COLIVER WYMAN

EDUCATION IN THE NEW NORMAL

Education leadership response to COVID-19

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THE PANDEMIC HAS RESULTED IN AN UNPRECEDENTED CHANGE TO THE EDUCATION SYSTEM, RESULTING IN A NEW REALITY

Governments have enacted varied responses to Covid-19 across multiple dimensions



Policy Response

Ensuring a well coordinated response and enacting emergency measures, e.g. mass closures of academic institutions



Structural Response

Activating distance learning solutions and supporting infrastructure, e.g. delaying, cancelling exams, adapting promotions



Social Response

Delivering solutions to meet the needs of students, educators, parents, and education leaders, e.g. providing childcare support



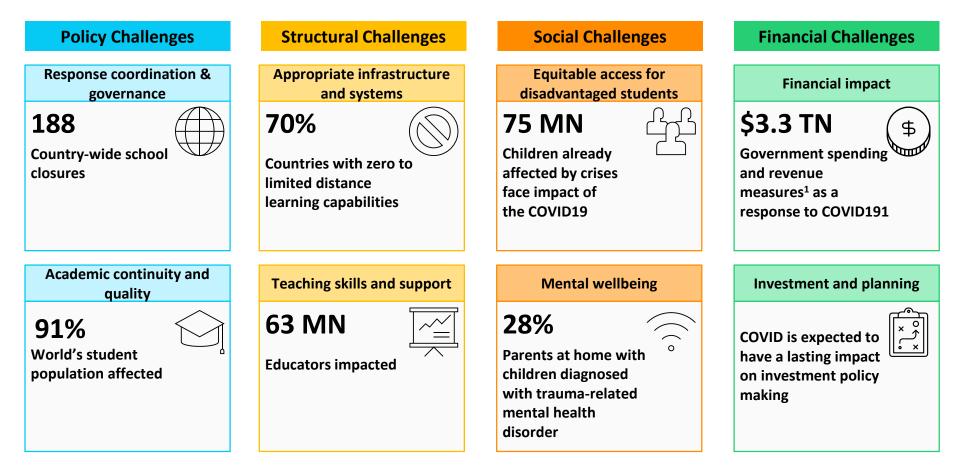
Financial Response

Ensuring availability and accessibility of distance learning solutions through investment and partnership

Governments are continually adapting their responses to address the rapidly evolving nature of the outbreak. International Organizations (IOs) are also mobilizing resources in support of these efforts

COVID-19 HAS CREATED CHALLENGES TO THE EDUCATION SYSTEM SPANNING FOUR DIMENSIONS: POLICY, STRUCTURAL, SOCIAL AND FINANCIAL

Governments face a number of significant challenges



Source: UNESCO Covid-19 Global Education Coalition, World Economic Forum, UNCTAD, IMF, Education Cannot Wait

1. Total government spending and revenue measures

AS THE CRISIS EVOLVES, LEADERS SHOULD CHANGE THE FOCUS OF THEIR RESPONSE TO SUIT THE PUBLIC NEEDS

Short term (4-12 weeks)

Act in the public interest

- Ensure protection and safety of students and employees
- Mitigate disruption to learning
- Communicate effectively



Function as part of a broader

system

- Create effective pathways for coordination with new partners
- Proactively ask for information you need & bring solutions

Protect

Medium term (3-6 months)



Ensure education continuity

- Scale up deployed tools
- Avoid exacerbating inequality
- Evaluate and adjust



Meet evolving challenges in real time

- Innovate & pilot
- Relax standards and guidance
- Build new partnerships

Long term (6 months – 2 years)

Build resilience for "the new normal"

- Develop contingency plans
- Prepare for cyclical shutdowns
- Redevelop standards & guidance



Responsibly steward public resources

- Strengthen effective partnerships
- Solicit feedback & evaluate
- Review and adjust budgets and plans



Sources: UNESCO - SDG4 Education; Center for Global Development; Harvard University Center for International Development Building State Capability (BSC) program; The Brookings Institution; Inter-agency Network for Education in Emergencies (INEE); Global Partnership for Education; Oliver Wyman analysis © Oliver Wyman

Adapt

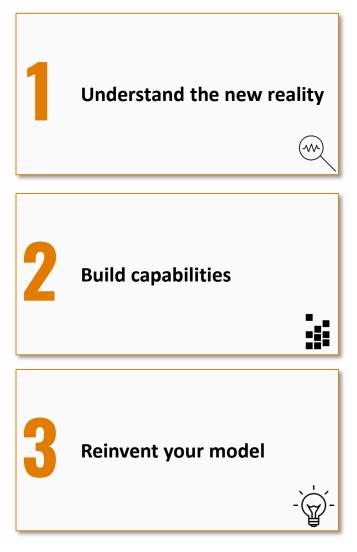
WE HAVE DEVELOPED A COMPREHENSIVE FRAMEWORK TO ASSIST LEADERS TO MITIGATE AND EVEN HARNESS THIS NEW REALITY

Education leadership detailed response framework

Policy for resilience	Structural & delivery	Social	Financial
Academic Continuity	□ Infrastructure └	Equitable Access	Financial support
Organization and Governance	Teaching Standards and Skills	Extracurricular Social Support	Budgeting & Planning
Policy Transparency & Stakeholder Communication	Syllabus & Assessment Flexibility	Family Support	- Investment & Innovation

Core initiatives under the response framework dimensions are detailed in Chapter 2

A HOLISTIC AND PROACTIVE APPROACH IS RECOMMENDED TO ENSURE IMMEDIATE CRISIS REMEDIATION AS WELL AS A SMOOTH TRANSITION TO THE "NEW NORMAL"



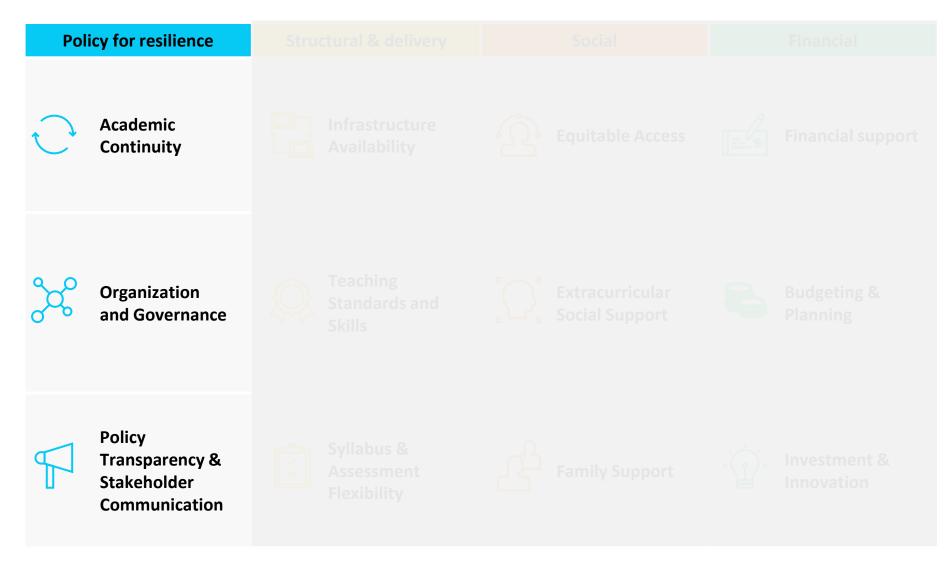
- Conduct **stock take** against the detailed response framework to understand **scope** and **scale of impact** on education system
- Mitigate immediate impact of crisis from a **policy, structural, social** and **financial** perspective
- Define education system **new reality** and determine gap to reach future target state
- Invest in building human capital capabilities and ensure uniform teaching standards and skills for digital education delivery
- Ensure **availability of infrastructure** and technology for distance learning and develop a **full suite** of online learning platforms
- Activate **network of experts**, **innovators** and **companies** to support model re-design
- Engage with parents, teachers & students to design new normal
- Focus on **equitable access** to education for the vulnerable and disadvantaged

EDUCATION LEADERSHIP CORE INITIATIVES IN RESPONSE TO COVID-19

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CORE INITIATIVES DIMENSION: POLICY FOR RESILIENCE



CORE INITIATIVES 1. ACADEMIC CONTINUITY

C CONTINUI	ΓΥ			Policy dimensio												
		Short term (4-12 weeks)	Medium term (3-6 months)	Long term (6 mo. – 2 years)												
y y measures in the .g. school closures)		Provide guidance for acceptable online learning and communication platforms and	Create policies to support flexible learning pathways and timelines	Integrate online/distance learning in the education system												
g the second wave erm measure to		encourage trial and error	Develop replacements for													
-			hands-on experiential learning (e.g. science experiments,	Institute "early warning												
n stemic upheaval	> [testing	music education, field trips)	system " to gauge infection rates and trigger emergency	
academic progress		2	2	2	2	>	2		>	>	>	2	>			Develop scheduling to enable
tools not tailored to earners		Allow flexibility for curricular requirements that require	rotating cohorts of students in													
r of normal d quality tools		hands-on or in-person learning	school and/or recurring school closures	Develop full-scale contingency												
g timelines with staggered opening rates		Enable both synchronous and asynchronous learning/teaching modalities	Relax the requirement of practicum hours for current teacher candidates	planning for extensive social distancing and/or repeated school closures												

Recommendation

Academic continuity

 Enact emergency measures in the public interest (e.g. school closures) while suppressing the second wave and taking long term measure to ensure resilience

Imperatives for action

- Unprecedented systemic upheaval
- Risks to students' academic progress
- Distance learning tools not tailored to different types of learners
- Lack of availability of normal administrative and quality tools
- Unclear & evolving timelines with cyclical closings / staggered opening based on infection rates

Examples



Countries such as Italy, France UAE and KSA, **mandated national school closures** at the primary, secondary and tertiary levels



In Canada, USA, Russia and Australia **school closure decisions vary across states and territories**, as authority is decentralized *1

China imposed **strict measures when reopening schools**: masks, temperature checks, class ventilation, staggered dismissals, disinfection, class redistribution, etc.



Primary schools in Denmark **reopened under strict rules**: desks 2 m apart, 10 students per class, limited number of playmates, handwashing every 2 hours, sharing lunch not allowed, etc.



CORE INITIATIVES 2. ORGANIZATION & GOVERNANCE

Policv dimension

Recommendation Short term (4-12 weeks) Medium term (3-6 months) Long term (6 mo. – 2 years) Establish central steering **Organization & governance** committee within Education Establish a central steering Ministries to coordinate committee that coordinates Introduce task-forces to focus response education and public health and on specific responses, e.g. safety responses education task-force, Identify key public sector healthcare task-force, etc. Introduce emergency officials outside of MoE to be committees and public sector involved in coordination: Imperatives for action governance & coordinate identify key experts and mechanisms as part of revised • No dedicated emergency response partners to have on call and coordination team linked to top senior leadership office (education & health structure and functions to officials within Education professionals, Identify key decisions and ensure future crisis • No existing mechanisms for parent/community leaders, anticipated time frames, preparedness coordination across education, public private sector) including check-ins to revisit health, finance and others early emergency measures • Need for rapid information-sharing, Define **communication** and/or prepare for "2nd channels, protocols and decision-making, and policy wave" frequency; assign coordination

Examples



Arkansas created the Arkansas Economic Recovery Task Force with 3 committees, one of which is dedicated to agriculture, grocery and education

responsibilities



Kentucky established an Education Continuation Task Force to work on issues that arise during this unprecedented time in education and strive to meet the educational needs of students and teachers



Bahrain has set up a dedicated National Taskforce to tackle the spread of the virus, coordinating response with various stakeholders including education leaders

CORE INITIATIVES 3. POLICY TRANSPARENCY & STAKEHOLDER COMMUNICATION



Policy dimension

Recommendation

Policy transparency & stakeholder communication

 Create a communications strategy/plan to support execution of education response

Imperatives for action

- Inadequate communication channels in place to effectively engage all stakeholders
- Lack of crisis communication capabilities linked to senior leadership at Ministries of Education

Short term (4-12 weeks)

Define communication channels and mechanisms for different stakeholder groups: officials, employees, students/families

Set **clear guidelines** for engagement with stakeholder groups with clear guidelines: purpose (information vs action), format, frequency, channels

Establish 'communications tree' to disseminate information & collect feedback at national, local, and institution/school levels Refine **communication mechanisms**, e.g. partnering with private sector to develop information app

Medium term (3-6 months)

Build **communications capabilities** within leadership staff – shift from reactive to proactive approach

Long term (6 mo. – 2 years)

Develop robust emergency and non-emergency communication plans,

guidelines, systems, and capabilities with appropriate authorities and responsibilities (fully pro-active)

Examples

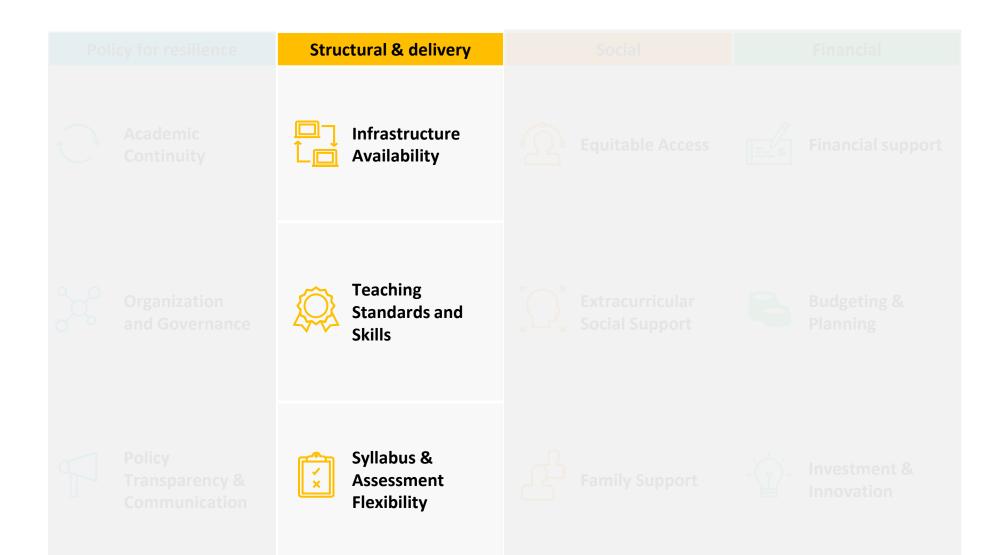


UK has launched a **COVID-19 national communication campaign** to ensure timely, factual and consistent information is provided to encourage the public, and the health and aged care sectors, to adopt behaviours that will prevent and mitigate the impacts of COVID-19



In China, careful planning and clear communication lessened the impact of COVID-19. China **established centralized reporting and communication channels** to keep citizens informed – e.g. in Hangzhou, the major news outlet provides daily updates on cases, clinical treatment outcomes, and guidelines and procedures to follow

CORE INITIATIVES DIMENSION: STRUCTURAL & DELIVERY



CORE INITIATIVES 4. INFRASTRUCTURE AVAILABILITY



Structural dimension

Recommendation

Infrastructure availability

 Build/ensure necessary infrastructure to mobilize distance learning solutions

Imperatives for action

- Inadequate systems in place deliver distance education effectively and quickly
- Preponderance of technical expertise in private rather than public sector
- Significant variability in access for disadvantaged/ vulnerable students

Short term (4-12 weeks)

Launch **national education portals** for centralized learning resources

Trial a variety of **delivery** systems/platforms without long-term commitment

Implement monitoring & evaluation mechanisms to gauge user feedback and learning efficacy

Engage **platform providers** as partners

Broadcast lessons and classes on national television and radio

Medium term (3-6 months)

Partner with experts and private enterprises to develop a full suite of online learning, testing, and broadcasting platforms – multiple platforms may be needed to cover specialist functions; focus on interoperability and simplicity

Coordinate with **other authorities and private internet providers** to fill gaps and reduce costs of internet access

Long term (6 mo. – 2 years)

Release **technical guidelines** for online platforms – including safety and privacy controls

Develop "**preferred provider**" list and streamlined licensing to enable scale up and scale down

Redefine education system infrastructure and components to leverage online learning

Examples



In Italy, China, Germany and KSA, the government launched **dedicated education portals**



In USA and Japan, schools have independently introduced online learning programs



France, Oman, Qatar, Dominican Republic and Colombia are **providing education material on TV & radio**, reaching children without internet or devices



In South Korea, provision of free data services for education websites is done in **partnership with the private sector**

CORE INITIATIVES 5. TEACHING STANDARDS AND SKILLS



Structural dimension

Recommendation Short term (4-12 weeks) Medium term (3-6 months) Long term (6 mo. – 2 years) **Teaching standards and skills** Provide teachers in **remote** Develop guidelines for Change **teaching** and low-income areas with • Provide teachers with skills and practitioners on creating and requirements to include technology, devices, & free/ competencies needed for distance managing online classrooms online teaching skills as a preboosted internet connection teaching requisite Partner with private training Introduce online teacher providers to standardize Imperatives for action training sessions teacher digital training • Teachers unfamiliar with new Develop standards for technology and tools online/distance teaching Curricular elements to be re-Require preferred platforms Provide teachers with quality developed for online learning to create online user/teacher digital education content training modules Fundamental shifts in teacher-child • interactions Conduct evaluations to gauge Redesign of quality assurance and efficacy of online teaching, • Enable peer exchange across Accredit and incorporate new assessment methods content development, and education professionals to training into ongoing guided vs independent Affects teachers' professional professional development share experience, resources, learning credits and requirements development and feedback

Examples



Italy established a website dedicated to providing **guidance to practitioners**, students and families on educational response



South Korea created platform "School-On" to provide guidance on creating and managing online classrooms



KSA launched **remote teaching award** to promote excellence in remote teaching and quality online educational content



UK launched **teacher webinars** to support them in the adoption of distance learning method



France launched "Learning Nation" to provide teachers, students & families with **quality schoollinked programs**

CORE INITIATIVES 6. SYLLABUS & ASSESSMENT FLEXIBILITY



Structural dimension

Recommendation

Syllabus & assessment flexibility

 Adjust syllabus to prioritize learning goals during distance learning, modify calendar and promotion requirements, provide remote assessment tools

Imperatives for action

- Time constraint to complete syllabus
- Lack of adequate tools to remotely assess remote learning efficiency and make promotion/graduation decisions
- Teacher assessment required to evaluate efficiency of online teaching
- Delaying promotions would affect school capacity planning in fall 2020 and college and university admissions

Short term (4-12 weeks)

Prioritize essential learning objectives during distance learning & update graduation requirements and calendar

Adjust/stagger school schedules to avoid crowding; adjust spring and summer holidays as contingency

Postpone, cancel, or allow online exams

Develop student and teacher assessment tools suitable for remote learning

Medium term (3-6 months)

Modify graduation & tertiary admissions requirements

Provide additional classes & summer sessions to make-up for lost days of learning ("scale back, stretch out")

Schedule children in **cohorts** and **rotate in-school schedule**

Stagger test dates by random selection to reduce crowding; schedule additional exam dates

Partner with private assessment providers to standardize digital assessment tools (e.g. identity verification)

Long term (6 mo. – 2 years)

Integrate **online examination** in the education system (reduce reliance on face-toface proctoring)

Integrate remote assessment mechanisms into education system infrastructure and components

Introduce **flexibility in curriculum** requirements to support future distance learning cycles

Ensure **earmarked places** and remediation for disadvantaged students in future admissions processes

Examples



In Australia, most schools are allowed to make changes to their syllabus, e.g., modify schoolleaving qualifications, etc. In South Korea, the **school calendar is being adjusted** to accommodate lost days of learning

noolIn Bulgaria, the government issted toupdating legislation concerningrs ofgrading and assessment in orderto take into account the distancelearning context



In the UK, 6th year med. school students have **taken their exams** online

CORE INITIATIVES DIMENSION: SOCIAL

	Social	Financial
	Equitable Access	
	Extracurricular Social Support	
	Family Support	

CORE INITIATIVES 7. EQUITABLE ACCESS



Social dimension

Recommendation

Equitable access

 Ensure equitable access to content, particularly for vulnerable and disadvantaged groups, to avoid "the lost year"

Imperatives for action

- Connectivity barrier to education
- Students unfamiliar with new technology and tools
- Risk of digital divide widening; disadvantaged and vulnerable students particularly at risk
- Poorly performing students risk falling further behind
- Adolescent girls disproportionately affected further entrenching gender gaps in education

Short term (4-12 weeks)

Provide low-income families & vulnerable students with **technology** (e.g. computers, free/low-cost internet)

Conduct rapid assessment of **special needs students** and create task force to highlight gaps and coordinate support

Hire additional specialists to provide **1-to-1 support** for students in need of extra support

Consider **low-tech approach** in contexts where digital solutions and less accessible (e.g. radio, TV)

Medium term (3-6 months)

Partner with **private internet providers** to make internet free and available for lowincome families

Align with authorities to allow students to **use libraries** under strict social distancing rules

Increase teacher-student ratio, virtual home (1-to-1) **check ins**

Work closely with teachers, staff and community to ensure inclusive methods of distance learning and call for continued investments in girls' learning

Launch **specialist platforms** & delivery mechanisms to support special needs students education continuation

Long term (6 mo. – 2 years)

Develop **specialist tools** and systems to support online/ distance learning for the disadvantaged & vulnerable

Track **performance metrics** including drop out rates of vulnerable and disadvantaged students

Plan for **additional resources** to provide select remedial support to enable students to stay with pre-crisis cohort

Create "**lost year**" task force to study, plan and develop strategy

Examples



In France and South Korea families in need were provided with **devices and WIFI** Bahrain committed to ensure remote learning for **special needs students** (WhatsApp & ClassDojo)



Qatar and Dubai launched platforms to support distance learning access for **students with disabilities**



UNESCO announced **teacher task force** to support teachers who work in remote areas or with lowincome or minority communities

CORE INITIATIVES 8. EXTRACURRICULAR SOCIAL SUPPORT



Social dimension

Recommendation	_	Short term (4-12 weeks)		Medium term (3-6 months)		Long term (6 mo. – 2 years)	
 Extracurricular social support Continue to provide social welfare benefits normally delivered through school (meals, counselling, special needs support) 		Continue to provide social welfare benefits normally deliveredIncrease funding to School food programsPartner with privation companies to delivered		Partner with private companies to deliver food to students in need	panies to deliver food to		
		Launch student meals					
Imperatives for action Low-income students are dependent 		vouchers scheme for eligible students		Partner with mental health professional to develop		Reassess the social welfare	
on social welfare (e.g. meals)	 	Provide online counselling to		platform aimed at supporting students wellbeing		system in light of learnings from COVID19	
		students					
		Launch application/platform aimed at supporting the mental wellbeing of students]	Increase counsellor/student ratio and virtual home (1-to-1) check ins			

Examples



A centrally-funded **national voucher scheme** supports schools in providing eligible pupils not attending school with food USDA has initiated a PPP in rural areas to **deliver food packages** that include food that children can prepare independently C:

The \$660k **CDC Student Meals Scheme** provides eligible students with e-vouchers to order hot meals via the GrabFood app



New Zealand government announced several apps that including supporting the **emotional wellbeing** of 13 to 24year-olds

CORE INITIATIVES 9. FAMILY SUPPORT

ecommendation		Short term (4-12 weeks)	Medium term (3-6 months)	Long term (6 mo. – 2 years)	
 Family support Offer pedagogical, psychological and/or social support to parents 		Establish direct com. channel with parents (e.g. hotline) to support online learning	Increase counsellor/parent virtual home (1-to-1) check ins	Leverage learnings from parents' experience in re-	
		Offer counselling to parents in need	to parents in need	defining the education system components and infrastructure	
Imperatives for action					
 Lack of parents pedagogical skills impacts students learning outcomes and progress 		Publish guidelines to support parents in home schooling	Partner with private companies to provide pedagogical support to parents		
Parents facing higher levels of stress and anviet					Integrate home schooling modules in curriculum and
 and anxiety Lack of modules to take advantage of home-based learning opportunities 		Provide parental training /coaching modules	Develop home-based modules as alternative to school-based	revise performance/ attainment/ curriculum	
		Expand social support to include families (e.g. meals, counselling, check-ins)	modules delivered in a home setting; leverage home schooling approaches	standards to accommodate alternative home-based learning approaches	

The Ontario government has provided a one-time payment to parents to fund their purchase/use of digital pedagogical tools

Qatar has provided a technical support hotline for parents to implement online learning

Japan is providing childcare support for working parents during school closures and subsidies to companies who provide paid leaves



In Germany, parents who lose income due to COVID-19 can get easier access to child benefits

CORE INITIATIVES DIMENSION: FINANCIAL

	Financial
	Financial support
	Budgeting & Planning
	Investment & Innovation

CORE INITIATIVES 10. FINANCIAL SUPPORT

Financial dimension

Recommendation		Short term	(4-12 weeks)	Mediur	n term (3-6 months)	Long term (6 mo. – 2 years)	
 Financial support Provide financial support to students, parents, teachers employees and schools in n 	rovide financial support to		Coordinate with authorities to provide financial support to families and students in need (food, child care, technology) Establish crisis support mechanisms with other authorities to support low- income students to stay in learning				
nperatives for action Financial impact on low-income families and students due to crisis Employees – teachers, specialists, administration and support staff may need emergency assistance		Provide financia teachers living low-income ar	in remote and	expendit 19 (e.g. s	e extra school ures related to covid- chool deep-cleaning, ng classrooms, etc)	Establish emergency fund for schools, employees, and suppliers that can be drawn on in future cyclical events	
 Contractors and suppliers will loss of income and may need support 	-	Provide financial support to support staff and hourly workers who may not be earning an income during school closures Avail non-education social support mechanism for teachers and employees in need of support		mechanism for and employees in			
Examples					•		
USA distributed \$6BN to colleges and universities to provide direct emergency cash to impacted college students	package to s		Bahrain's school a reduction of s o by 5-10%	•	Japan is providing child support for working pa during school closures subsidies to companies provide paid leaves	arents payment of public teachers and salaries	

CORE INITIATIVES 11. BUDGETING & PLANNING



Financial dimension

Recommendation		Short term (4-12 weeks)		Medium term (3-6 months)		Long term (6 mo. – 2 years)	
 Budgeting & Planning Enable efficient budgetary planning to address the crisis and incorporate new cost drivers in the plan for the future 		Secure licenses and support for distance learning platforms, training, and curriculum adjustments		Establish crisis support mechanisms with other authorities to support education continuity		Estimate costs to account for uneven student progression upon return Plan for revised school	
Imperatives for action		Conduct school deep-cleaning and sanitizing; retrofit nurses offices and school entrances Reallocate specialists and support staff to support online learning and development to avoid furloughs/layoffs		schedules (e.g. summer school, longer terms)			
 Unforeseen and critical need to secure licenses and scale up online technology, training, and monitoring systems 				Integrate lessons learnt into budget planning exercise to ensure efficiency and			
Deep cleaning and other physical measures necessary for reopening	а			, 			preparedness
 Testing and evaluations to be restructured Significant revisions to staffing plan 		Identify all additional costs and categories (e.g. one time, recurring; cost drivers)		Establish budget task force to revise 2020-2021 budget under different scenarios (ongoing lockdown; cyclical lockdown; staggered opening)		Revise hiring/ contracting plans to include public health advisors, distance learning experts, and evaluators	

Examples



USA allows schools to **repurpose K-12 education funds** for technology infrastructure and teacher training on distance learning,

CORE INITIATIVES 12. INVESTMENT & INNOVATION



Financial dimension

Recommendation		Short term (4-12 weeks)	Medium term (3-6 months)	Long term (6 mo. – 2 years)	
 Investment & innovation Enable innovative initiatives and smart investment to ensure future crisis preparedness 		Enable providers to use data and results in exchange for lower fees; establish co- creation and two-way feedback mechanisms	Coordinate with financial authorities to create temporary procurement mechanisms for fast-track and innovative projects	Develop strategy for innovation and investment to meet needs of "new future" and build long-term resilience	
Imperatives for action				Develop guidelines for public-	
 Sunk costs of initial outlays due to school closures/online learning transition 		Green-light pilots and trials of new technology, curricula, and teacher training Create a task force with outside financial and innovation experts to create a pipeline of value-add projects	private partnerships		
 Soaring costs to revise curriculum and standards 			Study education system preparedness , needs, and responses during and post-		
Unknown long-term outlook				COVID period	
Lack of expertise within public education systems/ministries	Fast-track identification of needed resources (esp. technology and curriculum design)		Establish open innovation platform to solicit ideas from teachers/ administrators, students, parents and the private sector	Collaborate across national and international systems to share results and experiences	

Examples

UNESCO launched a **Global Covid-19 Education Coalition** in partnership with multilateral organizations (e.g. ILO, UNHCR, UNICEF), private sector partners (e.g. Microsoft,, Google, Facebook) and NGOs (e.g. Dubai Cares, Khan Academy). The coalition aims to:

- Help countries mobilize resources and implement innovative and appropriate solutions to provide education remotely
- Seek equitable solutions and universal access
- Ensure coordinated responses and avoid overlapping efforts
- Facilitate the return of students to school when they reopen to avoid an upsurge in dropout rates



COVID-19 HAS CREATED NUMEROUS, SIGNIFICANT CHALLENGES TO THE EDUCATION SYSTEM

Policy Challenges	Structural Challenges	Social Challenges	Financial Challenges			
Response coordination, communication and governance	Appropriate infrastructure and systems	Equitable access for vulnerable and disadvantaged students	Financial impact			
• 1.57 BN Learners out of school	33% Countries with little to no access to the internet	75 MM Children already affected by crises face impact of the COVID19	\$3.3 TN Gov. spending and revenue measures as a response to COVID19 ¹			
 Effectively communicate with wide variety of stakeholders – e.g. staff, parents, students Build governance structures to coordinate with stakeholders and partners – e.g. health experts, local authorities 	 Lack of adequate enabling technology/learning platforms and internet access Lack of infrastructure and protocols for sanitization, testing, & separation for school opening 	 Unequal access to devices and internet risks exacerbating unequal learning outcomes Lack of replacement for key services provided through schools (meals, specialist learning support, counseling, etc.) 	 Increased unplanned expenditures for training, licenses Financial support for support staff and employees unable to work remotely Substitution and new hiring for affected staff 			
Academic continuity and quality	Teaching skills and support	Mental wellbeing	Investment and planning			
91% Student population affected by school closures	63 MM Educators impacted by school closures	28% Parents quarantined with children diagnosed with trauma-related mental health disorder	COVID is expected to have a lasting impact on investment policy making			
 Disruption of learning and loss of educational progress Disruption of academic testing, affecting research & admissions Redefinition of learning approaches and quality assurance 	 Need to rapidly upskill teachers and provide resources Lack of technical support resources (provider contracts, training) 	 Increase in anxiety, stress and other mental health problems of students, parents, teachers and non-teaching staff as they cope with disruption and adapt to new interaction models 	 Rapid but smart investment decisions for technology, private- public-partnerships, & innovation to meet immediate need Potential redefinition of education system in "the new normal" 			

Source: UNESCO Covid-19 Global Education Coalition, World Economic Forum, UNCTAD, IMF, Education Cannot Wait

1. Total government spending and revenue measures

EDUCATION LEADERSHIP MUST IMPLEMENT A HOLISTIC STRATEGY TO MITIGATE IMPACT AND ADAPT TO NEW REALITY

Education leadership detailed response framework

\bigcirc	Policy recommendations		Structural recommendations	4	Social recommendations	\$	Financial recommendations
1	Academic continuity Enact emergency measures in the public interest (e.g. school closures) while suppressing the second wave and taking long term measure to ensure resilience	4	Infrastructure availability Build/ensure necessary infrastructure to mobilize distance learning solutions	7	Equitable access Ensure equitable access to content, particularly for vulnerable and disadvantaged groups, to avoid "the lost year"	10	Financial support Provide financial support to students, teachers and parents in need
2	Organization & governance Establish a central steering committee that coordinates education and public health and safety responses	5	Teaching standards and skills Provide teachers with skills and competencies needed for distance teaching	8	Extracurricular support Continue to provide extracurricular support to students (e.g. meals, mental health)	11	Budgeting & planning Enable efficient budgetary planning to address the crisis and plan for the future
3	Policy transparency & stakeholder communications Create a communications strategy/plan to support execution of education response	6	Syllabus & assessment flexibility Adjust syllabus to prioritize learning goals during distance learning, modify calendar and promotion mechanism, provide remote assessment tools	9	Family support Offer pedagogical, psychological and/or social support to parents	12	Investment & innovation Enable innovative initiatives and smart investment to ensure future crisis preparedness

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Oliver Wyman and our parent company Marsh & McLennan (MMC) have been monitoring the latest events and are putting forth our perspectives to support you clients and the industries you serve around the world. The Coronavirus Hub will be updated daily as the situation evolves.



Visit our dedicated COVID-19 website



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