

HAILEYBURYX

Online learning for ELC-12 students anywhere in the world, founded on the Haileybury traditions of academic excellence, a global outlook, an entrepreneurial spirit and our commitment to social justice.

haileybury.org.au

This document, originally created in October 2019, has now been updated to take into account the COVID-19 pandemic. We will discuss the impacts of COVID-19 later in the document.

BACKGROUND

Haileybury is a 127-year old ELC-12 elite independent school with 6,000 students, 1000 teaching and support staff and campuses in Melbourne, Darwin and Beijing. We are leaders in digital learning and have implemented the Canvas LMS across the ELC-12 curriculum, one of the first schools in Australia to do so. All of our courses have online learning materials integrated into classroom teaching or as part of blended learning. Our teachers have professional development opportunities in digital, blended and remote teaching and support from a network of digital learning leaders.

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HaileyburyX is an online learning platform available to ELC-12 students anywhere in the world.

The motivations behind HaileyburyX are to

- provide outstanding learning experiences to students;
- bring our demonstrated excellence in teaching to a global audience, allowing us to engage with more learners in, and beyond, our core demographic and markets;
- understand the challenges of shifting from classroom, through blended, to online learning
- to reduce delivery friction for some of our courses by moving them online;
- further reinforce the Haileybury brand in Australia and China, and create awareness in the rest of the world;
- establish a position as market and thought leader in ELC-12 edtech; and
- create revenue opportunities.

While almost all schools are somewhere on the technology adoption curve, we believe that HaileyburyX is the only ELC-12 edtech organically grown from an elite independent school.¹ We have the advantages of an outstanding reputation for academic excellence; a large student population with engaged, aspirational parents and students; an active and influential

¹ However Eton College, UK, has established EtonX (<https://etonx.com>) which provides online, tutor-supported communications skills courses and is now more aggressively moving to online delivery; and Avenues Online (<https://www.avenues.org/aon/>) has also announced its intention to move into this space. Others will follow to cope with the aftershocks of the pandemic.

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alumni community; and international presences, including a campus in Beijing, and relationships with schools throughout China, in Timor Leste, The Philippines, Japan, France, the UK and the US.

MARKET CONTEXT

The ELC-12 edtech market is vibrant and rapidly growing. It is following the curve of the tertiary edtech market where MOOCs have become established digital learning platforms (EdX, MOOC, US).

There are countless startups and scaleups around, for example, specific knowledge or skills (*Onion Math*, algebra, China, series D, CN¥300M, April 2019) or learning support (*Geniebook*, on-line tutoring and support, Singapore, pre-series A \$1.5M).

Australian players include *Edrolo* (VCE support, 3 rounds, \$4m, 2015) which is sold to schools to support students and teachers for the VCE, and where content is provided by current or recent teachers; and *Cluey* (tutoring, series A \$20M, May 2019) which provides private tutor support using learning analytics to personalise the student experience.

The Australian ELC-12 learner base is around 4M students; China and India have together almost 3Bn learners. The global edtech market (ELC-12, tertiary, vocational and corporate) could be as large as \$8Tn by 2025 (HolonIQ).

CHALLENGES

Entering into the ELC-12 edtech market for Haileybury poses several challenges: (i) availability and ability of teachers to create courses; (ii) technical expertise; (iii) market and commercial knowledge; (iv) access to funding.

We will solve these challenges by: (i) a course design methodology based on Agile principles and practices that simplifies design, focuses expertise in teams and results in more learner-centric course design; (ii) using a variety of platforms including cloud-based LMS Canvas and CMS WordPress as our delivery platforms; (iii) we have appointed Peter Thomas to lead the project who has a tech, commercial and education background and we are appointing a global advisory board of tech leaders to advise on strategy; and (iv) we are not under immediate funding pressure and can nurture the conversion of free to paid users to build a sustainable venture, working with our advisory board for future potential external funding rounds.

ROADMAP

We have been raising awareness of HaileyburyX amongst the teacher community and engaging with teachers to form Agile groups who will develop the first co-curricular courses. Several of these are now live for Haileybury student audiences with many in planning or development. In August 2019 the first *Agile Learning Design* microcredential for Haileybury teachers.

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Our private roadmap (we also have a [public roadmap of courses](#)) is a process of moving along a series of continua as follows:

FROM		TO
CO-CURRICULAR Co-curriculum courses ('XPlus') will help us refine methodology, explore tech platform, get early teacher and learner feedback	From co-curricular courses, adding core curriculum courses	CORE CURRICULUM Core curriculum courses ('XCore') are high-value, high impact curriculum courses
COURSES Chinese language, Latin, financial literacy, maths fundamentals, global challenge courses, explicit model courses	From individual courses to discipline clusters, mastery-based learning and stackable credentials	DISCIPLINE CLUSTERS Humanities, science, commerce and within-discipline subject clusters
MICROLEARNING Short courses	Starting with micro-learning, adding more complex extended courses	EXTENDED LEARNING Extended, stackable courses
SELF-CREDENTIALLED Haileybury-badged courses	From Haileybury-credentialled to co- or external credentialing	CO-CREDENTIALLED Digital Promise, US; RMIT Online; Melbourne Uni
DIRECT TO STUDENT With pro bono courses for disadvantaged students as part of our commitment to social justice	Build a base of student purchases and subscriptions, add institutional subscriptions	DIRECT TO INSTITUTION With pro bono access offered to partners
FREE Conversion of free to paid users accelerated by offering paid credentialing	Build from (i) free courses adding (ii) paid credentials to (iii) paid courses with free credentials	PAID Retention of paid users can be achieved by free credentialing
HAILEYBURY TEACHERS Teachers working in agile groups avoids the experience of being merely a provider of content	Initially content from Haileybury teachers, moving to external authors with Haileybury teachers as guides and validators	ANY TEACHERS Can be used as a global teacher recruitment pipeline
VIDEO	Starting with video-led content, incorporating emerging media (audio, AR, VR) and AI/learning analytics/LXP	OMNIMEDIA
SELF-FUNDED	Initially self-funded but seeking investment from external partners in tech, VCs, government	EXTERNAL INVESTMENT
ELC-12	Move from ELC-ELC-12 courses to add educator and parent development content	PROFESSIONAL COURSES Courses to improve teacher skills, partnering with global tertiary courses
AUSTRALIA	Initially serving a local market, followed by APAC and global through 'XGlobal' course catalogue built from 'XPlus' and 'XCore' courses	GLOBAL

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THE IMPACT OF COVID-19

The COVID pandemic has, and is still having, enormous and unprecedented impacts on Haileybury and on education as it is on other industries. We have no certainty as to the future but for the moment our reading is this.

Haileybury, like all schools in Australia, and paralleling others round the world, has rapidly moved to remote teaching. Although we are a leading school in digital skills and infrastructure, we have had to move very quickly to provide continuity of learning for our students. This has taken the form of remote classrooms on Zoom supported by our existing asynchronous Canvas LMS courses. Many of our resources have been channelled towards serving our students. The situation in Australia is unlikely to change for some time and the economic context in Australia will mean that there may be a drop off in core revenue. The need for continuity for our students, and the revenue challenges, will further drive our digitalization agenda and present opportunities as well as challenges.

Rich content

We are now generating an enormous amount of new content in the form of learning materials and classroom video. For example, we are partnering with the Australian ABC Learning organisation to contribute our Junior School teaching practice to broadcast TV education. It is likely that we will have many more materials that can form the basis for HaileyburyX courses.

Acceptance of online

Our teachers have also come to see very quickly that modes of delivery beyond classroom or blended are now not just necessary but can be superior. This realisation means that we will be better placed to drive forward partnerships with teachers to create HaileyburyX content, as that content can be folded back into the core curriculum for everyone's benefit. The challenges we have had in helping teachers understand the importance of HaileyburyX are likely to be less (but not absent).

Revenue

The uncertain economic situation also means that our relaxed test-and-learn roadmap to move to paid users has changed. Opening up new revenue streams was always desirable and is now more of a priority.

Revenue opportunities will come initially from a growing number of learners who will seek additional content that supports what their school provides. That learning will need to be curriculum supporting and enhancing, be much more up to date than the core curriculum and be delivered in novel and flexible pathways that can be personalised and credentialled. This is to our advantage.

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It is also likely, we anticipate, that there will be opportunities to provide parent materials as parents assume a greater presence and role in their children's education. We already have courses in progress that have multiple audiences including parents.

We think it is unlikely that we will derive significant revenue from providing teaching material as that market is saturated with free or low-cost downloadables. We do see opportunities for high-stakes high-value professional development, such as our *Haileybury Explicit Instruction Programme* and *Agile Learning Design* programmes, plus international consultancy in whole-school digital transformation such as our *HaileyburyGO* programme which is initially a community contribution to support schools as they transform but will evolve into a for-fee offer.

New worksystems

Our play in HaileyburyX has always been that to create effective courses that serve the needs of learners, rapidly and at scale we need new worksystems. We created an internal programme, the *HaileyburyX Microcredential in Agile Learning Design* which enrolled 50 teachers and graduated 15. This was an MVP for us, and we have pivoted to two much shorter offers for teachers in Australia: The *Agile Learning Design 30-day Sprint* and *Agile Accelerator*, a six-day programme. Both launch Q2 2020.

We are convinced that these new worksystems will become more important as our teachers and many other teachers recognise the need for agility and increased collaboration for which they are unprepared and under-skilled. This is unlikely to change as we emerge from the pandemic. We have taken a leadership position in this area early which will drive awareness of what we do, provide revenue and also allow us to flex and pivot our course offerings quickly.

CURRENT STATUS

HaileyburyX is stationary on the board. The bulk of the groundwork had been done before January 2020.

Rightly, our attention has been focused on supporting our student community as priority. But as we emerge into the new normal, we anticipate a raft of opportunities opening up even though the edtech market globally will heat up dramatically. Many of these entrants will fail because learners will become more demanding of high quality, curriculum-aware content and so demand hallmarks of quality that we are positioned to offer. This has always underpinned the HaileyburyX offer: an edtech grown organically from an elite independent school with an evidence base of achievement, a deep knowledge of modern pedagogy and a public position as digital innovators.

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