

# CHOOSE TO LEARN

2024

**PART 1: K-12 PARENTS  
POISED TO EXPLORE NEW  
EDUCATIONAL OPTIONS**



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# PART 1: K-12 PARENTS POISED TO EXPLORE NEW EDUCATIONAL OPTIONS

## CURRENT STATE: PARENTS ARE AGENTS IN THEIR CHILD'S EDUCATION

School choice has long been an important – if not systemically fraught – mechanism allowing families to seek out the best educational model for their children. Historically, the phrase “school choice” signaled that a family was leaving the public school system to pursue either private school or homeschooling options. In a rapidly evolving educational ecosystem, however, the concept of “school choice” is also shifting. The provider ecosystem no longer simply consists of three options – public, private or homeschool. Instead, it has become more kaleidoscopic, with a greater number of options available to parents and students to personalize in- and out-of-school education plans.

As we reflect on our research in this area and look to the future, we remain compelled by the momentum we see from parents looking to find the best educational options for their child in an environment where learning gaps and mental health challenges persist in concerning ways.

## BACKGROUND: BUILDING ON CHOOSE TO LEARN 2022

In 2022, with support from Walton Family Foundation and Stand Together Trust, our *School Disrupted* series revealed a significant post-pandemic decline in K-12 public school enrollment – a 9% decrease from 2021 to 2022 – which reflected a tipping point, rather than an anomaly. Similarly, more recent research indicates homeschooling – in various forms – has become the fastest growing K-12 education delivery segment, with enrollment increasing 51% over the last five years.<sup>1</sup> In response, we set out to understand what is motivating parents to make significant changes to their child's schooling experience, to map the landscape of K-12 educational offerings beyond public schools, and to envision and illustrate what a healthy K-12 ecosystem could look like. This effort culminated in *Choose to Learn 2022*, an investigation into parents' desire for more student-centric learning experiences reflective of their child's interests and needs.

The pandemic was eye-opening for many parents who were exposed to both the benefits and shortcomings of their child's education experience; nearly 60% of parents reported that COVID-19 had changed their educational preferences and expectations for their child. Parents expressed an interest in options beyond the status quo, with nearly 80% indicating that their child's learning could and should happen anywhere.<sup>2</sup> One of our most compelling findings was the active level of parent interest in alternatives to their child's current school model, most often a public school. This segment of parents interested in new or different learning pathways – which we termed “Open-minded parents”<sup>3</sup> – accounts for the largest percentage (48%) of K-12 parents.

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1. [www.washingtonpost.com/education/interactive/2023/homeschooling-growth-data-by-district](https://www.washingtonpost.com/education/interactive/2023/homeschooling-growth-data-by-district)

2. This was juxtaposed with just 7% of parents who believe learning should happen primarily “in school”

3. We use this term – “Open-minded parents” – throughout the *Choose to Learn 2024* series to refer to individuals possessing the attributes of this segment/ persona

The size and potential impact of the Open-minded parent segment on our nation's K-12 public school system served as a focal point for our 2024 Choose to Learn efforts. In sheer numbers, the Open-minded segment translates to a potential 24 million K-12 students who are likely to adopt new in- and/ or out-of-school programs in the near-term. We took a deeper look at what is catalyzing these parents to act, the barriers they face, and the pathways and resources emerging to meet their needs. We screened for Open-minded parents based on two factors – their interest in adopting a new approach to their child's education and their concern about navigating discrete barriers to act on their aspirations. The result was a nationwide survey<sup>4</sup> of more than 2,000 Open-minded parents, supported by six focus groups; our key insights and implications for the field are shared across a three-part series.

In *Choose to Learn 2024: Part 1 - K-12 Parents Poised to Explore New Educational Options*, we clarify the types of “educational pathways” Open-minded parents are interested in pursuing for their child and the relative distribution across each pathway. Drawing from our research, we highlight parent motivations for making a change and the issues for which they are optimizing.

Part 2 highlights Open-minded parents' journey to activation with an emphasis on specific barriers they face in moving from interest to adoption. We highlight a set of actions and opportunities that can aid these parents in pursuing more student-centric options for their child.

Part 3 introduces the concept of “Navigators”, a diverse set of organizations aiding parents in better understanding and evaluating alternative education options for their child. We detail eight design principles that best-in-class Navigators possess to ensure their efforts best aligns with parents' needs and highlight opportunities to maximize scale and impact.

The K-12 ecosystem is facing a significant inflection point. Increased parent agency post-pandemic, expanding and accelerating school choice policies, and proliferation of technology-enabled learning models and solutions are resulting in greater – and more urgent – opportunities to serve all types of students through more personalized learning experiences. By focusing on these issues and opportunities, we intend for this year's *Choose to Learn* series to spur providers, philanthropists, and policymakers alike to act on the interest and momentum reflected in parents' aspirations.

## KEY FINDINGS

- **Nearly half (48%) of all K-12 parents fall into the Open-minded segment and possess a strong interest in pursuing new and/or additional educational programs for their child.** These parents are primed to act, but face specific barriers that currently prevent them from being “activated.”
- **Three distinct parent personas exist in the Open-minded segment – School Supplementers, School Switchers, and Customizers.** The majority of parents are School Supplementers (64% of Open-minded segment, 31% of all U.S. K-12 parents), who seek to augment their child's current school experience with additional programs. Switchers are the smallest segment (10% of segment, 5% of all K-12 parents), while Customizers – who are willing to invest in a bespoke program for their child – represent a sizable segment (26% of Open-minded, 12% of all K-12 parents).

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4. See Appendix for survey methodology

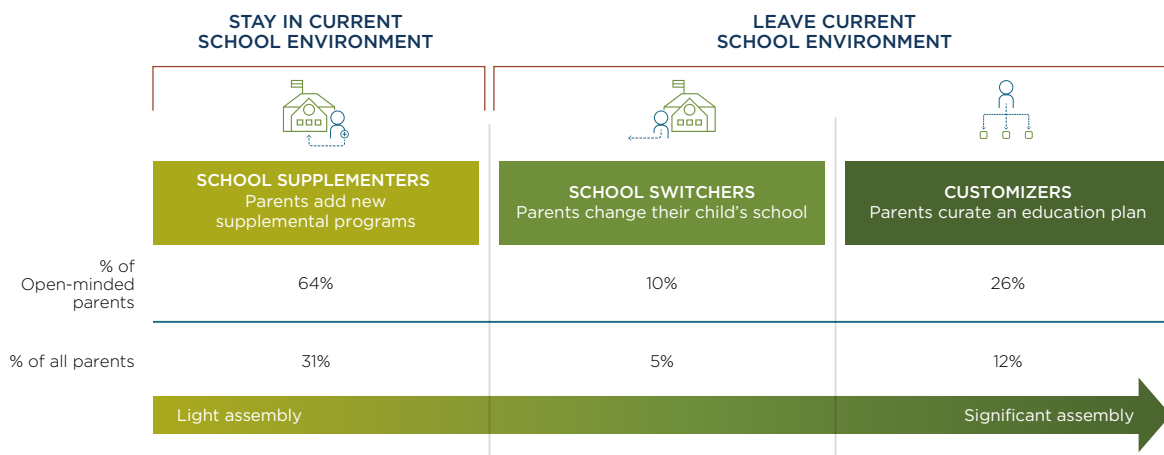
- **Parents are most likely to be spurred to action by mental health issues or academic challenges faced by their child.** Nearly half (46%) of parents in the Open-minded segment indicate mental health concerns are a primary factor leading them to consider an alternative pathway for their children. Similarly, 44% cite academic concerns as impetus to make a change.
- **“Personalization” is a key goal and decision-making factor among parents looking to switch schools or fully customize their child’s education.** Parents indicate seeking a better level of individual attention for their child and exposure to learning experiences that interest them as among the top reasons driving them to pursue alternative educational pathways.
- **The perceived importance of “school culture” – and the various formal and informal experiences existing in a traditional school environment – is a powerful pull for parents, and a barrier to them pursuing fully customized offerings for their child.** Among School Supplementers and Switchers, the perceived benefits of a school culture are cited as the primary reason for staying in a traditional public or private school setting and not exploring a more customized option.

## OPEN-MINDED PARENTS SEEK MORE CUSTOMIZED ALTERNATIVES

In the wake of the COVID-19 pandemic, many children continue to contend with both academic gaps and significant mental health challenges. Open-minded parents have a strong desire to augment their child’s current school experience or pursue alternative educational pathways to better meet their needs. In *Choose to Learn: Part 1 - K-12 Parents Poised to Explore New Educational Options*, we set out to understand what types of pathways parents in the Open-minded segment are seeking for their children. These insights highlight the potential enrollment risks facing U.S. public schools and prospective demand for non-traditional or emergent school models (e.g., microschools, virtual schools) in a post-pandemic environment. Feedback from more than 2,000 surveyed Open-minded parents revealed three distinct parent personas (See Figure 1).

Figure 1:

### Open-minded parent priority pathways



Source: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis

## SCHOOL SUPPLEMENTERS



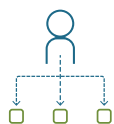
(64% of Open-minded segment, 31% of all U.S. K-12 parents) plan to continue with their child's current educational institution<sup>5</sup> and simultaneously add supplementary activities and experiences. These additional activities may include tutoring and enrichment programs, internships, and service learning, among others.<sup>6</sup> School Supplementers aim to strike a balance between the conventional school environment and the enrichment provided by tailored extracurricular activities.

## SCHOOL SWITCHERS



(10% of segment, 5% of all K-12 parents) aim to transition their child to a new school setting, such as a private school or a microschool. In addition to changing their child's primary educational setting, they may also introduce supplemental programs to create a more comprehensive and personalized educational experience.

## CUSTOMIZERS



(26% of segment, 12% of all K-12 parents) seek to opt out of their child's current school setting to create a bespoke educational experience, characterized by student-centric<sup>7</sup> learning opportunities that can happen anytime, anywhere. These parents express an interest in stitching together - or "assembling" - a collection of programs and experiences to create a unique and adaptable learning experience for their child. In most cases, the outcome of these efforts would look nothing like a traditional, classroom-based learning environment.

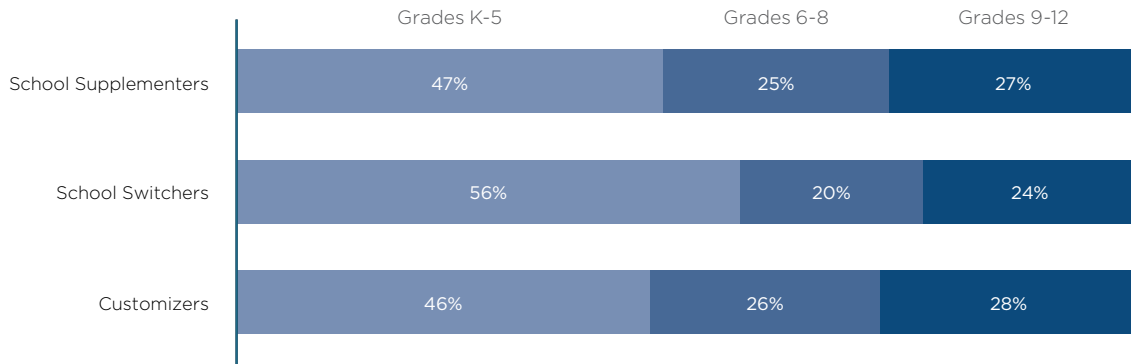
Perhaps most surprising is the number of parents expressing their desire to be "Customizers"- more than 1 in 10 U.S. K-12 parents and a group more than two times the size of those looking to switch their child to a different school. The Customizers represent an estimated five million K-12 public school students and 50,000 private school students who are open to leaving.<sup>8</sup>

Importantly, broad interest exists among parents across these three pathways regardless of demographic factors. Parents at varying income levels and with different educational backgrounds<sup>9</sup> show equal interest in each pathway. While there are some small differences by race - Black parents are slightly more likely to be School Switchers or Customizers than their White, Asian, and Hispanic peers - our data indicates that student-centric learning opportunities are appealing to all types of parents, not just certain segments.

5. School Supplementers can have their child currently enrolled in any type of school. The majority have their child enrolled in public school (77%) or charter schools (7%)
6. Among School Supplementers, 61% are interested in college/career preparation programs and 56% are interested in extracurricular/personal enrichment programs. The interest in college/career programs predictably skews towards parents of high schoolers (68%), while elementary and middle school parents are more focused on personal enrichment (60%)
7. "Student-centric" learning is programming or schooling that caters to individual students' interests and needs, as opposed to being a one-size-fits-all model
8. Based on an estimated enrollment of 49.4 million public school students and 4.9M private school students in the U.S. 80% of Customizers have their child enrolled in public school and 8% have them enrolled in private schools.
9. Educational background refers to the highest level of education attained by a parent whether that be a high school diploma, Bachelor's degree, or Master's/PhD

Notable differences in terms of pathway interest do emerge by grade level. Parents of elementary-aged children are more likely to be School Switchers, whereas parents of high school students are slightly more likely to be Customizers (See Figure 2). The structure provided by a traditional school environment and the perceived value of school culture and socialization for younger children likely contributes to this dynamic. Conversely, the relative maturity of high school students and a desire for greater independence and/ or autonomy lends itself to a customized model with a higher degree of self-directed learning.

*Figure 2:*  
Grade-level differences among parent priority pathways



*Note: No demographic differences across pathway interest among students with special needs, religious affiliation, geographic location, race, income, employment status, or educational attainment*

*Sources: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis*

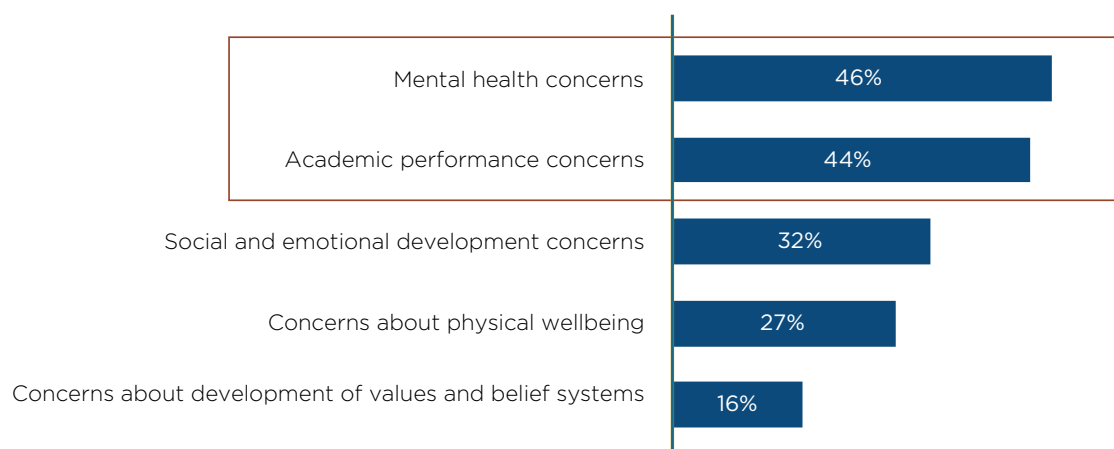
While high **interest** levels exist across all demographics for the three educational pathways, barriers to **access** persist, not surprisingly, based on families' financial circumstances. Nearly twice as many parents with household incomes under \$50,000 (46%) cite affordability as a barrier to accessing one of the three pathway options compared to parents with household incomes greater than \$150,000 (26%). In *Choose to Learn Parts 2 and 3*, we will further interrogate the access barriers and emerging strategies and models striving to ensure more equitable access to alternative opportunities for parents and their children.

## MENTAL HEALTH AND ACADEMIC CONCERNS ARE PRIMARY DRIVERS PUSHING PARENTS OUT OF SCHOOLS

While receptive to alternative educational pathways, Open-minded parents typically will not act until a catalytic event *pushes* them to explore new options. Two critical factors emerge that propel parents from intent to action: their child's mental health and their academic performance.

Figure 3:

### Top concerns that would cause parents to take action\*



Notes: \*Survey question: "Which of the following would cause you to take action to improve your youngest child's education? Select up to two."; n=1,331 (School Supplementers), n=211 (School Switchers), n=544 (Customizers)

Sources: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis

In the wake of the pandemic, nearly half (46%) of Open-minded parents indicate mental health concerns are a primary factor leading them to explore an alternative school environment for their child. Parents highlight that their child's mental health is a fundamental condition that must be addressed to support and enable their learning.

■ *"If my child is not happy, they will not be focused on learning."*  
- Elementary school parent, Ohio

■ *"If my child is not in a state of good mental health, how can normal learning occur?"*  
- Middle school parent, Arizona

■ *"Everything is secondary to mental health."*  
- Middle school parent, California



Furthermore, parents perceive that schools are poorly situated and/ or can't be relied on to address their child's mental health needs. This dynamic is exacerbated by an acute fear that failure to identify and address mental health needs could be threatening to a child's safety.

*"I just don't trust a school to take proper care of my child's mental health needs."*

*- Elementary school parent, California*

*"Mental health takes a huge toll on children and if my child's school doesn't address it, then we need to attend a school that will."*

*- Middle school parent, Arizona*

*"Mental health is just as important as physical health. There are too many teen suicides. If my child is not mentally happy in a school, it is my responsibility to change that."*

*- Middle school parent, Michigan*

Parents' emphasis on ensuring their child's mental health needs are met is a consistent consideration across all key demographics (i.e., geography, race, income level). However, parents' mental health concerns do vary somewhat by grade level, suggesting stages at which parents may be more likely to act. Parents of middle school students (i.e., grades 6-8) have the greatest concern about their child's mental health (54%) relative to parents of high school (48%) and elementary school (44%) students. These findings reinforce the already challenging transition for middle school students and their parents, underscoring the struggles many adolescents encounter during this stage of development.

Not surprisingly, academic performance concerns also factor strongly in creating an impetus for change, with 44% of Open-minded parents citing it as a driving factor. Parents indicate that academic concerns boil down to students either not being challenged enough - *"I worry my child will get bored and stop engaging"* - or falling behind without proper intervention - *"They don't care if your kid is struggling as long as they meet the bare minimum to pass."*

These findings suggest that the public school system's inability to address these twin issues could have a dramatic impact on student enrollment patterns in the coming years. With teacher and counselor attrition challenges persisting in a post-pandemic environment - and likely exacerbated by the expiration of ESSER funding which buoyed staffing levels in key areas - schools will need to find impactful, sustainable strategies for supporting the mental health and academic intervention needs of an increasing number of at-risk students. Failing to do so will undoubtedly "push" more parents into alternative and emergent models, swelling the ranks of active School Switchers and Customizers.

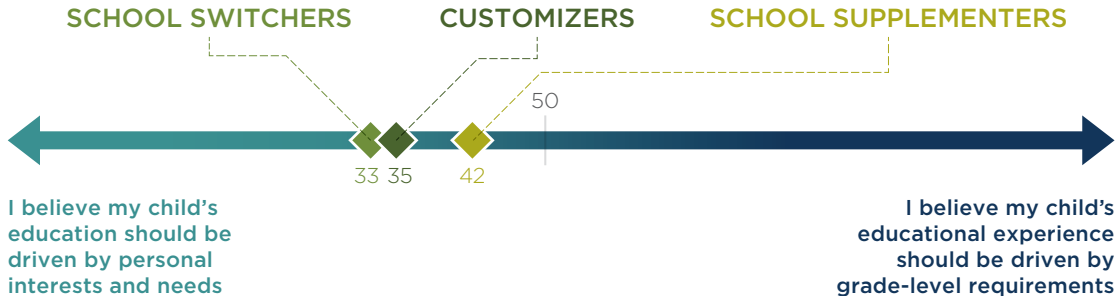
# PARENTS VALUE AN EDUCATION THAT REFLECTS CHILD'S INTERESTS AND NEEDS

The K-12 school landscape is no longer constrained by limited options, where a parent's decision to disenroll their child from the public school system means a binary choice between a fee-based private school or parent-led homeschooling. The range of options has accelerated as a result of the pandemic and expansion of school choice models (see *Paying for Choice: The ESA [R]evolution*, forthcoming); Open-minded parents are at the forefront of exploring this changed landscape and driving increased demand for adaptable learning experiences. They seek alternative models that address their child's academic and health and wellness needs, encourage their interests, and expose them to pedagogical approaches that personalize learning.

All segments of Open-minded parents are biased towards educational options that are driven by their child's personal interests as opposed to a more conventional experiences driven by grade-level requirements. School Switchers and Customizers, in particular, are open to pursuing more innovative pathways.

Figure 4:

## Open-minded parent priority pathways

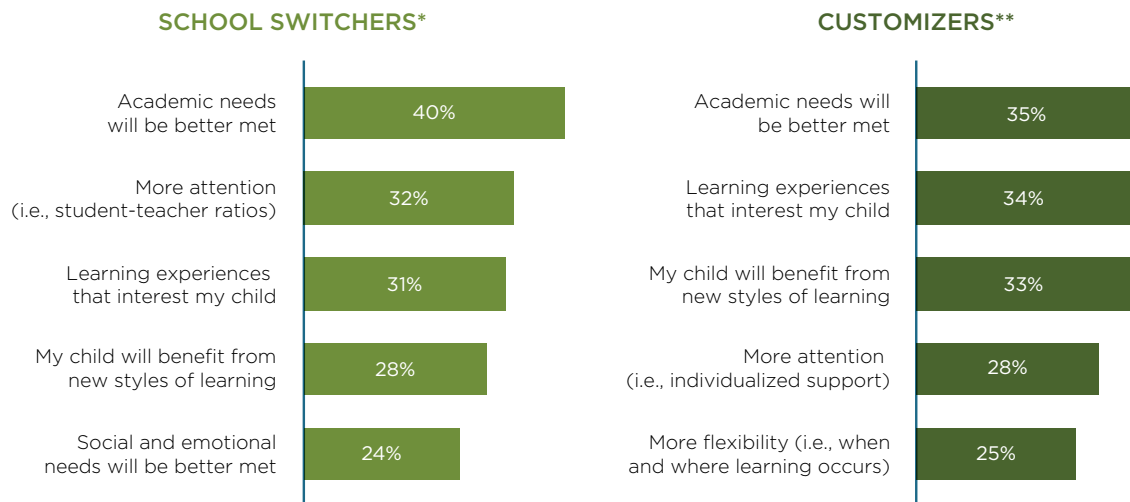


Source: Tyton Partners analysis

For both parent personas, the desire for improved quality of academic instruction and for personalization go hand-in-hand. School Switchers cite improvement in meeting their child's academic needs (40%) and a higher level of attention on their child (32%) as the top two reasons catalyzing their interest in an alternative school setting. Customizers similarly want to address their child's academic needs (35%) and select learning experiences that better match their child's interest (34%).

Figure 5:

## Top reasons for interest in pathway



Notes: \*Survey question: "Why are you interested in new alternative schools? Select up to three." n=211; \*\*Survey question: "Why are you interested in opportunities provided by designing a customized education plan? Select up to three." n=544  
Sources: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis

Open-minded parents describe personalization of their child's learning environment as a way to spark their child's passions.

*"We want the school to focus on the classes and subjects our child loves - that's what she should be learning."*

- High school parent, Texas

*"We want tailored academic experiences based on what our child excels in, and where they need extra support."*

- Middle school parent, Texas

*"Not every kid is going to love the same type of school. I want my kid to have exposure to options and then find what he is passionate about and can excel in throughout his life."*

- High school parent, Tennessee

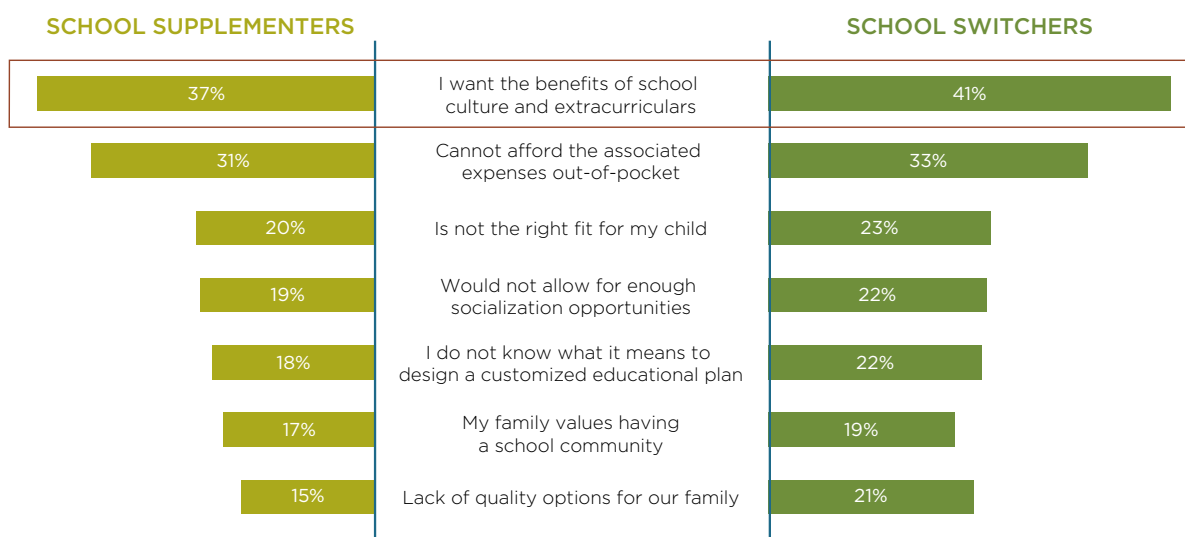
Personalization is not an end in and of itself. Rather, it enables a process of discovery, an alignment of interest and need, and a means to help children develop a lifelong love of learning. For many public schools, facing large and growing teacher-to-student classroom ratios, this aspiration for personalization becomes increasingly untenable. A longstanding driver of private schools' appeal - and more recently microschoools - is the scale of the classroom environment and the benefits to individual learner needs.

## PERCEPTIONS OF SCHOOL CULTURE REMAIN A BARRIER TO CHANGE

While Open-minded parents champion personalization and flexibility, many face a dilemma when considering whether to fully depart a conventional school model. Amidst the expanding ecosystem of school choice models, the enduring attraction of a traditional school environment, its community and culture, remains a strong reason for staying put. A significant percentage of School Supplementers (37%) and School Switchers (41%) cite the benefits of school culture as a reason not to embrace a fully customized education pathway for their child.

Figure 6:

### Top reasons for NOT pursuing a customized education plan\*



Notes: \*Survey question: "Why are you less interested in designing a customized educational plan for your child compared to other options? Select up to three."; n=1,331 (School Supplementers), n=211 (School Switchers); answer choices with <15% excluded from chart

Sources: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis

Parents also grapple with the sense that a traditional school environment better helps prepare their children for the broader world, including college and future careers. Emblematic of this dynamic is the observation of a North Carolina parent of a high schooler who shared: "Homeschooling was an option for our son, but he wants exposure to things like technology, multiple teachers, and peer relationships, things that will help prepare him for college." Some parents, such as one middle school parent in Tennessee, perceive more benefits of social-emotional learning for their child in a traditional school environment: "Our son is intelligent but struggles with social skills. We're keeping him in the school to help him navigate a social environment."

Importantly, these parent comments reflect a current perception that more customized educational experiences are not able to provide foundational experiences and cultural benefits typically associated with a conventional school environment. However, Customizers – i.e., parents who have ventured into more bespoke education models for their child – are keen to dispel this notion. They emphasize the feasibility of creating a vibrant social environment that complements their child's learning environment; the key component is ensuring parents have the right supports.

For years, homeschool families have established local networks and community activities to support socialization among students. With the proliferation of newer schooling models, a similar need emerges especially as the universe of parents considering alternatives expands. As a Georgia parent of a middle schooler noted, “[Open-minded parents] need mentors to talk to and make them feel not alone, to reassure them they’ll still have social opportunities for their kids. That there is still a structure to follow.”

However, parents’ fear of the new or unknown remains a powerful force among those contemplating new educational options for their child. The observation of a Virginia parent of an elementary school student is representative of this dynamic: “For most people I talk to, the biggest issue [in pursuing a customized education program] is fear. No curriculum or off-the-shelf solution addresses this fact. Nobody confronts the fear parents face when making a decision that is, in many ways, counter-cultural.” Today, for many Open-minded parents, this tension results in stagnation. They seek to balance the allure of a “known” school environment and experience with the strong desire to provide their children with a more personalized, adaptable educational journey. For them to feel confident pursuing new, non-traditional models, they likely need to see and experience these models first-hand and the potential – and credibility – they offer.

## **OPEN-MINDED PARENTS NEED SUPPORT TO MOVE TOWARDS ACTIVATION**

The 48% of K-12 parents considering new educational options have a myriad of personal attributes, needs, and educational goals for their children; however, they are united in their desire for something different than the status quo. With such a substantial percentage of parents interested in custom education options, it is incumbent on providers to understand the complexities of how parents make decisions and why they have not yet been able to pursue new choices for their child. In the next part of this series, we will investigate the journey that parents go on to explore and make decisions surrounding new educational options, and most critically, the barriers that prevent them from acting. This insight will enable stakeholders to identify the critical inflection points where parents need specific interventions to act on their interests.

# APPENDIX

## THANKS & ACKNOWLEDGEMENT

This publication and its findings were made possible by generous support from the Walton Family Foundation and Stand Together Trust. The findings and recommendations contained within are those of Tyton Partners, and do not necessarily reflect positions or policies of the Walton Family Foundation nor Stand Together Trust. We are particularly grateful for the leadership and support from the Foundation’s K-12 program officer, Jamie Jutila, and Stand Together Trust’s Senior Director, Adam Peshek.

We want to express appreciation for the more than 2,100 parents who responded to our surveys and engaged with us in focus groups. Our work was informed and guided by the parents, education advocacy leaders, and navigation experts that we interviewed during this process.

## RESEARCH OVERVIEW

Tyton Partners captured input from a variety of sources throughout this engagement, including parents of K-12 students and field experts.

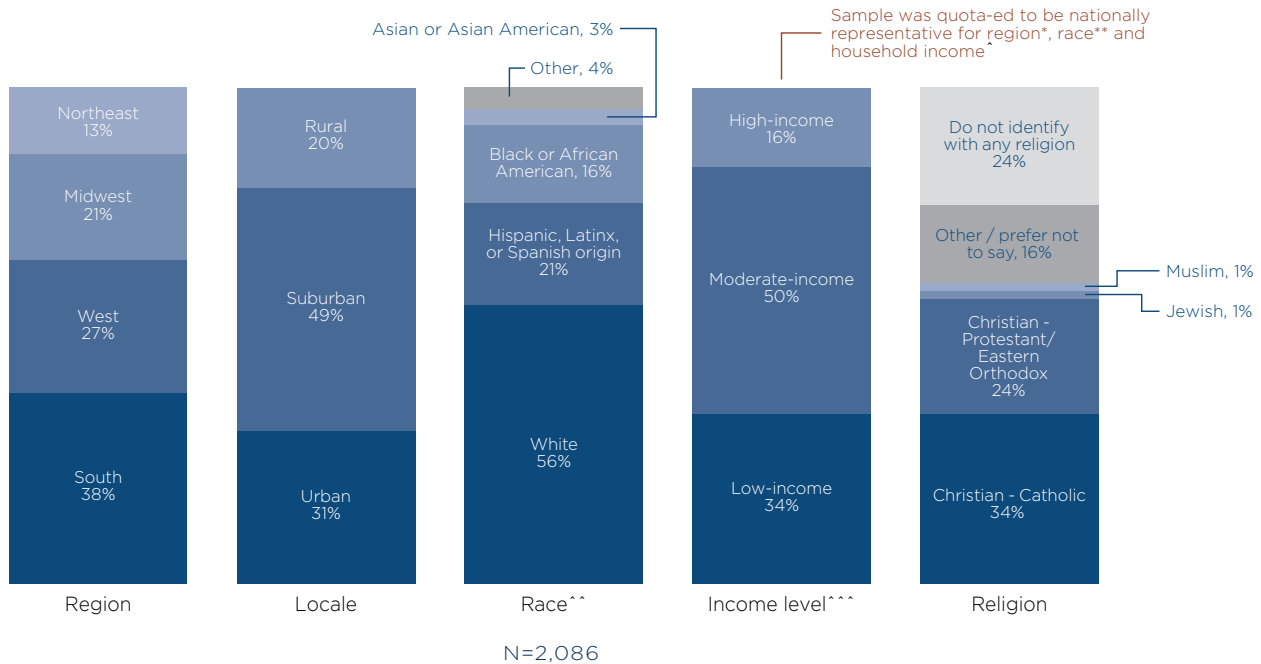
- **Parent survey** › Fielded a large-scale survey generating feedback from more than 2,000 U.S. “Open-minded” parents with a desire to make a change to their child’s learning experience
- **Parent focus groups** › Conducted focus groups with Open-minded parents and Activated parents, speaking with more than 20 parents geographically spread across the U.S., to better understand parent aspirations and hesitations around changing their child’s learning experience
- **External interviews** › Spoke with leaders across the K-12 ecosystem, including program operators and researchers to shape understanding of the stages of K-12 parent journeys and develop perspective on key barriers and enablers

## SURVEY METHODOLOGY

Tyton Partners conducted extensive research to collect data on Open-minded parents’ attitudes and beliefs regarding their child’s education. Our primary research, conducted in August 2023, includes a survey of more than 2,000 K-12 parents across the United States. Parents were screened into the survey as “Open-minded” based on the two dimensions: their expressed desire to transform their child’s educational experience, coupled with a perceived inability to currently act on that interest.

Parents are core influencers and decision-makers in their child’s educational experience. To best understand how and why families make educational choices, Tyton gathered input from a diverse sample of K-12 parents. Parents focused on one child throughout the survey, and we set targets to ensure appropriate levels of representation relative to the demographics. All analyses were examined through the lens of key demographic indicators, and any significant findings are included in the report.

## K-12 Open-minded Parents survey demographics



Notes: \*US breakdown of region: Northeast=17%, Midwest=20%, West=24%, South=38%; \*\*US breakdown of race: White=76%, Hispanic or Latinx=19%, Black or African American=14%, Asian or Asian American=6%; ^US breakdown of household income: Low income=35%, Moderate income=45%, High income=20%; ^^Percentages are shown as a measure of the total number of responses, as parents could select more than one answer; ^^^Low income = <\$50,000, Moderate income = \$50,000-\$150,000, High income = >\$150,000

Sources: Choose to Learn Parent Survey 2023, Tyton Partners interviews and analysis

## DICTIONARY

Our research refers to several concepts related to K-12 education, including:

- **Educational offerings:** learning experiences that students and families can choose to participate in to replace or extend the traditional school experience
- **Learning experiences:** instructor-led academic or non-academic programs that occur in a variety of settings or environments
- **In-school:** a core program that a student participates in with majority of learning time and/or grants the student a majority of credit
- **Out-of-school:** a program that a learner participates in to complement the school experience, typically occurring when school is not in session

# ABOUT

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Tyton Partners is the leading provider of investment banking and strategy consulting services to the global knowledge and information services sector. With offices in New York City and Boston, the firm has an experienced team of bankers and consultants who deliver a unique spectrum of services from mergers and acquisitions and capital markets access to strategy development that helps companies, organizations, and investors navigate the complexities of the education, media, and information markets. Tyton Partners leverages a deep foundation of transactional and advisory experience and an unparalleled level of global relationships to make its clients' aspirations a reality and to catalyze innovation in the sector. Learn more at [tytonpartners.com](https://tytonpartners.com).

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## WALTON FAMILY FOUNDATION

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