

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.¹ 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.² 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”³ – accounts for the largest percentage (48%) of K-12 parents.

1. 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 survey⁴ 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).

4. See Appendix for survey methodology

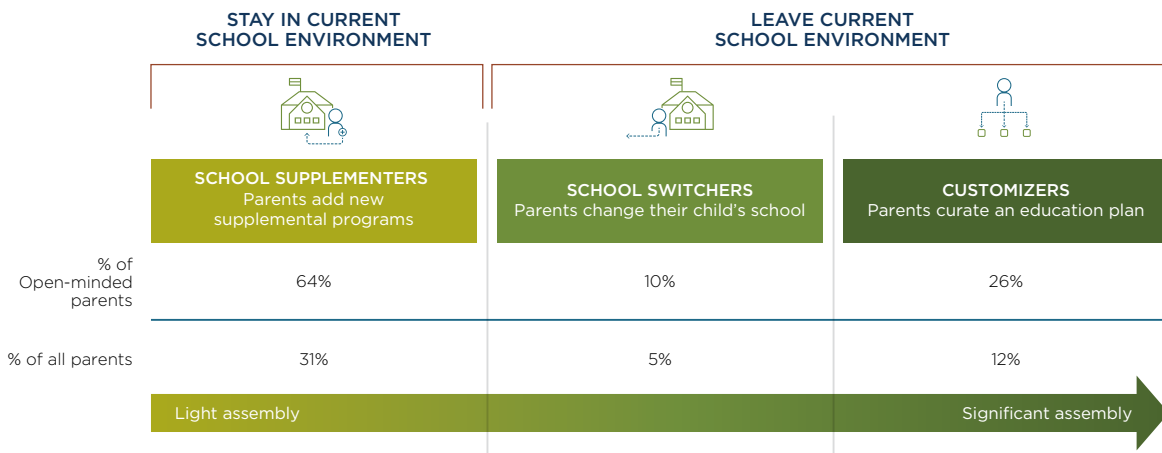
- **Parents are most likely to be spurred to action by mental health issues or academic challenges faced by their child.** Nearly half (46%) of parents in the Open-minded segment indicate mental health concerns are a primary factor leading them to consider an alternative pathway for their children. Similarly, 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 Exhibit 1).

Exhibit 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 institution⁵ and simultaneously add supplementary activities and experiences. These additional activities may include tutoring and enrichment programs, internships, and service learning, among others.⁶ 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-centric⁷ 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.⁸

Importantly, broad interest exists among parents across these three pathways regardless of demographic factors. Parents at varying income levels and with different educational backgrounds⁹ 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

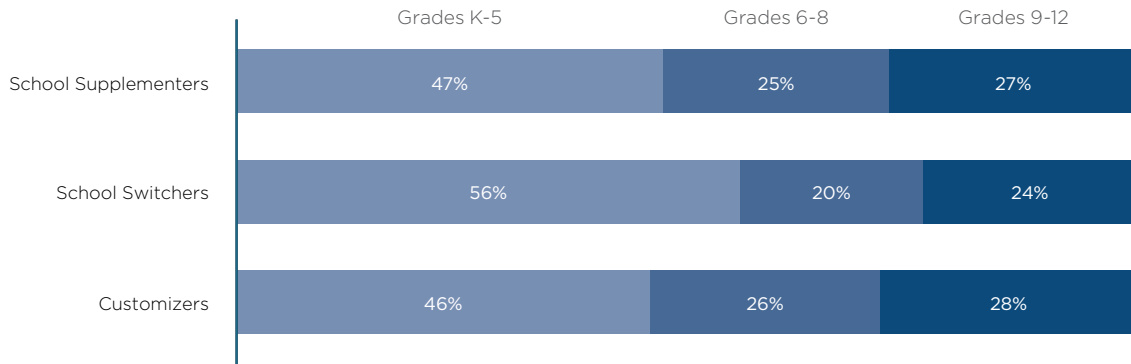
8. Based on an estimated enrollment of 49.4 million public school students and 4.9M private school students in the U.S. 80% of Customizers have their child enrolled in public school and 8% have them enrolled in private schools.

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 Exhibit 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.

Exhibit 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

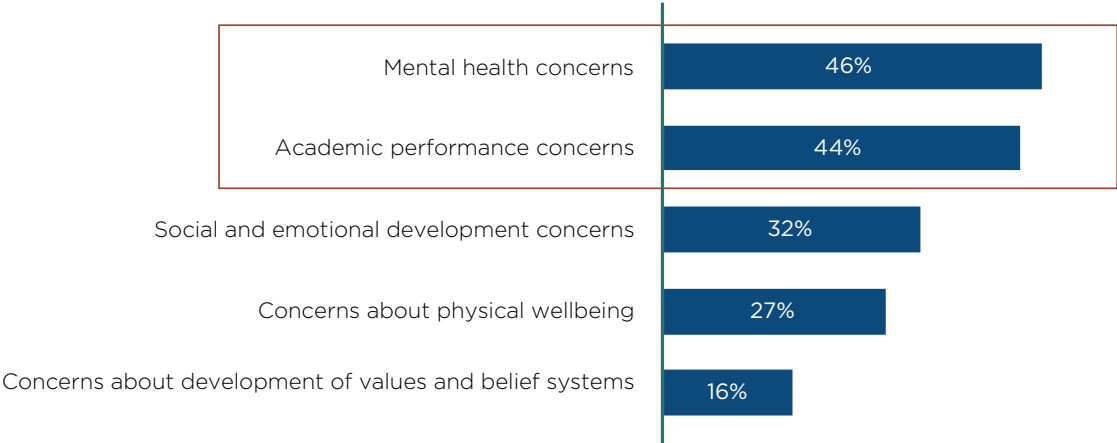
While high **interest** levels exist across all demographics for the three educational pathways, barriers to **access** persist, not surprisingly, based on families' financial circumstances. Nearly twice as many parents with household incomes under \$50,000 (46%) cite affordability as a barrier to accessing 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.

Exhibit 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.

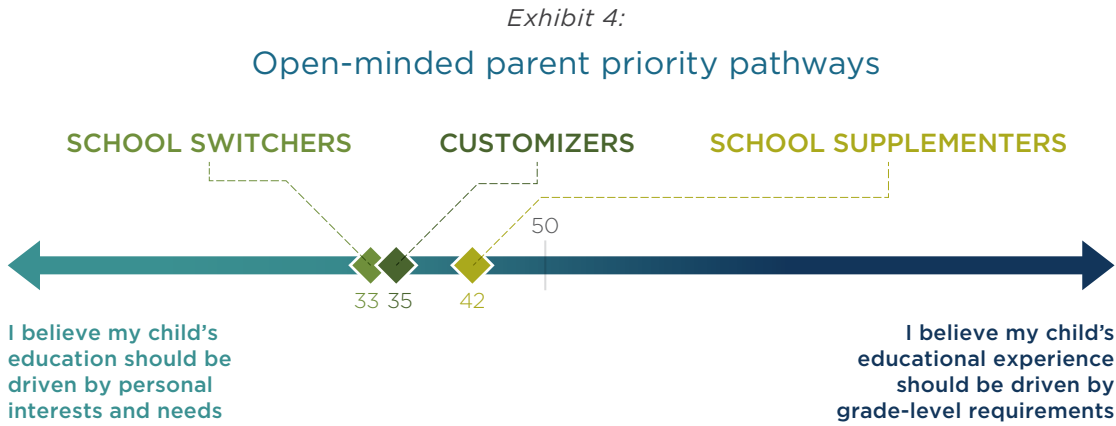
Not surprisingly, academic performance concerns also factor strongly in creating an impetus for change, with 44% of Open-minded parents citing it as a driving factor. Parents indicate that academic concerns boil down to students either not being challenged enough - *"I worry my child will get bored and 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.

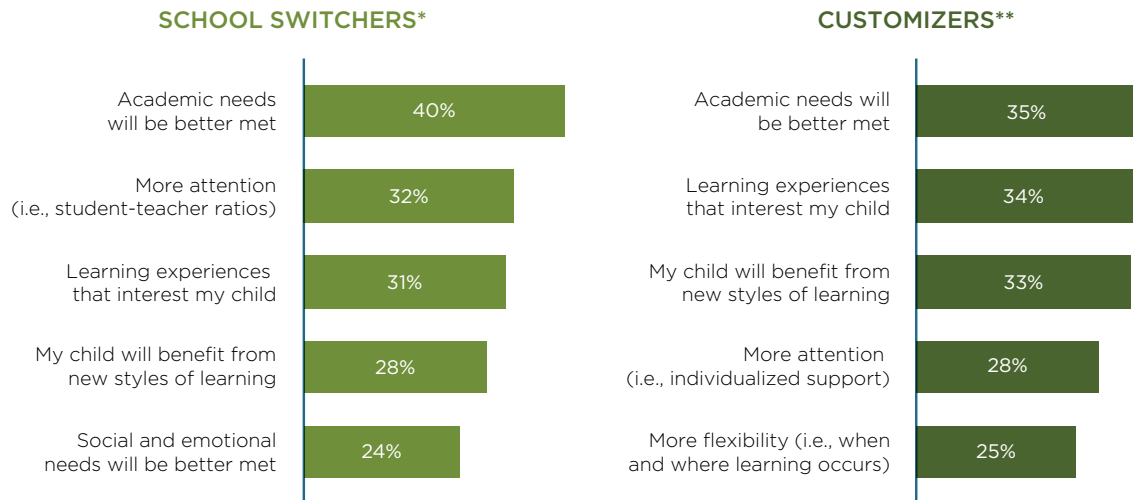


Source: Tyton Partners analysis

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%).

Exhibit 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."

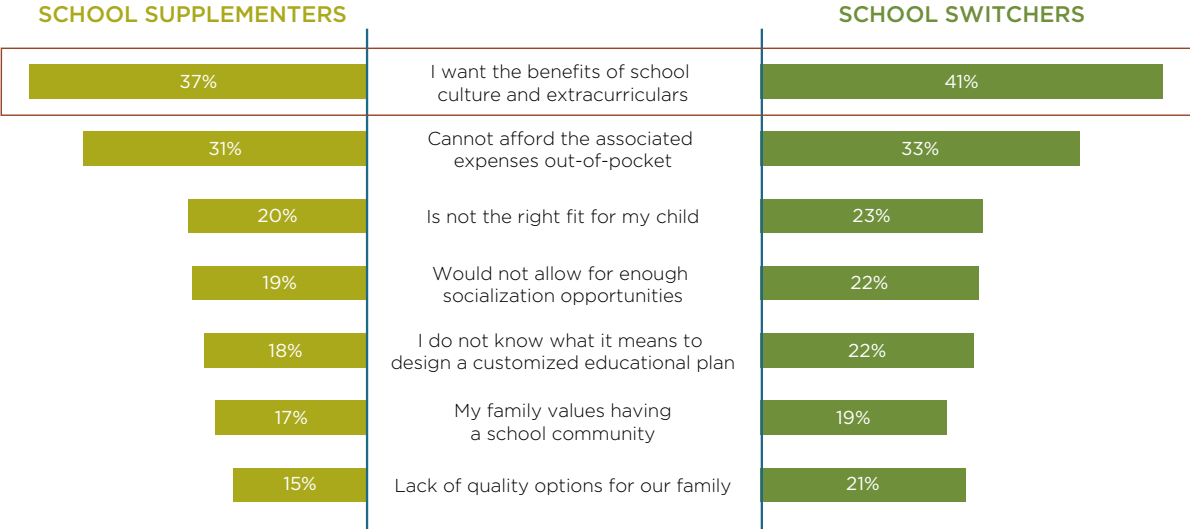
- High school parent, Tennessee

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

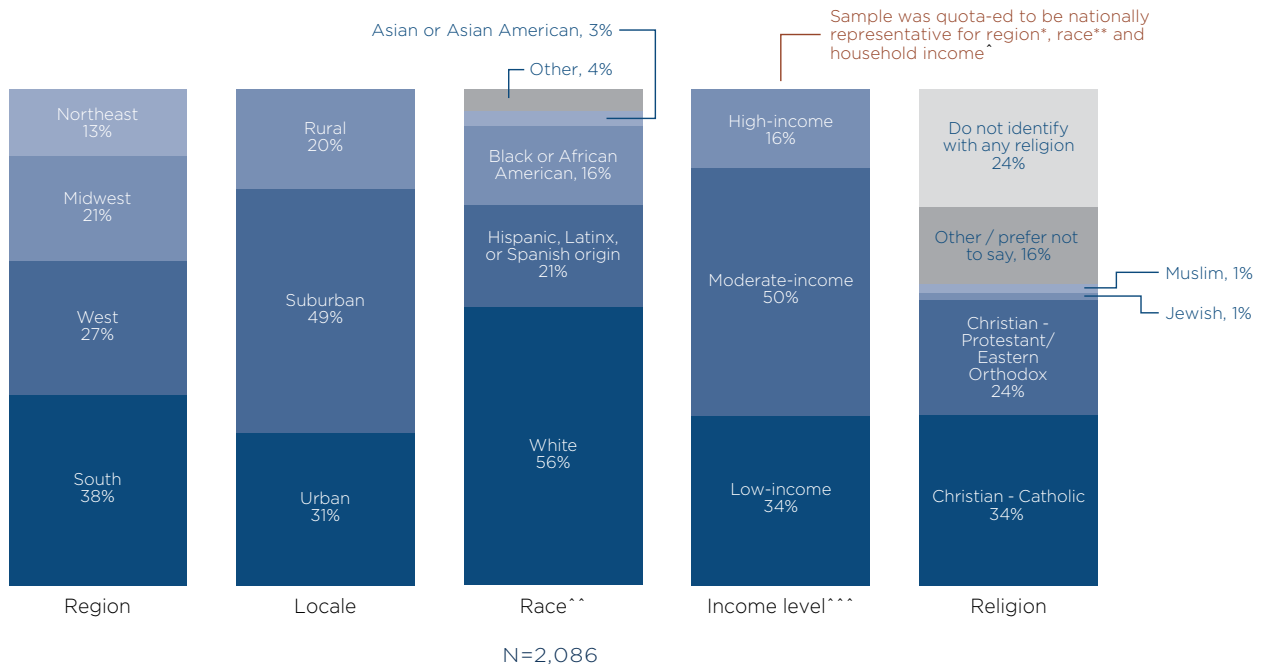
SURVEY METHODOLOGY

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.

Figure 7:

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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CHOOSE TO LEARN

2024

PART 2: THE OPEN-MINDED
K-12 PARENT JOURNEY AND
BARRIERS TO ACTION



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PART 2: THE OPEN-MINDED K-12 PARENT JOURNEY AND BARRIERS TO ACTION

Part 1 of *Choose to Learn 2024* detailed the notable interest and momentum Open-minded parents are demonstrating toward alternatives to traditional public and private schools. Twenty-six percent of Open-minded parents (12% of all parents) show a significant likelihood of pursuing a fully curated pathway for their children in the near term. Another 10% of Open-minded parents (5% of all parents) are likely to switch their children's school, most commonly to a private school. Among these Customizer and School Switcher segments, mental health and academic concerns emerge as the primary factors pushing families out of their current school environment.

In Part 2, we explore the journey parents embark on as they move from initial interest in alternatives to enrolling their children in a new educational pathway. While no parent journey is exactly alike, we find common awareness and access challenges may stifle parents on their way to pursuing new options. In addition, we highlight some of the ways the ecosystem of providers and supporting organizations can help parents “activate” the pathway they seek for their children.

KEY FINDINGS: PART 2

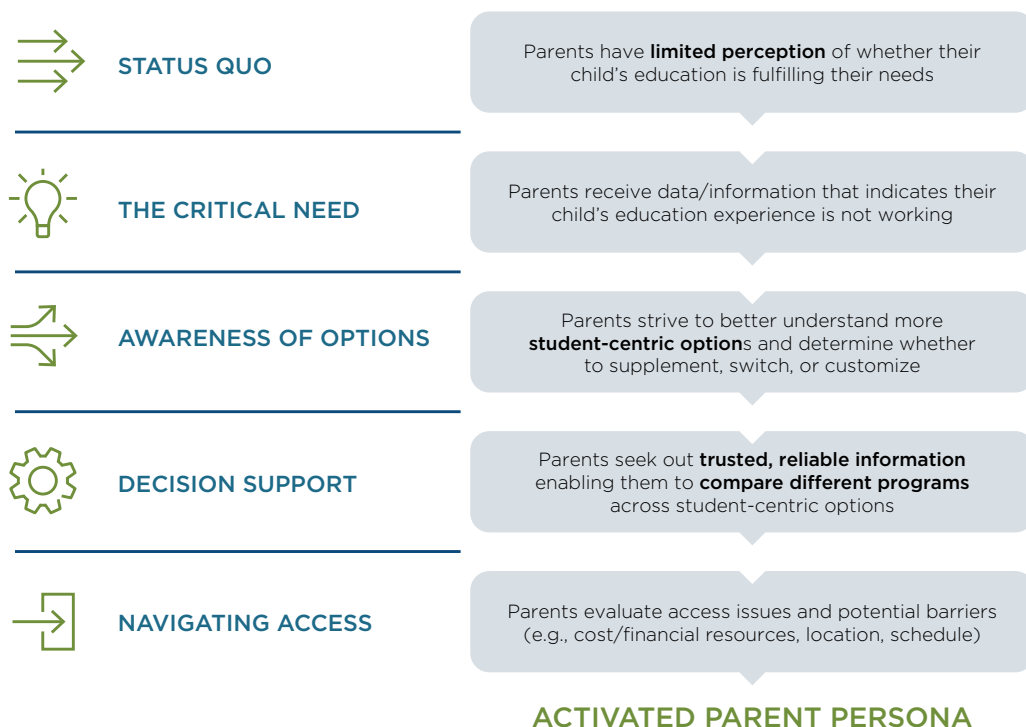
- **Parents take a multistage journey** to enroll their children in a new educational pathway. The process is triggered by recognition of a critical need, often tied to a mental health or academic challenge. Open-minded parents frequently struggle to understand the set of credible options available, after which they need to track down reliable data and information to support decision-making. Navigating these stages leaves parents evaluating equally challenging access issues—e.g., cost, location, and schedules—to facilitate new in- and out-of-school pathways.
- **Affordability and awareness are universal barriers across the parent journey.** Affordability (49%) and awareness of program types (40%) are the top two challenges facing Open-minded parents. Awareness of programs includes a lack of familiarity or knowledge of the pathway options available and the providers offering alternative models parents may select for their children.
- **To support decision-making, parents need higher-quality information about whether a program is a good or better fit for their children.** For parents, this information is paramount and valued more than details about a program's schedule or its distance from one's home. Parents indicate that providers can best articulate fit by focusing on how their program individualizes learning experiences based on the student's interest and illustrative examples of the delight they create.
- **Key actions to address the most significant barriers facing Open-minded parents** include establishing resources that provide better information on educational options and increasing transparency regarding initiatives that can address the financial challenges families face when considering alternative pathways.

OPEN-MINDED PARENTS MUST REACH SEVERAL BENCHMARKS ON PATH TO ALTERNATIVE K-12 OPTIONS

When catalyzed to act, Open-minded parents embark on the journey to find new educational options for their children with a sense of urgency. Parents recognize their children are in an untenable situation and require a new path. Our *Choose to Learn 2024* research maps this journey (see *Figure 1*), identifies specific junctures where challenges tend to arise, and highlights what may prevent parents from proceeding along this path.

Figure 1

The open-minded parent journey



Note: While we refer to and visually represent these as sequential stages, parents do not necessarily move through these three parts of the journey in a linear fashion.

By recognizing pivotal moments in this journey, the ecosystem of providers and supporting organizations can craft targeted strategies that help parents effectively reach a desired state for their children. Parents become “activated,” and their children ideally benefit from a more relevant and individualized learning environment.

THE CATALYST: MOST PARENTS ARE PUSHED—RATHER THAN PULLED—TO EXPLORE ALTERNATIVES

As noted in *Choose to Learn Part 1*, Open-minded parents generally find themselves “pushed” by circumstances to pursue a change for their children; parents discover aspects of their children’s school experience that are going poorly, often linked to concerns about mental health and/or academic performance. For many parents, when a school’s leaders or teachers fail to communicate their children’s struggles or take supporting actions, it triggers a change:

“My youngest was having a really hard time socially. He was so anxious, and it became too much, so we left.”

- Elementary school parent, Missouri

“My son has learning needs and his school was not communicating well around academic supports, so he was lost in the shuffle.”

- Elementary school parent, Michigan

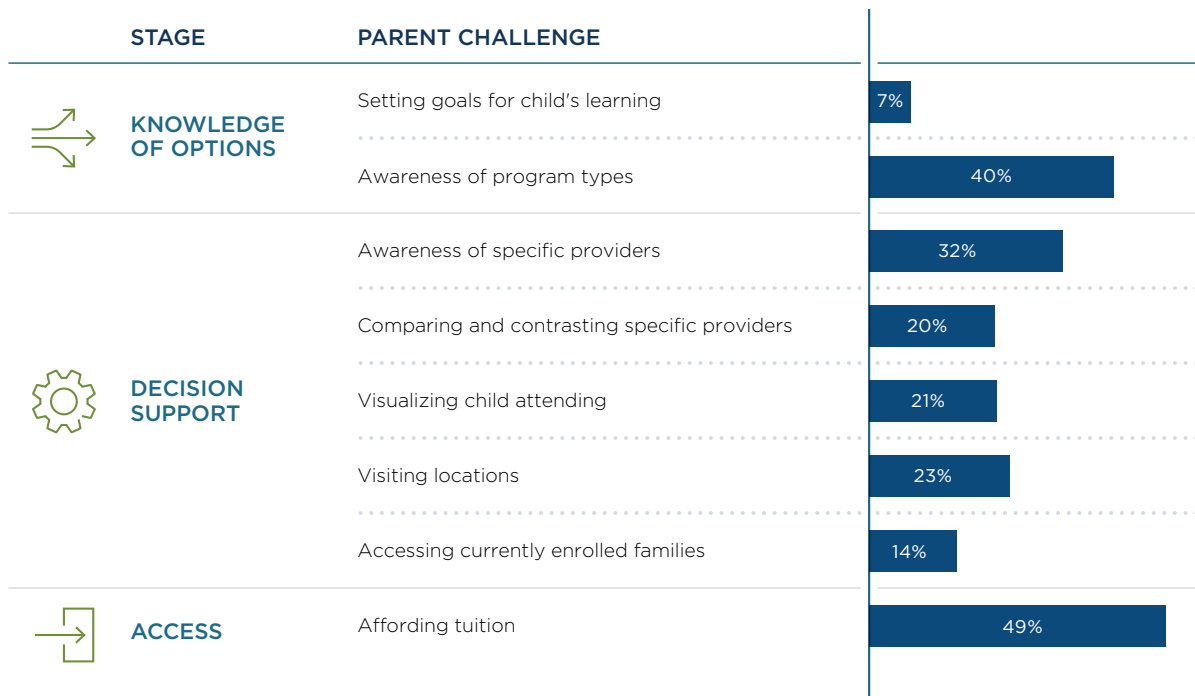
Parents are pushed out by concerns related to academic rigor, school transparency, and student happiness and “pulled” into experiences and opportunities more aligned with their children’s needs. When this occurs, Open-minded parents strive to achieve a transition that requires them to discover alternatives, identify decision-support data and resources, and gain access to tuition assistance programs.

KNOWLEDGE OF OPTIONS: LIMITED PARENTAL AWARENESS CURBS ACTION

Numerous challenges prevent parents who are enthusiastic about student-centric learning experiences from pursuing these aspirations for their children. Awareness of the types of programs available (40%) and knowledge of specific providers offering these programs (32%) stand out as the most formidable barriers deterring parents in the initial decision-making stages (see Figure 2).

Figure 2

Top challenges across the parent journey



Notes: *Survey questions: “Which of the following stages of your decision-making process do you struggle with the most? Select up to three.” n=1940.

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

These awareness barriers exist across all Open-minded parent personas: School Supplementers, School Switchers, and Customizers all report awareness as a roadblock to action. It is also noteworthy that minimal demographic differences exist among parents who cite program awareness as a barrier; parents across all income levels and geographies and with children at different ages/grade levels struggle with awareness of program types and specific providers.

The significance of awareness as a barrier to parental action cannot be overstated. Past Tyton Partners research has demonstrated that a mere 10% increase in overall awareness of alternative school models can result in a 40% surge in the likelihood of enrolling.¹ Most Open-minded parents are not part of the K-12 stakeholder community immersed in and tracking the dynamic range of innovative educational program models available in the wake of the pandemic. Notwithstanding their keen interest in alternative options for their children, the idea that parents will simply “find” them in their community is not a credible assumption. And, if Open-minded parents do not even know how to identify a universe of options to consider, the downstream Decision Support and Access stages—and supports—are generally moot.

DECISION SUPPORT: UNCERTAINTY AROUND “BEST FIT” HALTS SOME PARENTS IN TRACKS

Lacking awareness of program options, Open-minded parents are not in a strong position to determine if they are Supplementers, Switchers, or Customizers. Moreover, without direct examples that parents can juxtapose with their children’s current school experience, it is likely hard for many to imagine what an alternative program could look like. As such, Open-minded parents need more “education” of options at the program category/model level (e.g., microschoools, hybrid homeschooling, virtual learning, early career) and among various specific provider organizations to act on their aspirations. Similarly, without being exposed to the idea of a fully customized learning model—and exposure to parents and children pursuing it—a significant gap will likely persist between parents interested in the Customizer persona and those actually pursuing it.

Limited awareness of programs or providers is further exacerbated by a lack of quality information about the programs available to parents. Nearly 45% of School Switchers and Customizers cite the desire to ensure a good fit for their children as a significant barrier to acting on their interests. For these parent personas, fit is a more important consideration than logistical factors such as distance (34%) or scheduling (19%). In addition, a “good fit” extends beyond traditional academics: It entails discovering environments that offer more personalized support, helping children explore passions and develop them fully, and establishing behaviors around critical thinking and curiosity.

As part of this quest for “fit,” parents desire information about a particular educational program’s curricular approaches and learning styles. A high school parent in Texas reflected on the fit barrier, explaining that *“the risk is not knowing the new school, how they do academics, and whether it will work for my kid.”* Another high school parent in Maryland noted that they want an educational program that *“offers academic experiences that tie into [their] daughter’s interests.”*

Information about program logistics is straightforward; information about whether a program will be a good fit is what parents want and is much more elusive.

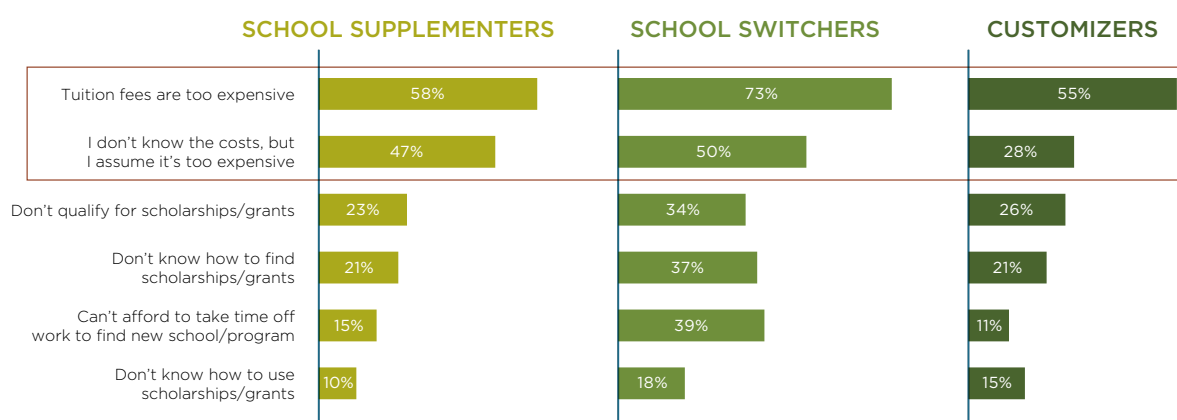
2. Tyton Partners, *School Disrupted 2022*

ACCESS: PERCEPTIONS AROUND AFFORDABILITY POSE HURDLES FOR OPEN-MINDED PARENTS

Even when parents navigate awareness of programs and potential providers to reach the Access stage of the journey, they still face challenges. Half of Open-minded parents (49%) identify affordability as a substantial barrier to selecting a new educational pathway. This dynamic is more acute for families with low household incomes and in rural areas. Among parents reporting family earnings of less than \$100K, 53% cite affordability as a barrier, and 55% of rural families express a heightened concern with cost, in contrast to urban families (43%). Helping parents explore financial aid and scholarship programs, as well as vouchers and education savings accounts (ESA) in some regions, is one approach to address this affordability issue.

Figure 3

Affordability as a barrier to new educational options



Notes: *Survey question: "What aspect of affordability poses the greatest challenge for your family? Select up to two." n=598 (School Supplementers), n=62 (School Switchers), n=181 (Customizers)

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

Affordability is both a real and a perceived barrier. Healthy percentages of School Supplementers (53%), School Switchers (40%), and Customizers (41%) identified program cost as a barrier. However, when investigated further, roughly half of these parents—47% of the School Supplementers and 50% of the School Switchers—indicate that they do not know the true cost of alternative options but assume that it would be prohibitive. This finding suggests that many Open-minded parents may be held back from exploring different pathways for their child by a perceived financial constraint, independent of the public and private subsidies that may be available. Enhanced price transparency and resources connecting parents to funding options would help address this access barrier.

ACTIVATING DEMAND: NAVIGATORS PLAY A CENTRAL ROLE IN CONNECTING FAMILIES WITH ALTERNATIVE K-12 OPTIONS

The challenges described above are not insurmountable. As Open-minded parents prioritize a better course for their children, a set of organizations are striving to help them gain knowledge, make decisions, and overcome barriers to access. We refer to these organizations as Navigators because, at their core, they support Open-minded parents in identifying, evaluating, and planning a new educational route for their children.

Navigators' solutions and supports vary. They include helping parents and students set goals for their education journey, tying those goals to potential pathways, accessing information about specific providers, and securing financial resources to afford programs, among other services. Some Navigators focus primarily on sharing data information about education providers (e.g., GreatSchools, Niche, Schola), while others deliver technology platforms that connect parents to ESAs and other funding sources (e.g., ClassWallet, Odyssey, Merit), and still others provide holistic services to support parents across their journey (e.g., Oakland REACH, Engaged Detroit, ReSchool Colorado).

Recognizing the challenges faced by Open-minded parents regardless of intended pathway (i.e., Supplementer, Switcher, Customizer), Navigators emerge as a compelling model that, when purposefully designed, could help parents successfully address these barriers. In *Choose to Learn 2024 Part 3*, we detail what makes Navigators highly impactful in supporting families and driving change within the education landscape. We also consider the pivotal roles that investors and policymakers play in sustaining and strengthening this avenue of support for parents.

APPENDIX

THANKS & ACKNOWLEDGEMENT

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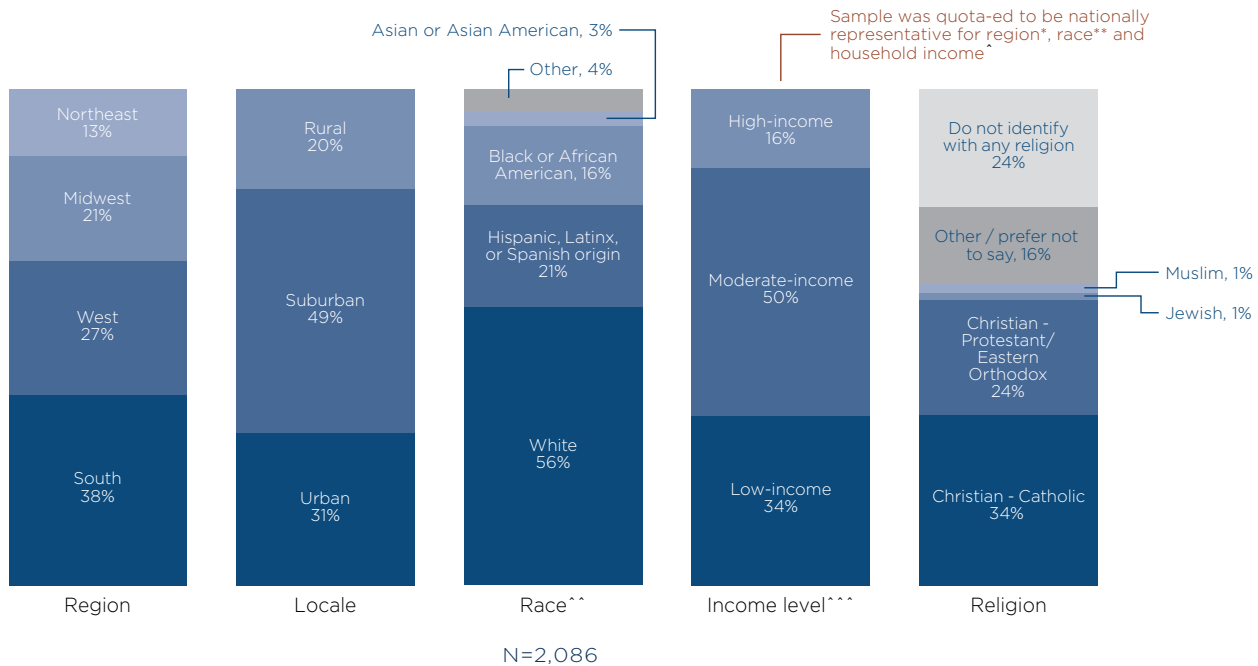
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- **Parent focus groups** › Conducted focus groups with Open-minded parents and Activated parents, speaking with more than 20 parents geographically spread across the U.S., to better understand parent aspirations and hesitations around changing their 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

TYTON PARTNERS

Tyton Partners is the leading provider of strategy consulting and investment banking 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.

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WALTON FAMILY FOUNDATION

The Walton Family Foundation is, at its core, a family-led foundation. Three generations of the descendants of our founders, Sam and Helen Walton, and their spouses, work together to lead the foundation and create access to opportunity for people and communities. We work in three areas: improving education, protecting rivers and oceans and the communities they support, and investing in our home region of Northwest Arkansas and the Arkansas-Mississippi Delta. To learn more, visit waltonfamilyfoundation.org.

STAND TOGETHER TRUST

Stand Together Trust invests in social entrepreneurs developing solutions to America's most pressing problems. Learn more at www.standtogethertrust.org and www.standtogether.org. Join the Stand Together philanthropic community on Facebook, Twitter, LinkedIn, Instagram, and YouTube.

CHOOSE TO LEARN

2024

PART 3: A BREAKTHROUGH
IN K-12 PARENT NAVIGATION



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PART 3: A BREAKTHROUGH IN K-12 PARENT NAVIGATION

In Parts 1 and 2 of *Choose to Learn 2024*, we detailed the notable interest and momentum Open-minded parents are demonstrating regarding alternatives to traditional public and private schools. We framed the journey that parents embark on when pursuing alternative pathways and identified key barriers to activation, including awareness of program types and providers, as well as affordability.

In this final part of the series, we explore the type of support parents seek when making decisions, the information sources they trust, and their preferred means of receiving guidance. To that end, we shed light on how an emerging cohort of “Navigators” can and are crafting solutions that mitigate barriers to access and are tuned to the preferences and needs of parents.

AN EMERGENT LANDSCAPE OF “NAVIGATOR” SOLUTIONS IS FORMING

For Open-minded parents to pursue new educational options that are better aligned with their aspirations, they need support that accommodates their individual needs—and the needs of their children. In the past decade, a new cohort of organizations has emerged to support parents in this regard and facilitate these educational transitions. Some models, like private school counseling and homeschool community networks, have been around for years. However, the increased volume and velocity of interest in public school alternatives and the proliferation of educational options and models demand an expansion in the scope and quality of navigation services.

We define “Navigators” as organizations that support parents in discovering, planning, and successfully enrolling in a new school and/or student enrichment program. Specifically, Navigators possess the following attributes:

1. Are built for parents or families
2. Provide information and resources—e.g., publish informative articles, host events or workshops, deliver coaching services, offer search tools—to facilitate awareness and access to student-centered options
3. Focus on a range of in- and out-of-school learning models—e.g., after-school programs, independent schools, fully customized education plans¹

Navigator models are varied and still somewhat fluid; the **modality of services** offered and **learner-centered pathway(s) supported** are two notable segment considerations when evaluating organizations. Some Navigators are primarily technology-based, while others are more service-oriented; the former may offer platforms that enable parents to select and compare programs, while the latter may focus on mentorship or in-person training that supports parent decision-making and access. Navigators typically connect families to one of three pathways: supplementing their core school, switching to an alternative school, or fully customizing.

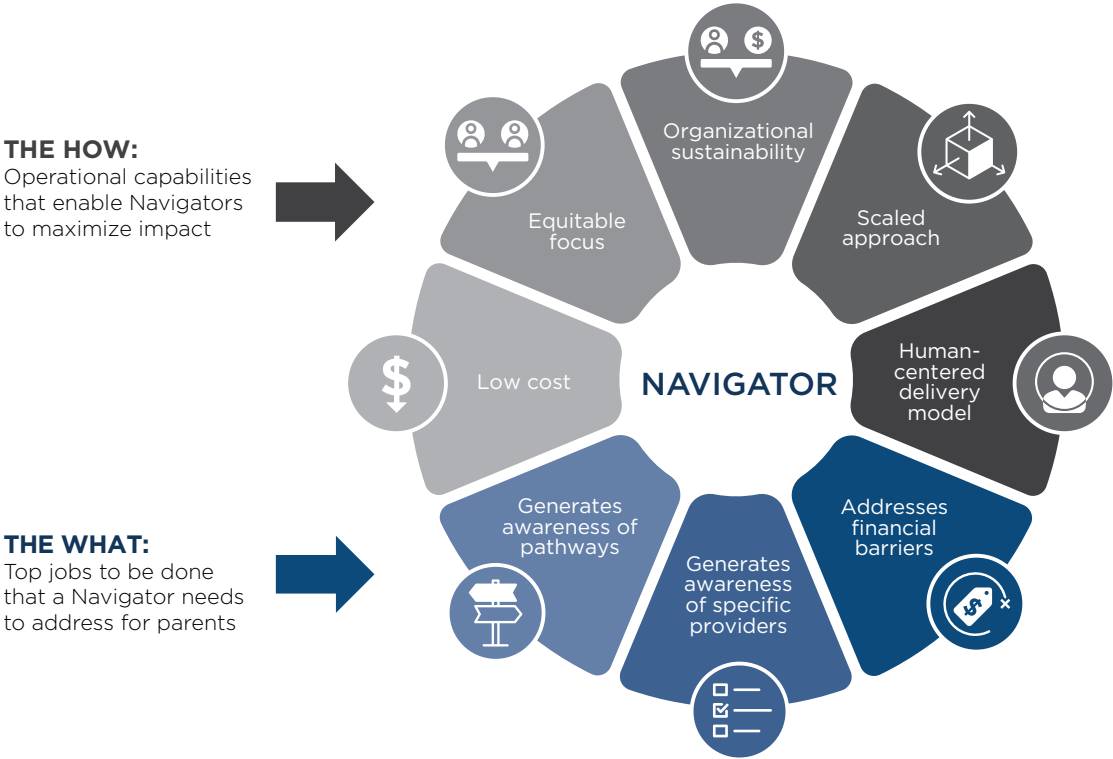
1. In this body of research, we did not consider Navigators focused on public school access, college selection, or policy change. See appendix for solution model segments and definitions.

DESIGNING HIGH-IMPACT NAVIGATORS: A BLUEPRINT FOR SUCCESS

This ecosystem of Navigators is evolving rapidly, catalyzed by increasing parent discretionary spending on supplemental out-of-school programs and an increasing number of states with education savings account programs (ESAs)² or other school choice initiatives. As such, Navigator organizations are striving to find the right mix of “products,” tools, and services to best meet the needs of parents; many are also striving to find financially sustainable models. In support of that effort, we have identified a core set of model design attributes that—in the aggregate—describe a **high-impact** Navigator.³

High-impact Navigators have designed their organizations to account for business model attributes in eight distinct categories (See Figure 1); in combination, these attributes comprise a blueprint for how Navigator models can be most impactful in supporting Open-minded parents as they find their way through the complex landscape of decisions related to their children’s education. These attributes span both operational considerations (the “How”) as well as priority gaps experienced by parents where they need the support to move forward (the “What”).

Figure 1
Attributes of a High-impact Navigator



2. An education savings account (ESA) is a school-choice funding mechanism distinct from other approaches such as vouchers and tax-credit scholarships. With ESAs, state governments allocate a portion of the funds designated for a child’s public education to a specialized account controlled by parents that can be used flexibly to fund educational alternatives. For more information on ESAs, including access and usage dynamics, see Tyton Partners’ *Paying for Choice 2024 publication*

3. These attributes were derived through interviews with leaders at Navigator organizations, school choice research and advocacy professionals, and parents, as well as in-depth analysis of current models of existing players

Across these attributes informing an organization’s design, certain exemplar approaches exist that distinguish Navigators most effective at meeting parents’ specific areas of need (see Figure 2). For example, Navigators that pair parents with a mentor or coach (i.e., employ a human-centered delivery model) are more likely to drive parent confidence in their decision-making. When asked what supports they value most for decision-making, Open-minded parents say that a mentor or coach (28%) is more valuable than other supports such as curated recommendations from an online resource (25%) and exposure to families enrolled in the school of interest (15%). While these other resources remain important, mentorship allows for a level of personalization combined with expertise that is highly valued. Mentorship can also play an important role in making parents feel more comfortable with exiting a school and reimagining what different opportunities may look like for their children outside of a “traditional” school environment.

Figure 2
Attributes of High-impact Navigators

	ATTRIBUTE	EXEMPLAR APPROACH <small>Validated through parent survey</small>	DESCRIPTION
THE HOW	Human-centered delivery model	Pairs parents with a mentor or coach	Delivery model component should connect parents with a coach/mentor (whether expert or peer) to support them in their decision-making process
	Scaled approach	Already scaled nationally or across multiple states	Navigator either currently has national reach or serves families across multiple states
	Organizational sustainability	Diverse and/or stable revenue streams	Navigators’ current business and operating model ensures long-term viability through diverse revenue streams (e.g., government funding through ESAs, sponsored content from providers)
	Equitable focus	Commits to serving diverse or underserved populations	Demonstrates a dedicated commitment to promoting fairness, reducing disparities among diverse student populations , and/or serving historically underserved populations
	Low cost	Free access for families	Offers free access to information and resources OR makes their product/services available through sliding scale fees that are adjusted based on income/need
THE WHAT	Generates awareness of learner-centered pathways	Focuses on learner-centered pathways	Focuses on connecting parents to highly personalized learner-centered pathways (i.e., full curation)
	Generates awareness of specific providers	Curates best-fit providers	Generates a curated list of providers generated from a comprehensive set of providers depending on families’ unique needs
	Addresses financial barriers	Connects parents to scholarships, grants, or ESAs	Connects parents to financial resources such as ESAs or grants and provides coaching on how to use the resources

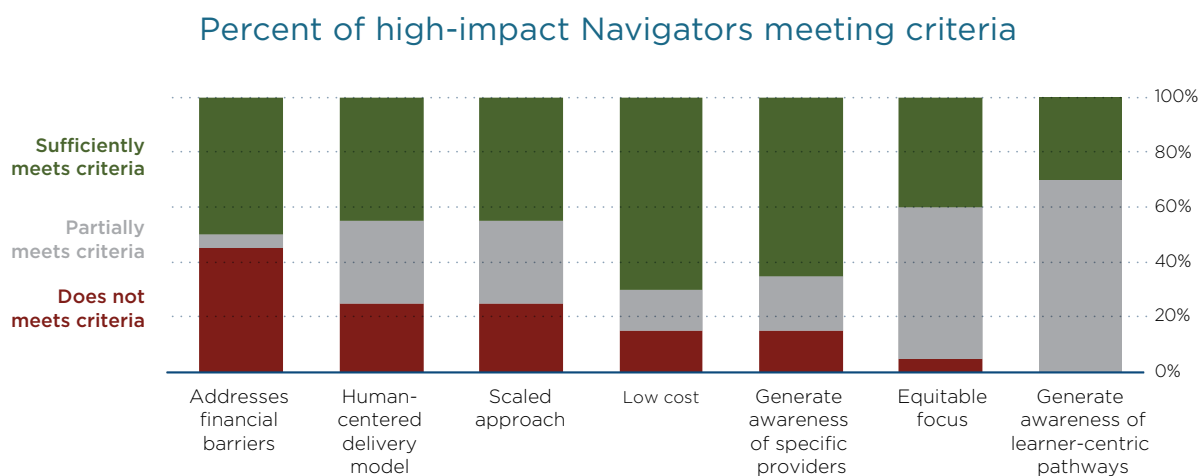
As we addressed in Part 2 of Choose to Learn 2024, Open-minded parents indicate that they struggle most with certain stages of the parent journey. These stages represent the “What” of the Navigator framework. For example, Navigators that help parents address knowledge/information gaps and perceived financial barriers—and do so in a way that provides access to curated recommendations and supports—have the greatest potential to attract users and lead them to enroll in new in- and out-of-school learning opportunities.

Clarifying Navigators’ key jobs-to-be-done relative to parents’ greatest needs—and designing intentionally for them—represents an important step to better support parents’ ESA journey and reinforce states’ program implementation.

ASSESSING THE CURRENT STATE OF THE NAVIGATOR LANDSCAPE: SCALABILITY VS. HUMAN-CENTERED APPROACH AS A KEY TENSION

A cohort evaluation of the most prominent Navigator organizations and models highlights where some of the most significant gaps exist between current and ideal exemplar states. Among the Navigator cohort reviewed⁴, providers' models were least mature in regards to three attributes: human-centered delivery model, scaled approach, and addressing financial barriers. Addressing these attributes in support of parents is particularly important (see Figure 3).

Figure 3



Note: List of 20 Navigators evaluated against criteria are listed in the [Appendix](#)

- Human-centered delivery model:** Parents report feeling most confident in selecting new education options if they have the opportunity to meet one-on-one with a mentor or coach; this type of support is substantially more desired than speaking individually with a teacher, friend/family member, or someone in their community. Parents seek guidance and personalized recommendations from someone who they feel is an expert in the space.
- Scalability:** The question of scale is an immediate concern when considering the applicability of a 1:1 coaching model, which is, by nature, time- and resource-intensive. Navigators that have successfully scaled a human-centered approach do so by providing information on a broad scope (e.g., nationally or regionally) and then following up with parents directly to provide hands-on coaching that helps them synthesize—and act—on this information.
- Addressing financial barriers:** Navigators that connect parents to funding resources are addressing a seemingly straightforward but often critical barrier to access: parents' ability to afford alternative programs. Exemplar models help parents track down and access various funding programs—including scholarships, grants, and ESAs, among others—and, in the best-case scenario, put funds and/or reimbursements directly into an “account” for parents. ClassWallet, Merit, and Odyssey are some examples of Navigators working with states to facilitate the distribution and tracking

4. A full list of organizations included as part of the landscape review is listed in the [Appendix](#)

of ESA and microgrant dollars. Advocates and sponsors of Navigator organizations should prioritize capacity-building initiatives that address overall scalability, mentorship, and financial support for parents. These attributes are most critical in assisting parents who desire alternative options for their children.

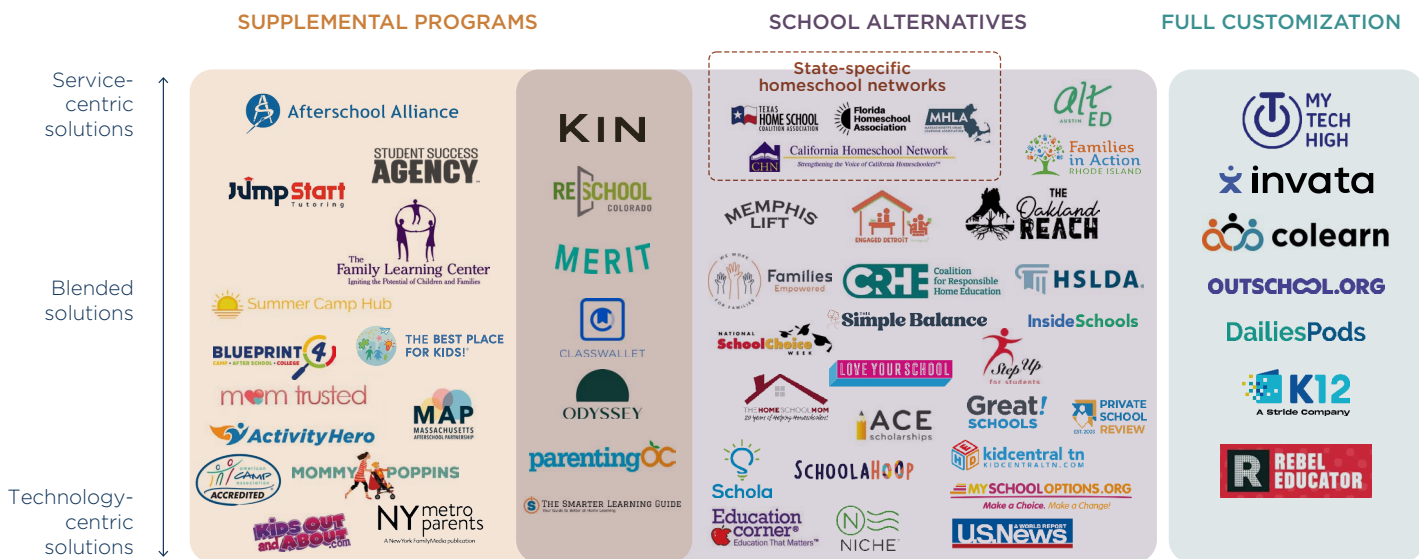
MAPPING THE NAVIGATOR ECOSYSTEM

At the ecosystem level, there are numerous Navigator solutions supporting parents at both local and regional/national levels. These Navigators exist on a spectrum, particularly in terms of whether their solutions are more service-centric or technology-centric; the former tend to have a key strength in their depth of impact, while the latter possess strong reach and scale. Moreover, Navigators tend to focus on a primary parent pathway—i.e., School Supplemter, School Switcher, or Customizer. A select few enable access to both supplemental programs and school alternatives.

By mapping Navigators on these axes, it is apparent that there is a relatively limited supply of models that support fully curated pathways. Mapping notable Navigators against these two axes highlights a potential disconnect between what parents report they are seeking and the pathways Navigators are supporting (see Figure 4). While 12% of all parents express interest in a full curation learning model for their children (i.e., Customizers) and only 5% report interest in an alternative to their child’s current school (i.e., School Switchers), a significant number of Navigators are focused on serving School Switchers. Conversely, a more limited universe of Navigators is oriented toward the needs of Customizers.

Figure 4

Illustrative Navigator Landscape Overview



This mismatch between parent interest (and latent demand) and the existing supply of Navigators underscores the need for a more diverse and tailored ecosystem of support. Addressing this gap will better serve parents, offering them the guidance and resources they need to make informed decisions about their children’s education.

CALL TO ACTION: BUILDING SUSTAINABLE NAVIGATOR MODELS

Against the backdrop of parent aspirations for a broad range of student-centric learning experiences, a host of barriers still constrain parents' ability to make the changes they aspire to. While the availability of “supply”—i.e., school and program models that may be in addition to or an alternative to local public schools—remains a key gap in some regions and communities, we believe that this market gap will resolve itself as parent demand matures. In order for that demand to mature, the K-12 ecosystem needs more high-quality Navigators that can bridge human-centered delivery and scaled impact while demonstrating a durable organizational model.

Currently, there is a noticeable shortage of solutions that effectively target this intersection—i.e., human-centered delivery and scale—despite being the very model that parents are most likely to rely on for assistance. Furthermore, Navigators should place this service emphasis on increasing awareness of educational options and addressing financial barriers. Given the significance of these two areas as barriers that prevent parents from taking action, focusing on these topics should make a substantial difference in guiding Open-minded families toward informed, successful decisions. Encouraging Navigators that can deliver personalized guidance in an efficient manner is a business model design opportunity that could significantly impact families' ability to pursue new educational options.

However, Navigators and their advocates must pair this service-model delivery approach with equally robust efforts to develop financially viable business models that do not depend on singular, unpredictable funding sources such as government funding programs or philanthropic organizations. Our research indicates that parents are willing to pay—across all household income levels—for services that can support their exploration of choice options. With nearly 70% of K-12 parents already pursuing or willing to pursue alternative pathways as Supplementers, Switchers, or Customers and willing to spend ~\$400⁵, on average, for Navigator-type services, the market opportunity could be several billion dollars. Building impactful, outcomes-oriented Navigator organizations that thread together government, philanthropic, and earned income revenue streams must be a priority.

As we look to the future of Open-minded families and the Navigator market, a notable set of observations and questions emerge:

1. A sustainable approach is essential to provide meaningful support to parents and students. How can investors contribute to the Navigator landscape in a manner that guarantees the long-term sustainability of these organizations?
2. Innovative technologies, such as artificial intelligence and chatbots, remain largely underutilized within this space. How can these innovative technologies and tools be harnessed to further enhance the effectiveness of Navigators? How might these technologies reshape the educational landscape in the coming years?
3. Among the eight design attributes identified, what are the specific features that will drive parents to platforms with fidelity?
4. Switching away from a core schooling experience remains a complicated emotional decision for families. Given the importance of trust and connection in making those decisions, what role does the community need to play, even within a tech-oriented platform?

5. *Paying for Choice 2024*

At Tyton Partners, we look forward to picking up exploration of these—and other—key issues in the coming months to understand how the K-12 choice landscape may continue to evolve.

APPENDIX

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- **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

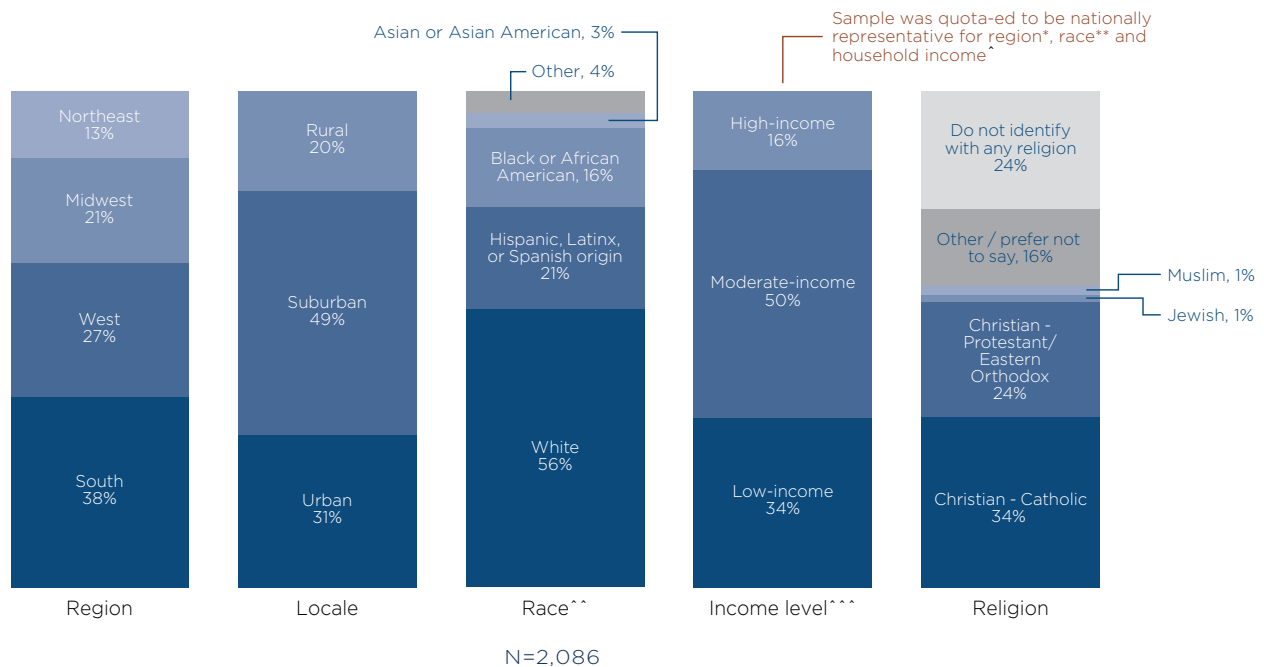
SURVEY METHODOLOGY

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

TAXONOMY OF NAVIGATOR MODELS

We refer to different segments of Navigators along a continuum of more in-person, service-based solutions to more virtual, technology-based solutions. This continuum is reflected in the y-axis in Figure 4 on page 7. Similarly, Navigators may focus on supporting parents in one or more learner-centered pathways, which is reflected by the x-axis in Figure 4. The key terms comprising that graphic are defined below.

PARENT-CENTERED APPROACH		FOCUS ON LEARNER-CENTERED MODELS		
Service-based solutions	Technology-only solutions	Supplemental programs	School alternatives	Full assembly
Organizations that offer mentorship or service-based offerings (e.g., virtual and/or in-person seminars, workshops) as part of their model. These organizations may or may not have web platform or application capabilities	Platforms/websites that enable parents to compare and select individual providers/programs (e.g., by filtering based on equity, test scores, satisfaction)	<p>Facilitates parents' awareness of and/or access to:</p> <ol style="list-style-type: none"> 1) Academic acceleration programs 2) Extracurricular/personal enrichment programs 3) Career exploration/exposure programs 	<p>Facilitates parents' awareness of and/or access to:</p> <p>Unconventional school alternative models, including microschoools, homeschools, or hybrid homeschools</p>	<p>Facilitates parents' awareness of and/or access to:</p> <p>Fully personalized educational models (i.e., helps parents curate their own schedule/plan for their child either on their own or through a guide/mentor)</p>

Our team identified a universe of more than 64 Navigators in support of our research and analysis; we conducted a more detailed review of a subset of this group, highlighted below.

- Alt Ed
- Colearn
- Dailies Pod
- Engaged Detroit
- Families Empowered
- Families in Action Rhode Island
- Great Schools
- Invata
- K12 Stride
- Love Your School
- Memphis Lift
- Merit
- My Tech High
- The Oakland Reach
- Odyssey
- Outschool.org
- Rebel Educator
- Reschool Colorado
- Schola
- Undivided

ABOUT

TYTON PARTNERS

Tyton Partners is the leading provider of strategy consulting and investment banking 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.

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WALTON FAMILY FOUNDATION

The Walton Family Foundation is, at its core, a family-led foundation. Three generations of the descendants of our founders, Sam and Helen Walton, and their spouses, work together to lead the foundation and create access to opportunity for people and communities. We work in three areas: improving education, protecting rivers and oceans and the communities they support, and investing in our home region of Northwest Arkansas and the Arkansas-Mississippi Delta. To learn more, visit waltonfamilyfoundation.org.

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Stand Together Trust invests in social entrepreneurs developing solutions to America's most pressing problems. Learn more at www.standtogethertrust.org and www.standtogether.org. Join the Stand Together philanthropic community on Facebook, Twitter, LinkedIn, Instagram, and YouTube.