

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

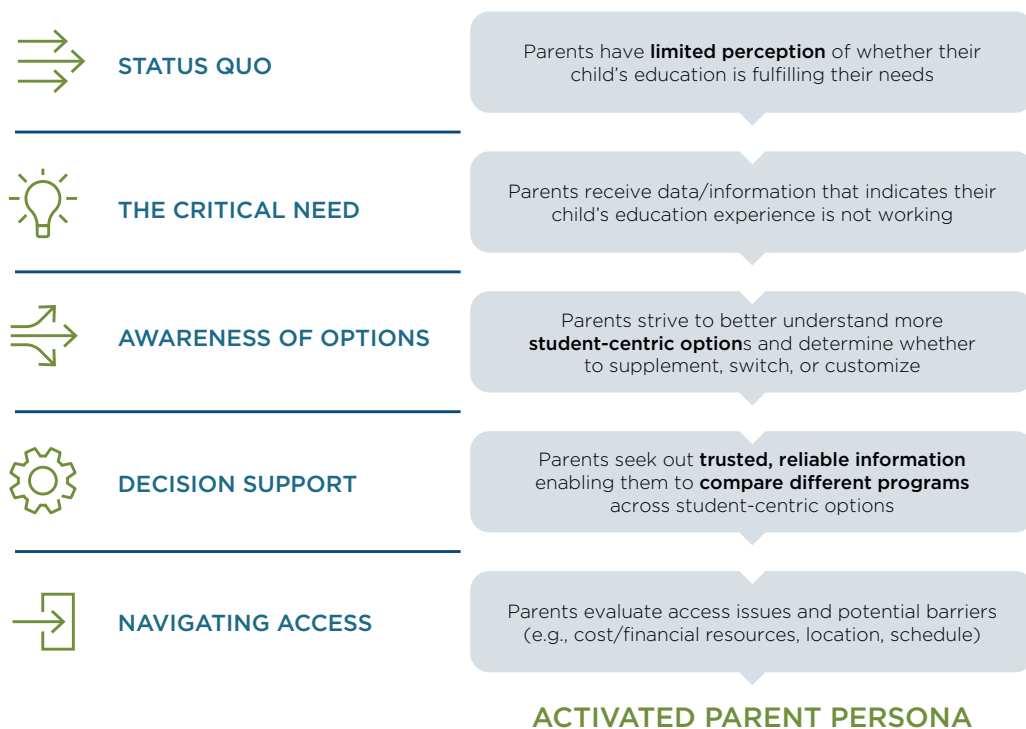
- **Parents take a multistage journey** to enroll their children in a new educational pathway. The process is triggered by recognition of a critical need, often tied to a mental health or academic challenge. Open-minded parents frequently struggle to understand the set of credible options available, 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

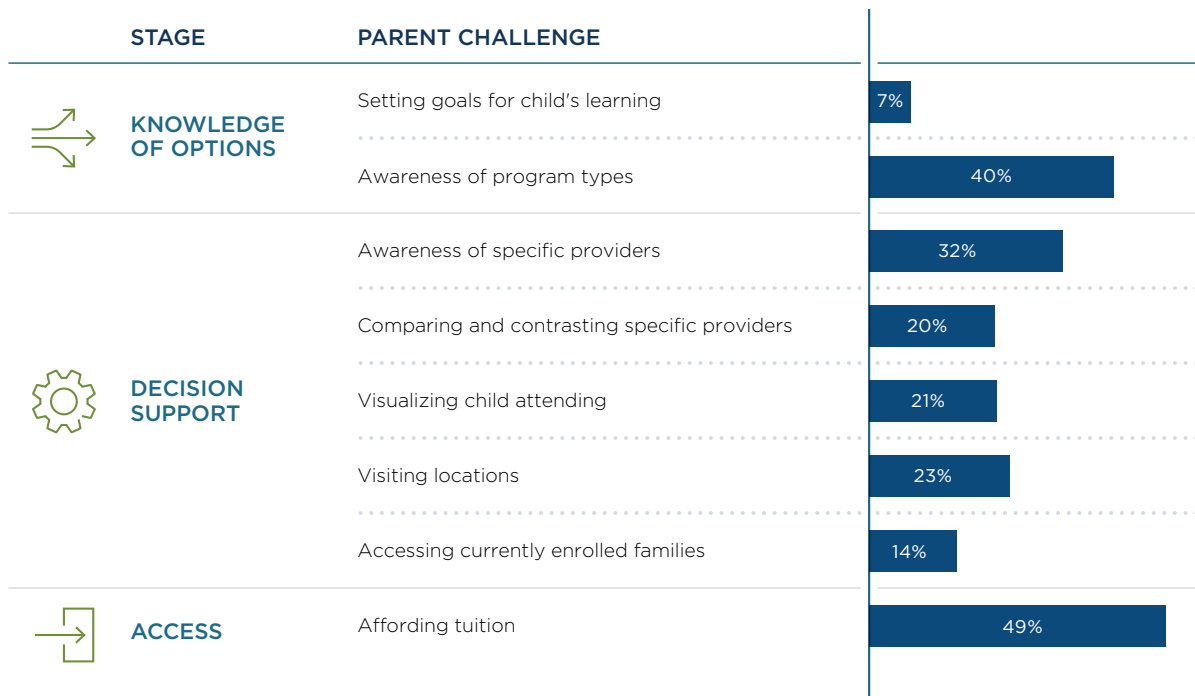
Parents are pushed out by concerns related to academic rigor, school transparency, and student happiness and “pulled” into experiences and opportunities more aligned with their children’s needs. When this occurs, Open-minded parents strive to achieve a transition that requires them to discover alternatives,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

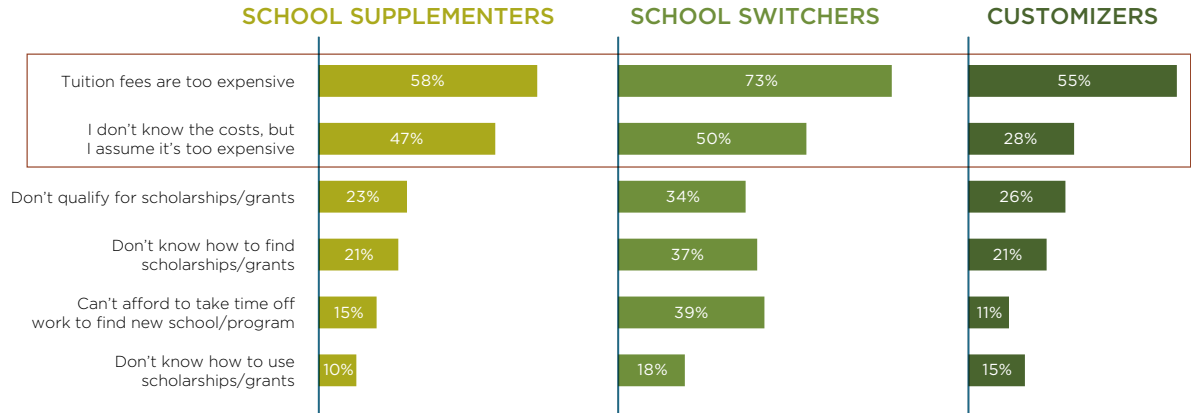
2. Tyton Partners, *School Disrupted 2022*

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

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.

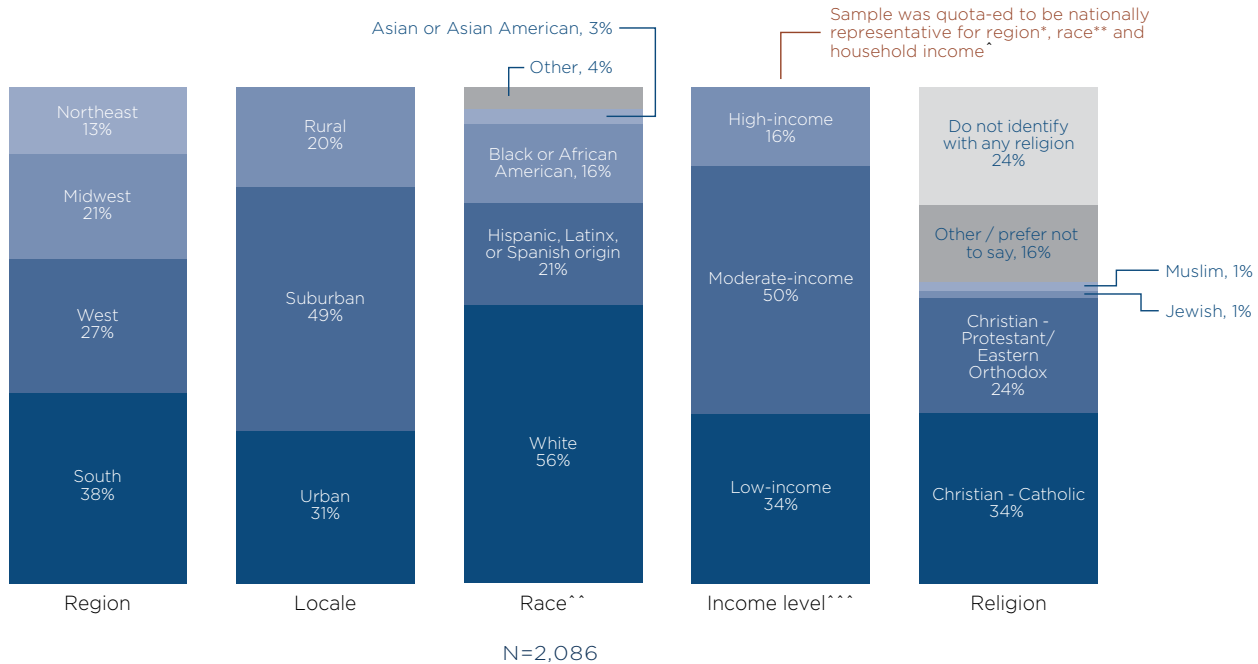
- **Parent survey** › Fielded a large-scale survey generating feedback from more than 2,000 U.S. “Open-minded” parents with a desire to make a change to their child’s learning experience
- **Parent focus groups** › Conducted focus groups with Open-minded parents and Activated parents, speaking with more 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 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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