CHOOSE TO LEARN

CONNECTING IN- AND OUT-OF-SCHOOL LEARNING IN A POST-PANDEMIC WORLD

WALTON FAMILY FOUNDATION

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CHOOSE TO LEARN

CONTEXT AND ARGUMENT

Early in the 1980's, the *Choose Your Own Adventure* series took the U.S. by storm. Children who spent their days following the rules could now open a book and, through a series of choices, determine their own path forward. The reader's experiences and outcomes were dictated by personal interest rather than authority and tradition—the books gave kids agency. People were hooked: since 1979, the franchise has sold more than 270 million copies and become the fourth best-selling children's book series of all time.[1]

Across K-12, families have theoretically always had choices: namely, where their child goes to school and how they spend their time outside of school. But these choices present too many compromises. Families value school—it can be cost-effective, convenient, credible—but they rarely depend on it to deliver the full-range of learning outcomes—and joy—they aspire towards. Out-of-school learning can likewise be inadequate: children engage in programs to pursue their passions, but they rarely get "credit" for these experiences, especially as it relates to college and/or career pathway efforts. For a child to flourish, it can require an exhaustive amount of time and resources.

These choices are also not distributed equitably: children from historically underserved backgrounds[2] have far more limited K-12 experiences to choose from—and, in turn, a more limited range of outcomes. For every one family that has the time and resources to select the ideal school setting for their child, curate music lessons and robotics courses, and send their child to sleepaway camp—to *choose their own K-12 adventure*—there are many who rely entirely on a local school, which has limited capacity, to deliver the same collection of experiences and outcomes. Parents have common aspirations—they want their child to flourish—but the ability for all families to achieve this in our current state is not yet realized.

How can our K-12 education system deliver a more credible union between academic growth, extracurricular passion, and personal fulfillment? How can we work to connect families more seamlessly to in- and out-of-school opportunities consistent with their values and needs and regardless of their life or economic circumstances?

It is in this spirit that Tyton Partners set out in Spring 2022 to better understand the landscape of K-12 experiences and outcomes U.S. families can pursue—inclusive of both in- and out-of-school learning—and explore the extent to which our current state aligns to parents' values and needs. Our research includes a survey of K-12 parents that generated more than 3,000 participants, as well as a separate campaign to gather feedback from more than 150 K-12 suppliers—school and out-of-school operators who serve children and families directly.

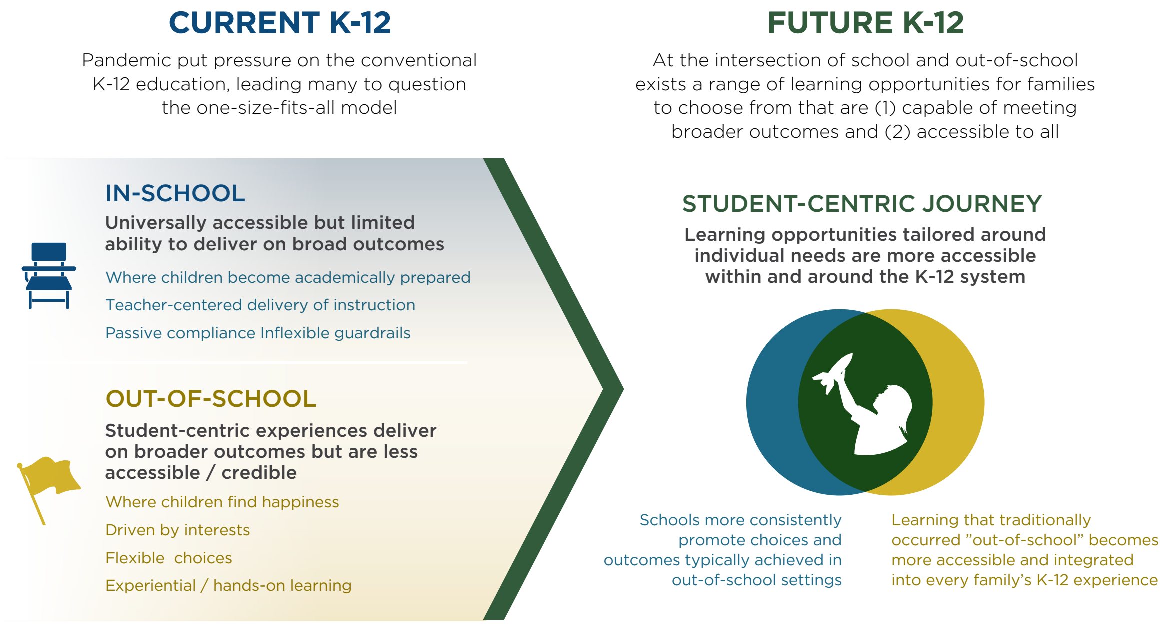
In viewing K-12 through this broad lens, we aim to better understand issues impacting every family—including more than 40 million who send their children to public school. Relative to issues of equity and access, our local public districts play a crucial role. At the same time, out-of-system programs are critical to ensure ample supply and variety. Because of this, we focus this work not on one single category of K-12 education, but instead on the ways in which the K-12 ecosystem broadly can recenter around the needs of students and families.

1. *https://www.newyorker.com/magazine/2022/09/19/the-enduring-allure-of-choose-your-own-adventure-books*
2. Underserved refers to families meeting two of following criteria: low-income; first-generation; Black, LatinX, Indigenous (see Appendix for methodology)

A **healthy end-state** for the K-12 ecosystem is one where families have:

- Agency—and opportunity—to participate in several learning **experiences** each week across multiple sites
- Ability to prioritize the academic and personal **outcomes** that matter most to them
- Equitable access to **educational resources** (e.g., information, funding) within and around the K-12 system to pursue these experiences and outcomes

Figure A: Evolution towards a more student-centric K-12 education



There is significant room to explore all the various factors needed to catalyze this future; in ***Choose to Learn***, we focus on parent demand and discuss implications on public systems and suppliers. Specifically, we aim to:

- Map and define the landscape of K-12 offerings families can choose from
- Articulate families' aspirations and needs for their child's K-12 education
- Identify key issues the K-12 community must prioritize to build towards a more student-centric future

By establishing a baseline understanding of these topics, we encourage system leaders, suppliers, and advocates to pick up the mantle and explore ways to build towards a more student-centric future in K-12.

EXECUTIVE SUMMARY

- **On the heels of the COVID-19 pandemic, parents envision a more student-centric future.** As schools closed, parents gained more exposure to their child's K-12 experiences than ever before. Now, 52% indicate they prefer to direct and curate their child's education rather than rely on their local school system and 79% believe learning can and should happen everywhere (as opposed to in-school alone). As such, we believe it is incumbent upon K-12 policymakers, system leaders, and suppliers to introduce new experiences, choices, and outcomes into public school systems and catalyze growth of programs outside of it.

- **Broadly, there is significant, pent-up demand for new educational experiences.** Despite a recent claim in ***NY Times*** that parents are satisfied with K-12 schooling, our survey reveals the vast majority—more than 70%—are interested in new in- and out-of-school programs. Still, parents need information to act. Most of these families—while open-minded—report limited ability to pursue new offerings consistent with their values and needs.

- **Education does not fit neatly into a box.** K-12 parents are driven by a variety of educational aspirations that, in many cases, our current state fails to adequately deliver against:

  1. **Parents want a well-rounded education experience that delivers on academic promises as well as key personal growth outcomes.** In fact, when asked how they measure the effectiveness of an educational program, parents report that they value their child's happiness more than any other outcome. This highlights the need for K-12 stakeholders to integrate experiences that can spark passion and joy.

  2. **These priorities shift based on context—parents view "school" as the channel for academics and "out-of-school" as a way to pursue personal growth.** As such, our K-12 ecosystem must offer families both better school options and expanded access to out-of-school experiences, which has implications on policies related to school choice, credit-for-learning, and the provision of funds to families in need.

  3. **No matter the environment, parents desire tailor-made experiences reflective of their child's interests and needs.** Our research further reinforces parents' pronounced belief in student-centric experiences: learning that adapts to their child's interests, preferred schedule, and personal needs. Many features of student-centric environments are not hallmarks of our K-12 system. As such, K-12 policymakers and system leaders can evolve this model to provide more personalized learning in the classroom and a broader set of options outside of it.

- **Still, there is a disconnect between aspiration and reality.** Despite all parents reporting similar goals for their children, regardless of demographic, our data reveals gaps in participation across nearly all out-of-school programs relative to income and race. For example, children from underserved backgrounds are nearly two times less likely to participate in learning outside of school than their peers.

- **Bridging this gap requires greater collaboration across the K-12 ecosystem to provide families with more student-centric educational options, clearer and more comprehensive information, and financial resources:** Our research reveals three obstacles that may prevent K-12 families from participating in a full range of experiences across the K-12 ecosystem. An equitable K-12 ecosystem requires policy and infrastructure that can solve these problems, making students and parents co-creators of their educational journey.

    1. **Information is scarce, but valuable.** Across all income levels, parents are equally as likely to desire information to help them navigate the K-12 ecosystem as they are to seek direct financial support. The type of information parents value most is insight into their child's needs (asking, What *exactly* does my child need to flourish?), as well as information on a variety of programs to meet these needs. Unfortunately, despite 52% of parents wanting to direct their child's education, only one in four have sufficient knowledge to act. Providing families with clear and easily accessible information is critical to catalyze parents' broad aspirations into action.

    2. **"Choice" is a privilege.** Many parents—especially those from underserved backgrounds—make educational decisions based on *core needs* (e.g., cost, convenience, safety). Nevertheless, when asked to imagine the future—unrestricted by time and resources—parents' report aspirations for a more student-centric education. This underscores the importance of solving for parents' core needs; only then can all families elect to pursue educational experiences in line with their values and needs. Policies that make alternative school models and out-of-school learning more affordable and convenient (e.g., ESAs, charters, scholarships) are critical to catalyze a more equitable and student-centric K-12 ecosystem.

    3. **Supply is limited.** A healthy end-state requires an ample supply of alternative school options and out-of-school programs for families to choose from, but our current ecosystem has limited capacity to satisfy parent and students' needs. Among suppliers we spoke with, more than 80% report demand is meeting or exceeding expectations; in turn, they are hyper-focused on increasing capacity to serve more learners. Policies that provide K-12 suppliers with adequate funding to scale operations within (and around) the K-12 system is critical.

- **We have identified four key dynamics that require collective action to achieve a more student-centric future.** A healthy end-state where all K-12 families can achieve their educational aspirations regardless of life or economic circumstance is one with:

    1. **Availability** of student-centric educational offerings across the K-12 ecosystem
    2. **Awareness** of these offerings across all communities
    3. **Affordability** of experiences and reduction of out-of-pocket costs
    4. **Accessibility** of offerings that are convenient for all families

CALL TO ACTION

K-12 POLICYMAKERS AND SYSTEM LEADERS

- Enact policy that makes alternative school settings and/or out-of-school learning experiences more affordable for families who otherwise would not participate.
- Enact policy that incents districts to integrate more diverse learning pathways and environments into their model; involve families in co-design process to ensure relevance.
- Require state or local education agencies to work with community organizations and learning suppliers to develop a central database of in- and out-of-school programs.
- Establish norms to codify learning across multiple contexts; pilot frameworks that grant credit-for-learning outside of traditional school environments.

K-12 SUPPLIERS[3]

- Design school models and out-of-school programs that reflect parent demand for student-centric experiences and fill gaps across local communities.
- Explore ways to measure longer-term impact of student-centric education. For example, validate correlation between happiness and academic success.
- Form partnerships with K-12 districts to make student-centric experiences accessible within and around local public schools; involve families in co-design process.

FUNDERS AND ADVOCATES

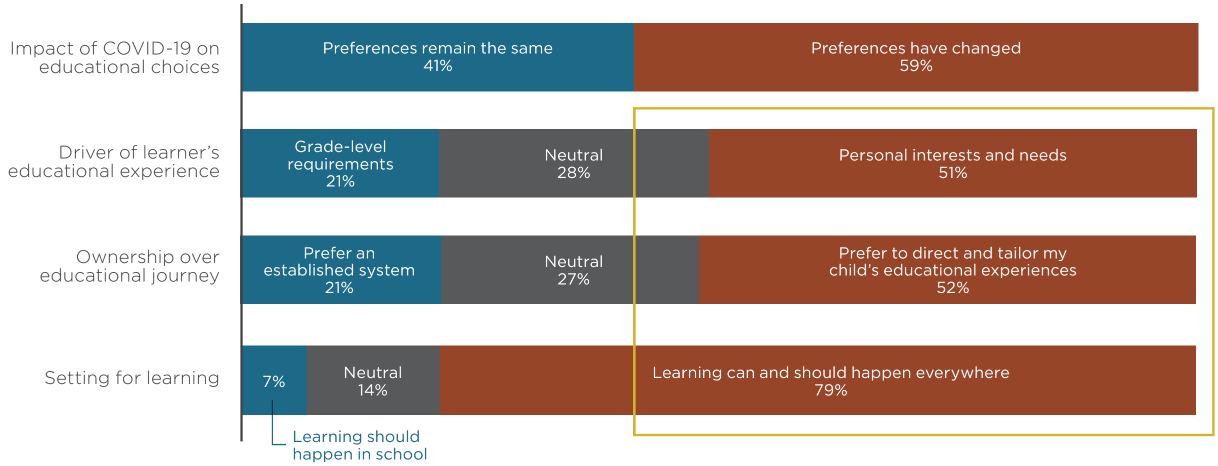
- Sponsor "facilitators" who work to build connections between community networks, K-12 districts, and suppliers to catalyze a more interconnected ecosystem.
- Identify K-12 suppliers that embody student-centric ethos and provide them with microgrants to help them effectively serve more learners.
- Conduct further research to validate longer-term impact of student-centric education; leverage research to advocate policy that promotes long-term access and sustainability.

3. K-12 suppliers refers to organizations that run alternative schools or providers of out-of-school programs

CURRENT STATE

Our research with K-12 parents and suppliers underscores this unique moment in time. Coming out of the pandemic, when most parents had more exposure to their child's education than ever before, many families have begun to reevaluate where and how their children learn. Most feel a greater sense of ownership over their child's K-12 education and believe learning can and should happen across all contexts—not just in school (Figure B).

Figure B: Parents' values and beliefs towards K-12 learning*



*Note: *Respondents were asked to rate their preferences and beliefs on a scale of 1 to 100; data was divided in groupings of 0-33, 34-66, 67-100 to indicate preferences*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

Altogether, this data suggests that post-pandemic, parents are seeking a **student-centric education experience** which, in several ways, may contrast with the traditional school model. As introduced in ***School Disrupted*** and expanded here to incorporate both of in- and out-of-school learning, our definition of student-centric education experiences include:

- Programming based on student interest and needs
- More flexible delivery sites and schedules
- Ownership over the combination of in- and out-of-school experiences that together comprise an education

As parents demand greater agency, it is incumbent upon the K-12 community to consider ways to introduce new experiences and outcomes into more traditional models.

WHAT IS THE LANDSCAPE OF K-12 OFFERINGS?

A primary goal of this work is to establish a common framework that will help us better understand the current landscape of options available to families. In service of this, we interviewed dozens of K-12 policy experts and suppliers to gather their perspective on the various types of educational organizations that serve students and families directly (or indirectly). By mapping the supplier landscape, we can more easily envision a K-12 ecosystem that is not based on exclusivity, but instead works in concert to provide families with a more student-centric collection of experiences.

A K-12 EDUCATION IS MORE THAN WHERE YOU GO TO SCHOOL

Our **K-12 landscape map** (Figure C) presents the network of education delivery sites and supporting "infrastructure" that comprise a child's education and helps us imagine a more student-centric future. Across this map, there are a wide variety of in- and out-of-school experiences, as well as the community networks and facilitators who help families navigate them (Figure C).[4]

In our current state, families participate in various combinations of learning experiences based on their circumstance and need. Some, such as local public school, are more established and can be relied on to safeguard equity. Others, such as virtual schools and learning pods, represent newer experiences that typically require families to opt-in or, in many cases, pursue independently from the local school system. Overall, a more student-centric future requires this variety—families must have agency to pursue the programs and outcomes that work best for them. For K-12 policymakers, system leaders, and other community actors, this requires a concerted effort to blend and connect these experiences in theory (e.g., better access to information) and practice (e.g., credit-for-learning outside of school or in alternative school environments).

Figure C: K-12 Landscape Map

Click here to view larger landscape map

*Notes: *Illustrative, not encompassing of the entire landscape of providers*

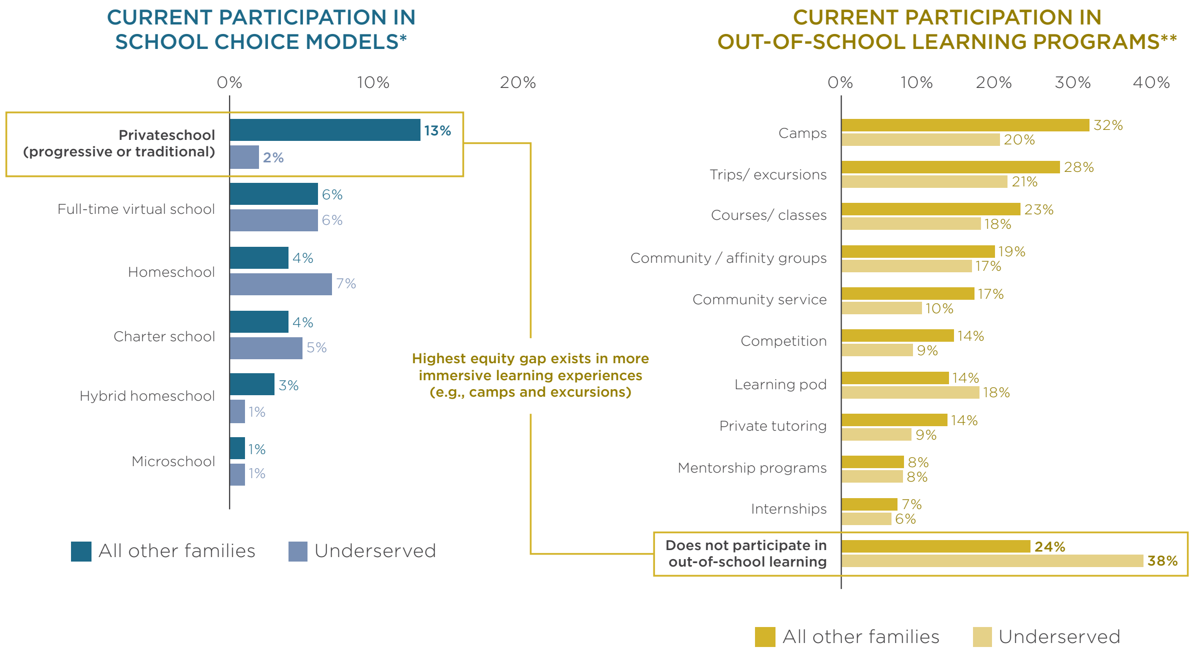
Sources: Company websites, Tyton Partners interviews and analysis

4. See Appendix for detailed taxonomy and definitions

PARTICIPATION RATES EXPOSE EQUITY GAPS

Families' level of involvement across this ecosystem varies based on income and race. According to the more than 3,000 parents we surveyed, children from underserved backgrounds are less likely than all other children to attend private schools, but more likely to homeschool or attend a charter school. Moreover, children from underserved backgrounds are far less likely than all other children to engage in learning beyond their typical school day: Nearly 40% indicate they do not participate in any "out-of-school" learning experiences.

Figure D: Current participation in- and out-of-school



*Notes: Reported local public school enrollment (AY21-22) is 77% (underserved) and 69% (all others); *Survey question "What type of school does your child attend?", n=3,115; **"Which of the following types of out-of-school programs does your child participate in? Please select all that apply.", answer choice "Other, please specify" excluded from analysis, n=3,115*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

This inequity underscores the need for K-12 policymakers, system leaders, and suppliers to focus on making programs more accessible through creative partnerships that integrate out-of-school experiences into schools, as Boston Public Schools' "Opportunity Portfolio" program aims to do.[5] Alternatively, policies that provide families directly with funds can empower them to pursue a broader range of learning experiences independently.

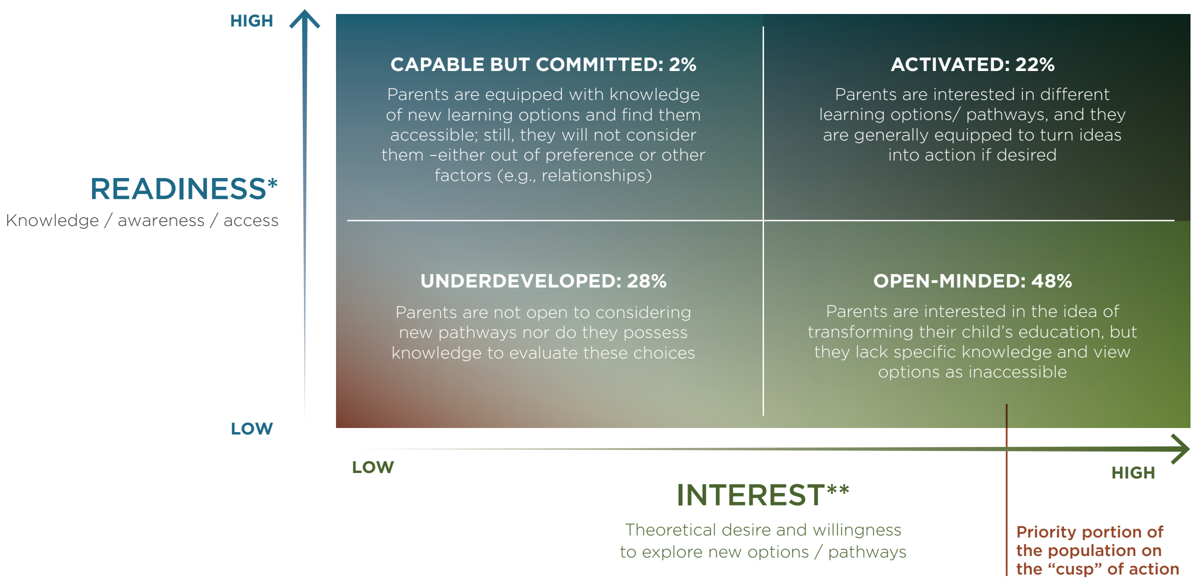
5. Boston Public Schools' "Opportunity Portfolio" approves local community organizations and enrichment programs to serve students in various capacities throughout the school year and grants funding to select partners: *https://www.bostonpublicschools.org/Page/7539*

HOW MUCH DEMAND IS THERE FOR NEW OFFERINGS AND WHAT ARE THE KEY DRIVERS?

THERE IS CONSIDERABLE DEMAND — IN THEORY

Considering the makeup of our current landscape—and parents' desire for greater ownership—it is no surprise parents express considerable interest in new and different K-12 experiences. In fact, more than 70% of parents are considering new school and/or out-of-school experiences for their children. Given the complexity of this ecosystem, however, we can square their high level of interest with what we refer to as a "readiness to act"—the extent to which parents have knowledge of new opportunities and consider them accessible (Figure E).

Figure E: Parent segmentation by magnitude of demand for new learning experiences



*Note: * Low readiness is flagged if either knowledge or access was rated below 4 (out of 5), and high readiness is flagged when both knowledge and access get a rating of 4 or above; "low/high scores" are then averaged across school models and out-of-school programs, respectively; for "overall readiness" to be high, ratings for school models and out-of-school programs must be above average at the same time; ** Low interest is flagged if a respondent is neither currently considering nor open to consider innovative school models*

Source: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

As it stands, 22% of families have both the desire and capacity to pursue new opportunities. We refer to this segment of K-12 families as **activated**—their current circumstances enable them to pursue opportunities consistent with their values and needs. These families require less support and direct intervention to achieve a student-centric education experience.

On the other hand, 48% of parents have the desire but lack the capacity to pursue new educational opportunities. We refer to this as the **open-minded** segment of the population—they can be considered "in the market" for a more student-centric experience but are not yet acting on this desire. Considered in aggregate, these parents express a clear bias towards enhancing their child's K-12 experience rather than a commitment to the status quo; for most, however, the path forward remains unclear. K-12 policymakers, system leaders, and suppliers should consider strategies to enable these "open-minded" families to access new experiences and outcomes within and around the K-12 system.

Demand also varies across specific program types, and unmet need is greatest as it relates to homeschool environments and mentorships or apprenticeships (Figure F).

Figure F: Demand analysis by program type

	LEARNING OPTION	OVERALL DEMAND % of families considering now / would consider in the future	"UNMET NEED" Difference between those considering option and current participation rates	"EQUITY GAP" Difference in participation rates between underserved families and all other families
SCHOOL	Homeschools*	44%	37%	+1%
SCHOOL	Virtual schools	31%	25%	0%
SCHOOL	Private schools	30%	19%	-11%
SCHOOL	Microschools	29%	28%	0%
SCHOOL	Charter schools	29%	25%	+1%
OUT-OF-SCHOOL	Immersion	56%	6%	-16%
OUT-OF-SCHOOL	Service learning	49%	28%	-7%
OUT-OF-SCHOOL	Mentorship / apprenticeship	37%	33%	0%
OUT-OF-SCHOOL	Courses / classes	38%	27%	-5%
OUT-OF-SCHOOL	Community / affinity groups	36%	27%	-2%
OUT-OF-SCHOOL	Private tutoring	29%	23%	-5%
OUT-OF-SCHOOL	Learning pod	28%	21%	+4%

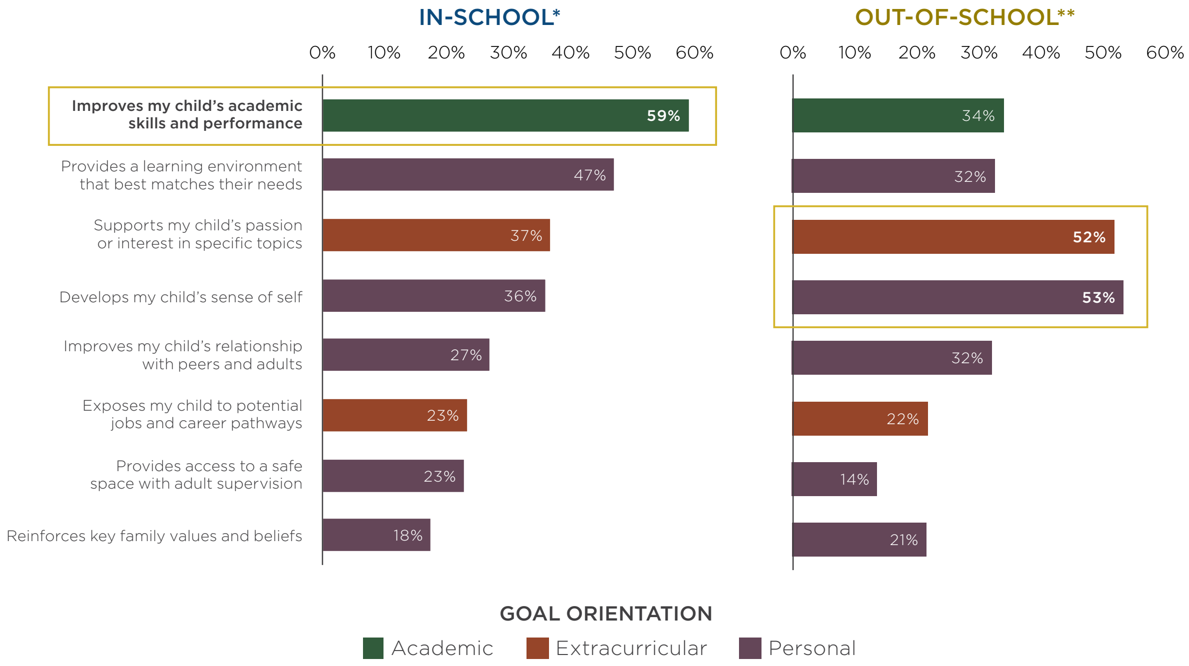
*Notes: *Any form of homeschool, including hybrid or multi-site models*
Sources: Tyton Partners K-12 Family Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

As defined in our study, **homeschool** is inclusive of both fully at-home or multi-site education, where a child splits time between school-based and home-based or community-based learning. More than 40% of parent would consider this option for their child in the future. Outside of school, parents are most interested in immersive experiences, such as excursions or camps, and service-learning opportunities. However, these experiences often cost more and require more of a time investment, resulting in the starkest equity gaps. Overall, demand is extensive—several offerings appeal to nearly one-third of parents—but the current system is unable to satisfy the needs of all families, especially those from underserved backgrounds.

PARENTS WANT A WELL-ROUNDED EDUCATION

Parents expect their child's education to deliver on a range of outcomes, including academic success, extracurricular passion, and broader self-fulfillment. Notably, these aspirations vary by context: Most parents cite academic achievement as their greatest aspiration for their child's school-based education (59%), while outside of school, parents aspire for their children to develop passion towards a specific subject (52%) and cultivate a stronger sense of self (53%).

Figure G: Top aspirations for child's education



*Notes: *Survey question: "What are your top goals for your child's education? I am most concerned with an education that (select up to three)…", Option "Other, please specify" excluded; **"What do you most want your child's out-of-school learning experiences to achieve? I want the out-of-school learning experiences to (select up to three)…", Option "Other, please specify" excluded, n=3,115*

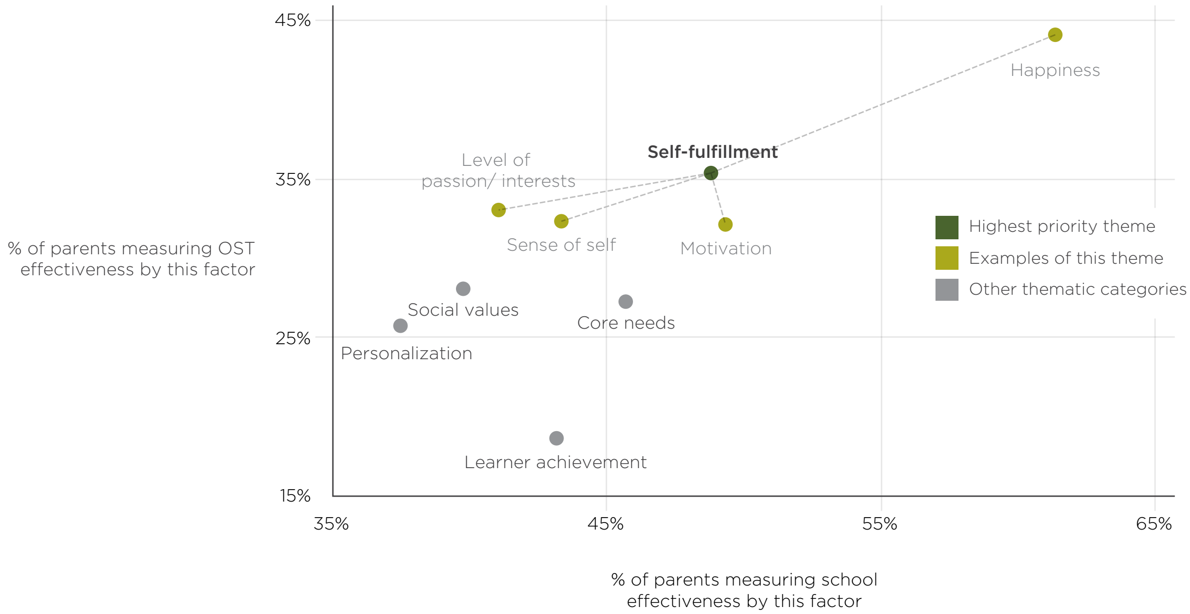
Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

But why do these outcomes need to occur in separate settings? Our work reveals that parents' attitudes reflect the limitations of our current K-12 ecosystem—namely, the tradition of school as a place of routine standardization, and not necessarily a place where children are free to explore and develop their interests. Given this dynamic, families who do not have the means to pursue out-of-school experiences may struggle to provide their child(ren) with the well-rounded education they desire. As such, a more student-centric K-12 ecosystem is one that fosters a stronger union of academic, extracurricular, and personal outcomes *within* a school environment and *in tandem* with out-of-school experiences.

Interestingly, despite the importance of academics, non-academic outcomes drive perceptions of quality across all environments. To explore this, we asked parents how they measure the overall efficacy of their child's education and grouped their responses into five key themes.[6] As it turns out, parents prioritize their child's happiness over any other outcome. What this tells us is striking: While parents have several expectations for their child's education, ultimately its impact on their child's emotional state—their happiness—is what matters most.

6. See Appendix for definitions and methodology

Figure H: How parents measure the effectiveness* of in- and out-of-school experiences



*Notes: Scale for x-axis has been adjusted for visibility; *Survey questions: "How do you measure the effectiveness of your child's current school experience? Please select all that apply. My child's…" , "How do you measure the effectiveness of the program? Please select all that apply.", answer choice "Other, please specify" excluded from analysis, n=1,482*

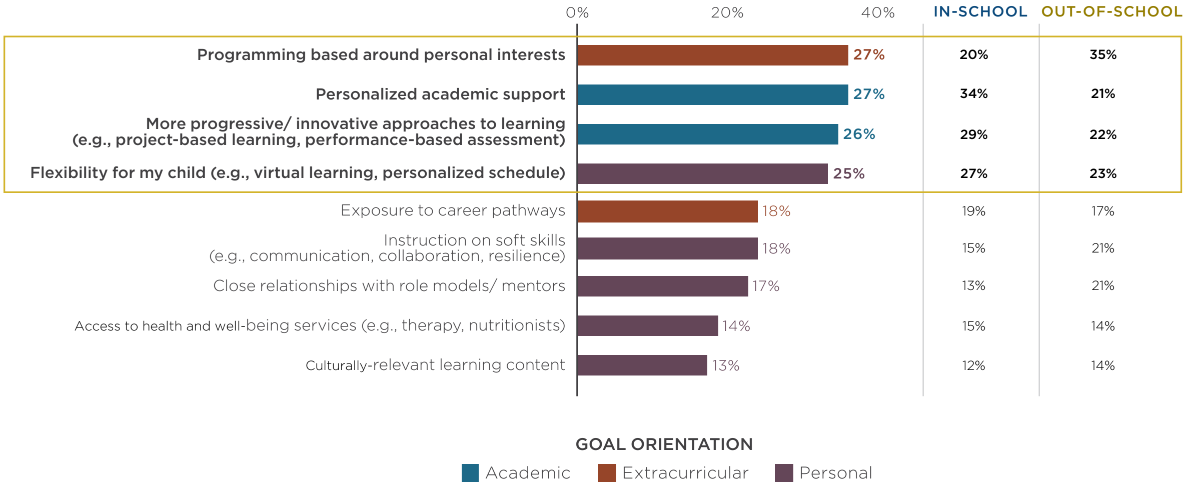
Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

Given the contrast between in- and out-of-school experiences in our current state, it is unlikely for a family to achieve all these outcomes—academic achievement, personal interests, happiness—in one environment. Moreover, the opportunity to participate in learning across separate environments is not a universal feature of our current system. Authorizing student-centric programs, such as multi-site pathways for in-district families, can help the K-12 ecosystem evolve to be more symbiotic with family need.

PARENTS CRAVE TAILOR-MADE LEARNING EXPERIENCES FOR THEIR CHILD

When examining the features of learning most attractive to parents, the common throughline is a more personalized education. For parents, this often means innovative learning methods that match their child's needs and programming that supports their specific interests. Programs that can provide personalized academic supports and interest-based curriculum will deliver greater value to families than those based on routine and standards.

Figure I: Program features valued by parents (top 2)



*Notes: Survey questions: *"Which of the following would you value the most if you were to consider alternative school options for your child? Please select up to two", **"Which of the following features do you value the most when exploring out-of-school programs for your child? Please select up to two.", answer choices "Other, please specify" excluded, n=1,482; ^Average rank is calculated across these two survey questions*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

As such, K-12 schools and districts should consider ways to integrate more individual academic supports within the classroom and provide greater access to enrichment opportunities for children to pursue outside of it. Consider Rhode Island's "All Course Network,[7]" which offers a variety of interest-based pathways to students as part of the district model, including internships, arts courses, and dual enrollment.

Moreover, alternative school and out-of-school program suppliers should highlight student-centric features in community outreach efforts to catalyze interest and drive enrollment. Leaders at The Forest School, a microschool in Atlanta, partner with local churches and community leaders to spread information about the school's interest-based curriculum and personalized academic supports to families from underserved communities. The school now operates at full capacity and more than one-third of its students are from low-income families.[8]

> *"Each community has different needs and requires custom programming. **We work with parents to set the enrichment agenda** and develop a shared set of values and goals." – Director, Microschool, Atlanta, GA*

> *"If school is about rigid routine, we want to be a foil: choice and freedom guide everything we do." – Executive Director, out-of-school enrichment chain*

7. Rhode Island State Department of Education's "All Course Network" provides families the option to participate in enrichment courses (e.g., arts), work-based learning, and other supplemental experiences for credit: *https://www.ride.ri.gov/StudentsFamilies/EducationPrograms/AllCourseNetwork.aspx*
8. Tyton Partners visited The Forest School and interviewed leadership as part of this research; *https://theforest.school*

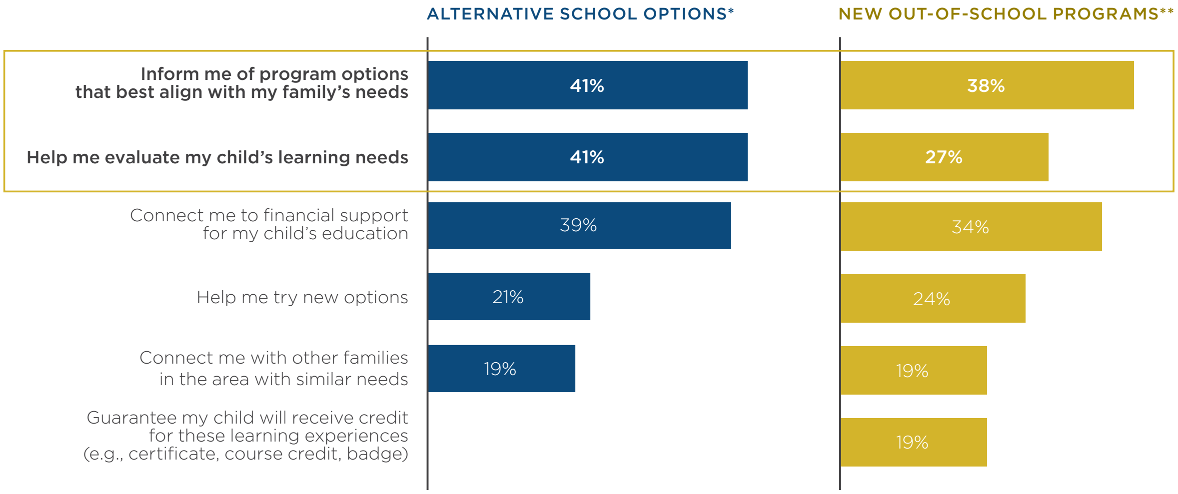
WHAT BARRIERS DO WE NEED TO CONTEND WITH?

Parents aspire for a more student-centric experience, but many struggle to achieve this in the current K-12 environment. Our research points to three obstacles that may prevent families from living out their educational goals.

INFORMATION IS SCARCE, BUT EXTREMELY VALUABLE

According to our study, parents crave two types of knowledge: (1) information on their child's specific learning needs and (2) educational programs available to meet these needs. Notably, parents are equally likely to desire information about their child's needs as they are direct financial support when considering resources that would enable them to pursue new in-school and/or out-of-school options; this finding is consistent across all income brackets (Figure J).

Figure J: Resources that will catalyze participate in new K-12 learning environments



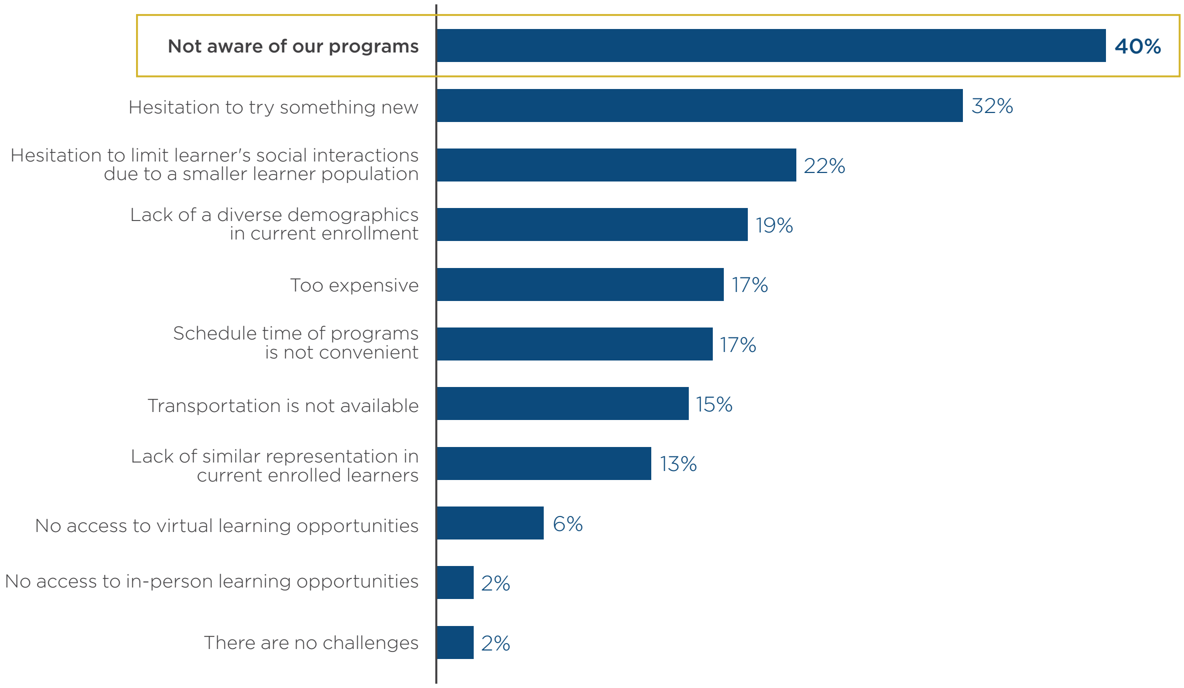
*Notes: *Survey question: "Which of the following would make you likely to enroll in alternative school options for your child? Please select up to two. Resources that...", answer choices "Other, please specify" and "None of the above" excluded from analysis, n=1,482; ** "Which of the following would make you most likely to enroll your child in new out-of-school programs? Please select up to two. Resources that...", answer choice "Other, please specify" excluded from analysis, n=1,482; ^ Answer choice not presented for alternative school options*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

> *"We complete an intake interview with potential families to thoroughly discuss the **needs and goals** for their family and **address ways we can help them meet those goals.**" – Director, Learning/community hub, Atlanta, GA*

Unfortunately, only a small segment of parents interested in new experiences report they feel they have sufficient knowledge to act. This lack of information is especially significant given the high correlation between knowledge and interest: Nearly all parents who report sufficient knowledge of new educational experiences are also considering them (See Figure D matrix). Suppliers recognize this gap, too. Among those we surveyed, 40% believe a lack of awareness is the number one reason why families from underserved backgrounds do not participate in their program (Figure K).

Figure K: Challenges preventing under-represented families from participating in suppliers' program*



*Note: *In the survey, 'historically under-represented populations' included but were not limited to low-income households, low-education attainment households, and families from Black, Indigenous, and/or Hispanic/Latinx backgrounds; **Survey question: "What challenges might prevent under-represented families and learners from participating in your program? Please select the two answers that best describe the challenges.", answer choices "Other, please specify" excluded from analysis, n=139;*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Supplier Survey 2022, Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners interviews & analysis

> *"We provide an amazing service, but are a very small operation, so **we have not had enough time and resources to adequately spread the word** across the vast homeschool community about our existence and what we offer."*

> *"I travel in the community, speaking to parents and children about what we do. **I do interactive programs for them to show them how engaged their child can be in our activities.**"*

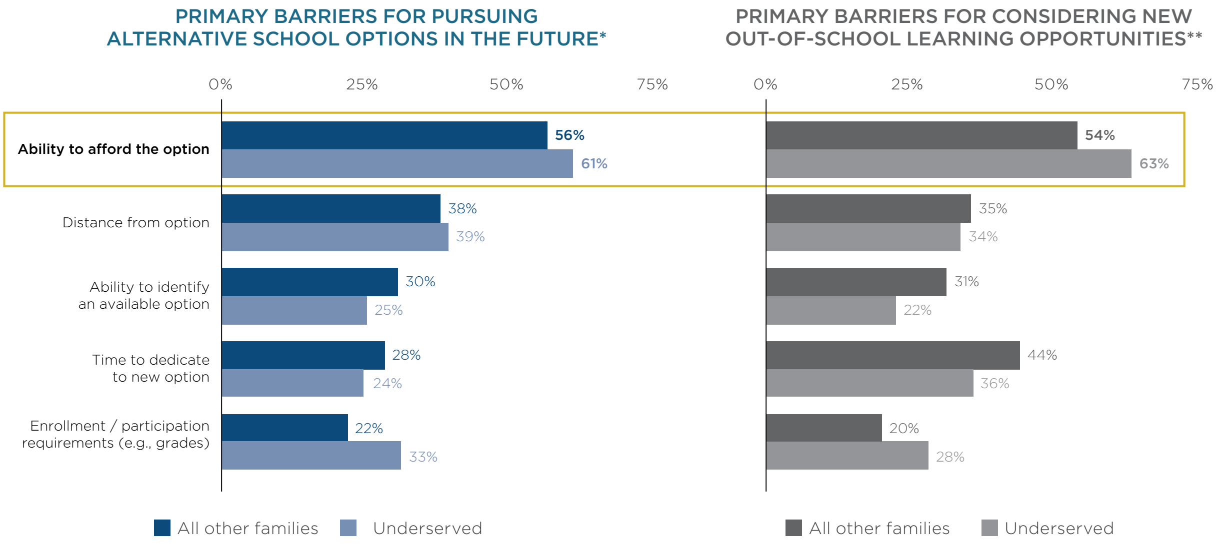
Given only 29% of suppliers surveyed are leveraging the public school system to connect with families, an opportunity exists to create a stronger union between various corners of the K-12 ecosystem to increase exposure and catalyze interest into action. One option for state and local communities may be to develop online databases and other hands-on supports so families have the information they need to navigate their options and "direct" their child's K-12 education. At the state level, RESCHOOL Colorado[9] is one example of a coalition that has leveraged its online platform to help families discover and enroll in a variety of student-centric educational offerings.

9. Tyton Partners interviewed leaders from RESCHOOL Colorado as part of this research: *https://www.reschoolcolorado.org*

CHOICE REMAINS A PRIVILEGE

Despite their broader aspirations, many families—especially those from underserved backgrounds—make educational decisions based on what we refer to as their core needs: cost, convenience, and safety. More than half of the parents we surveyed report their "ability to afford an option" is the top barrier to pursuing new educational opportunities, followed by distance from available options (Figure L). Given the pressing nature of this issue, K-12 policymakers, system leaders, and suppliers can each take steps to ensure student-centric educational offerings are more affordable and convenient for families.

Figure L: K-12 family barriers to new learning experiences



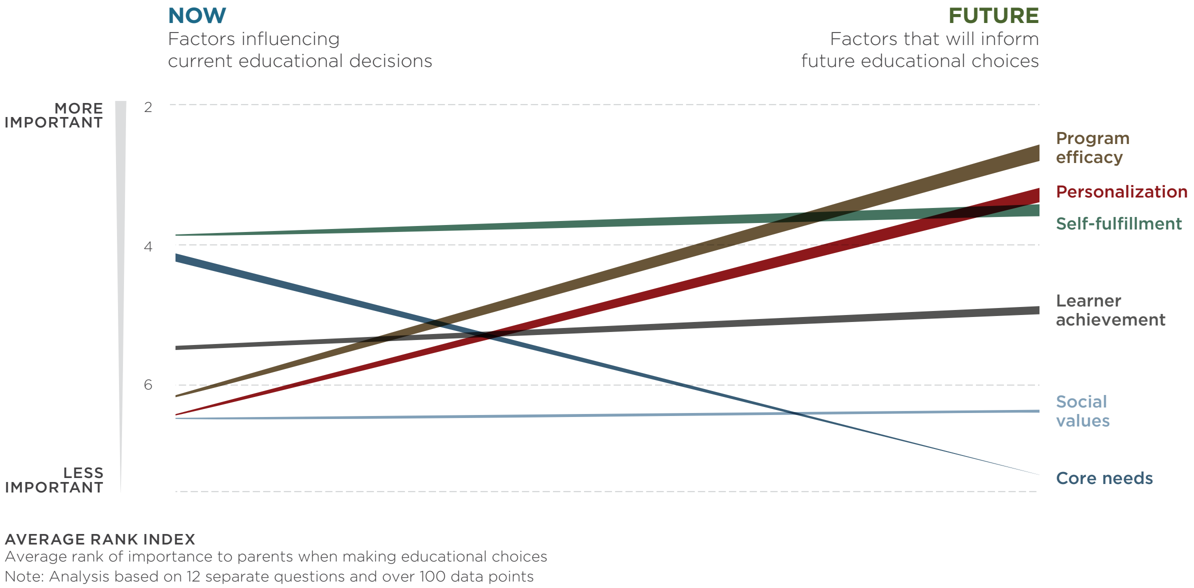
*Notes: *Survey question "You indicated your family's ability to enroll your child in the school options you are considering/ would consider is low, what do you see as barriers? Please select all that apply.", "Other, please specify" excluded from analysis, n=1,610; **"You indicated your family's ability to enroll your child in the out-of-school program options you are considering/ would consider is low, what do you see as barriers? Please select all that apply.", "Other, please specify" excluded from analysis, n=1,082*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

What would happen if families could transcend their concerns about cost and convenience? To explore this question, we analyzed patterns in parent responses across time and circumstance. When asked about their current environment—why their child attends his or her current school, why their child does or does not participate in out-of-school learning—core needs are unsurprisingly a primary factor that influences parents' decisions. When asked to consider the future—what do they desire out of their child's education, what would cause them to switch—core needs were a non-factor. Rather, parents are motivated to make decisions based on a program's overall effectiveness, level of personalization, and the potential for their child to feel fulfilled (Figure M).

*"**If you have money and resources, you can access that whole world of options.** If you don't, it's a different story." – Director, Community Learning Hub, CO*

Figure M: Key factors influencing parents' educational choices, now and in the future



Note: Chart represents an index of relative importance for key decision-making themes over time. Index is based on over 100 data points across 12 distinct questions related to current and future drivers of education decision-making. Index reflects the average rank of importance for answer choices connected to each theme

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

The takeaway is clear: the current K-12 environment limits parents' ability to make choices based on their values and needs. Many are forced to rely on the most cost-effective and convenient choices, regardless of their overall quality and general alignment to what they aspire towards. If we aim to provide a more student-centric future—one where families can exercise greater ownership over their educational experiences and outcomes—K-12 policymakers, system leaders, and suppliers must work to ensure families have the resources they need to access a wider variety of opportunities.

One example of an alternative school model that aims to solve for this is Black Mothers Forum, a tuition-free microschool that provides a personalized educational experience for Arizona's Black families. Founders of the Black Mothers Forum have partnered with Prenda, an online curriculum platform with charter-school status, to eliminate out-of-pocket costs for families. Creating partnerships that connect K-12 systems with alternative learning pathways are one option to reduce financial barriers for families who otherwise have limited choices.[10]

10. Tyton Partners interviewed leaders from both Black Mothers Forum and Prenda as part of this research; *https://crpe.org/wp-content/uploads/final-Black-Mothers-Forum-case-study.pdf*

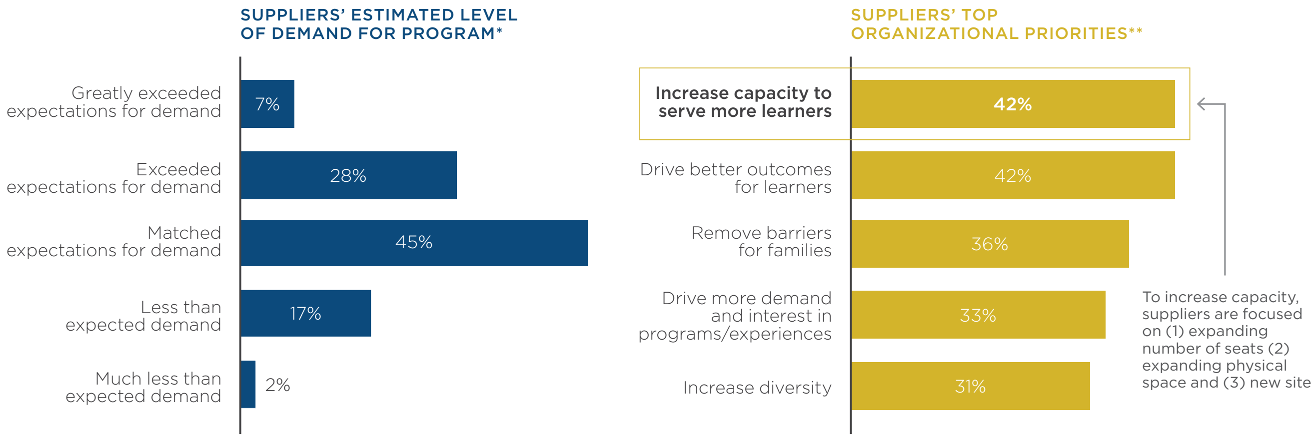
SUPPLY IS LIMITED

A healthy ecosystem requires an ample supply of options for families to choose from. However, as it stands, many suppliers report limited capacity prevents them from serving all families interested in their programs. Part of this is by design: student-centric programs often require smaller class sizes to enable higher-touch relationships with staff.

Another driver of limited supply is simply the level of demand, which is substantial and can lead to long wait-lists. Among the in- and out-of-school suppliers we surveyed, more than 80% report parent demand is meeting or exceeding expectations. Moreover, 42% report their top organizational priority is "increasing capacity to serve more learners"—a goal that sits side-by-side with "driving better learner outcomes" as their most critical area of focus (Figure N).

> *"Our program is small by design; our middle and high schoolers pursue their own passion projects and collaborate intimately with staff. This unfortunately results in a long wait list and too many families disappointed families" – Executive Director, Microschool, Denver, CO*

Figure N: Suppler perspective on demand and key priorities



*Notes: *Survey question: "How would you characterize level of demand for your program relative to your expectations this year?", n=139; **Survey question: "What are the most urgent priorities for your organization over the next three years? Please select your top two priorities.", n=132; answer choices "Other, please specify" and "I don't know" excluded from analysis*

Sources: Tyton Partners K-12 Family Choice Ecosystem Supplier Survey 2022; Tyton Partners interviews & analysis

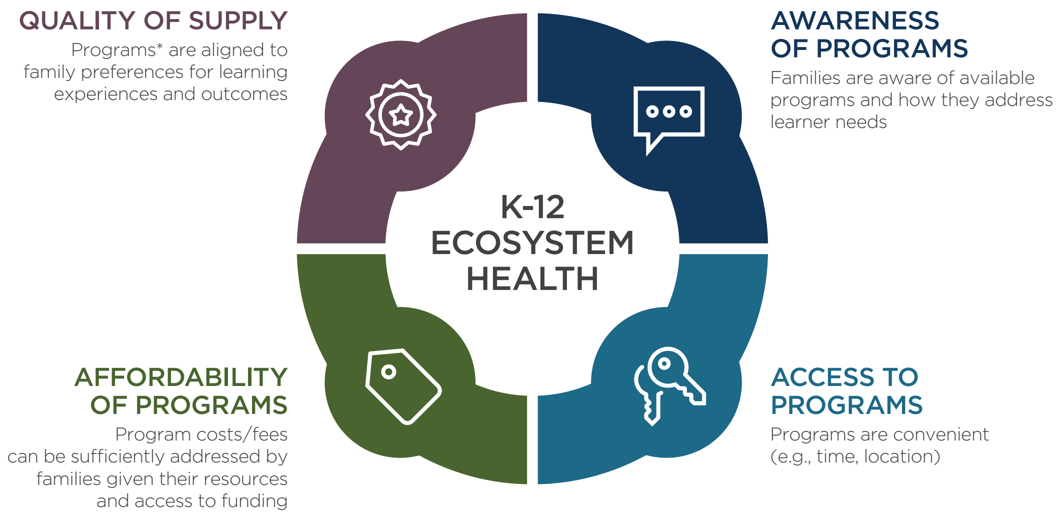
Recognizing the need for families to be able to access more in- and out-of-school options, K-12 suppliers should consider expanding their number of sites and seek ways to partner with K-12 public schools and districts to access facilities and resources. Funders can play their part by providing microgrants directly to high-quality programs so they can invest in capacity-building efforts, similar to how VELA Education Fund catalyzes growth and connectivity across its network of community-driven education models.[11]

11. VELA Education fund offers variety of grant opportunities, from $2,500-$10,000 microgrants to early-stage entrepreneurs to $100,000-$250,000 "bridge" grants to help scale broader adoption. Tyton Partners interviewed leaders as part of this research. *https://velaedfund.org*

A MORE DYNAMIC AND EQUITABLE FUTURE

Considering these research findings in their entirety helps us envision more clearly what it will take to achieve a healthier end-state. We can identify the dynamics and interventions the K-12 community can coalesce around to build towards a more student-centric K-12 ecosystem—one that sustains strong awareness around accessible and affordable educational offerings aligned to family needs.

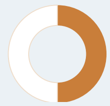
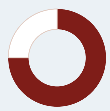
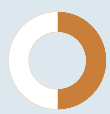
Figure O: K-12 ecosystem health framework



*Note: *"Program" refers to an educational offering outside of the public school system in this document*

In its current state, our K-12 ecosystem has several gaps relative to a more ideal end-state. To evaluate the interventions necessary to build towards a more ideal end-state, we explored the following concepts:

- **Dynamic** refers to a condition—i.e., availability, awareness, affordability, accessibility—necessary for a healthy K-12 ecosystem
- **Market gap** refers to the extent to which each dynamic poses a barrier to a healthier end-state

DYNAMIC	MARKET GAP	SELECTED FINDINGS THAT SUPPORT EVALUATION
Availability	 Moderate	• Families have a wide range of preferences and needs. Generally, the alternative school models and out-of-school programs we evaluated align with families' preferences for student-centric environments and diverse range of academic and non-academic outcomes. • However, the overall supply of learning environments that unify these outcomes is limited. Parents report limited ability to discover and enroll in student-centric environments. Moreover, many suppliers struggle to meet demand, and increasing capacity is their top organizational priority.
Awareness	 Significant	• Nearly half of parents lack the information needed to pursue a better K-12 education for their child. For example, 48% are open-minded about new offerings but report limited knowledge as to where they can enroll. • Suppliers recognize the severity of this gap, too, citing "limited awareness" as the core reason underserved families may not participate in their program.
Affordability	 Significant	• Affordability is the most significant market gap—most families must pay out-of-pocket for alternative school and out-of-school offerings, and parents cite their "ability to afford a program" as the number one barrier preventing them from enrolling their child in any K-12 environment. • While cost is a significant factor to parents, suppliers are less focused on reducing out-of-pocket costs relative to other organizational priorities, which accentuates the need for intervention from policymakers and philanthropists.
Accessibility	 Moderate	• Families too often have to make immediate educational choices based on "core needs" such as cost and convenience. Underserved families are more likely to be influenced by these factors and cite time and distance as key barriers to enrollment. • Expansion to new sites is a key priority for many of the suppliers we spoke with, but few report the capacity to do so as it stands.

CONSIDERING A PATH FORWARD

We recognize these broad indicators are the tip of the iceberg; building towards a more student-centric K-12 ecosystem requires a broad coalition focused. Nevertheless, as we examine the K-12 ecosystem with a broad lens—and center parent voices—several key steps emerge to highlight how the K-12 community can work together to jumpstart progress.

Availability: ***To increase the supply of high-quality offerings…***

- *Policymakers and system leaders* can develop policy and infrastructure necessary for portable student records. Creating favorable regulatory conditions for "anytime, anywhere" learning can stimulate investment and growth in supply of student-centric experiences
- *Suppliers* of student-centric programs can increase capacity to serve more learners by selecting new sites for expansion and recruiting staff necessary to grow
- *Funders* can provide direct financial support to selected programs that meet predetermined criteria for student-centric education and demonstrable achievement of key student and family goals

Awareness: ***To inform more families about learning options and outcomes…***

- *Policymakers and system leaders* can develop online platforms and provide hands-on guidance for families to navigate their local K-12 ecosystem
- *Suppliers* can prioritize community outreach and collaborate with local community leaders to catalyze interest among K-12 families
- *Funders* can sponsor the growth of facilitator networks and other community organizations that offer hands-on navigation support to families (e.g., guides)

Affordability: ***To make high-quality offerings more cost-effective…***

- *Policymakers and system leaders* can enact policy that put funds directly in the hands of families who need them (e.g., ESAs and other microgrants)
- *Suppliers* can explore creative partnerships with K-12 schools and districts to deliver student-centric experiences across multiple sites at no cost to families
- *Funders* can provide direct financial support to student-centric educational providers so they can pool scholarships for families who otherwise cannot afford programs

Accessibility: ***To make student-centric experiences and outcomes more convenient…***

- *Policymakers and system leaders* can establish partnerships between districts and virtual course providers to enable access to a broader array of subjects and enrichment areas
- *Suppliers* can (1) provide transportation assistance or reduce transportation burden by offering hybrid or fully virtual options or (2) improve scheduling flexibility by offering customizable hour and/or day options
- *Funders* can assist suppliers with capacity-building efforts to expand transportation services and provide digital infrastructure necessary for online pathways

APPENDIX

RESEARCH OVERVIEW

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

- **External interviews ›** Spoke with leaders across the K-12 ecosystem, including program operators, policy experts, and researchers to validate understanding of K-12 landscape and develop perspective on key ecosystem dynamics
- **Parent survey ›** Fielded a large-scale survey generating feedback from more than 3,000 U.S. parents with at least one child enrolled in K-12 to develop an understanding of key demand dynamics
- **Supplier survey ›** Gathered input from nearly 150 organizational leaders who have decision-making authority across a wide array of in- and out-of-school educational offerings

ADVISORY BOARD

Tyton Partners hosted virtual workshops with advisory board members at selected points between April and July to review key themes and hypotheses regarding K-12 family needs and share perspective on the primary research findings. Advisors participated as valuable thought partners, but their involvement in this work does not signal an endorsement of the recommendations.

We would like to thank:

- **Derrell Bradford,** President, 50CAN
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- **Meredith Olson,** President, VELA Education Fund
- **Ali Picucci,** Senior Fellow, Transcend Education
- **Kimberly Robinson,** Executive VP, Forum
- **Beth Seling,** Chief Operating Officer, VELA Education Fund
- **Juliet Squire,** Partner, Bellwether Education Partners
- **Kelly Smith,** Founder and CEO, Prenda

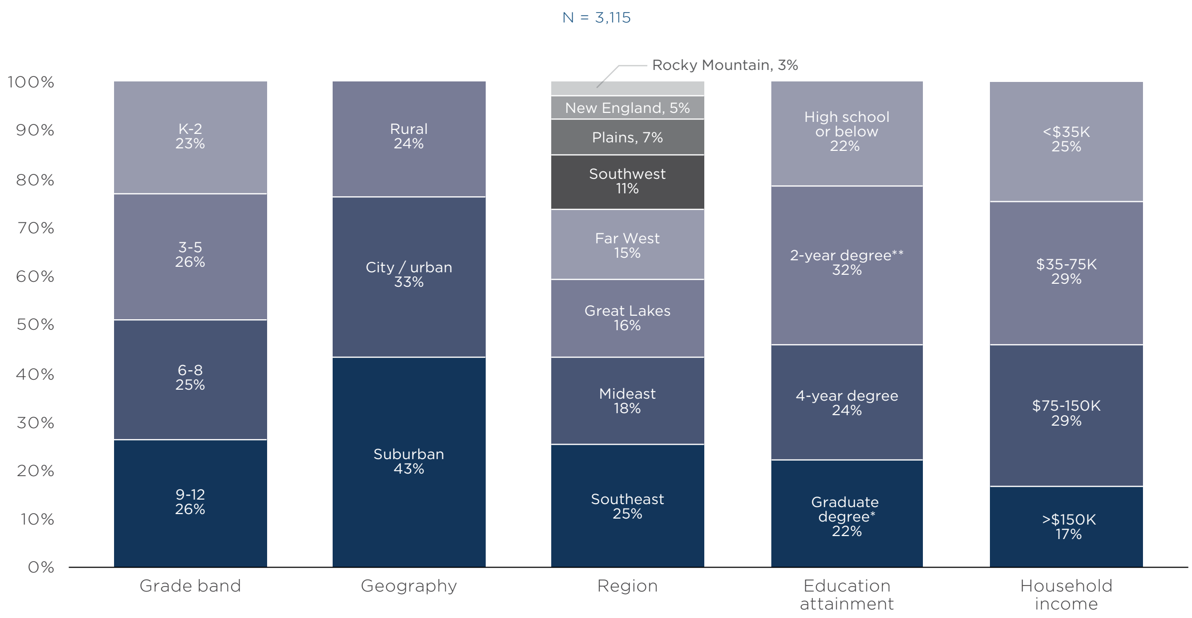
SURVEY METHODOLOGY

Tyton Partners conducted extensive research to collect data on parents' attitudes and beliefs towards K-12 education and the ecosystem of options available to support it. Our primary research, conducted throughout May and June 2022, includes a survey of more than 3,000 K-12 parents and an interview campaign and survey of nearly 150 suppliers.

K-12 PARENT SURVEY

Parents are core influencers 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 U.S. demographics.

Figure P: K-12 parent survey demographics*



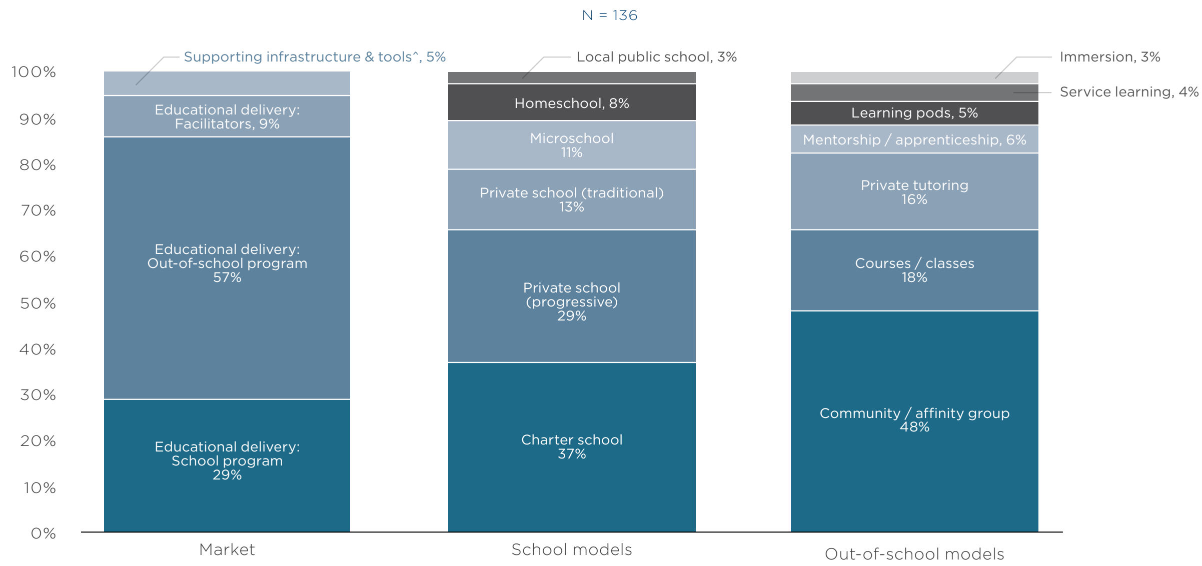
*Notes: *Refers to any graduate coursework and/or graduate degree; **Refers to some college coursework, 2-year degree, or certificate*

Sources: U.S. Bureau of Economic Analysis, Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

K-12 SUPPLIER SURVEY

A survey of nearly 150 organizational leaders allowed for deeper investigation into the practices K-12 programs employ—both in- and out-of-school—to meet parent demand. These leaders and entrepreneurs have proximity to parents and work directly with students.

Figure Q: K-12 supplier survey demographics*

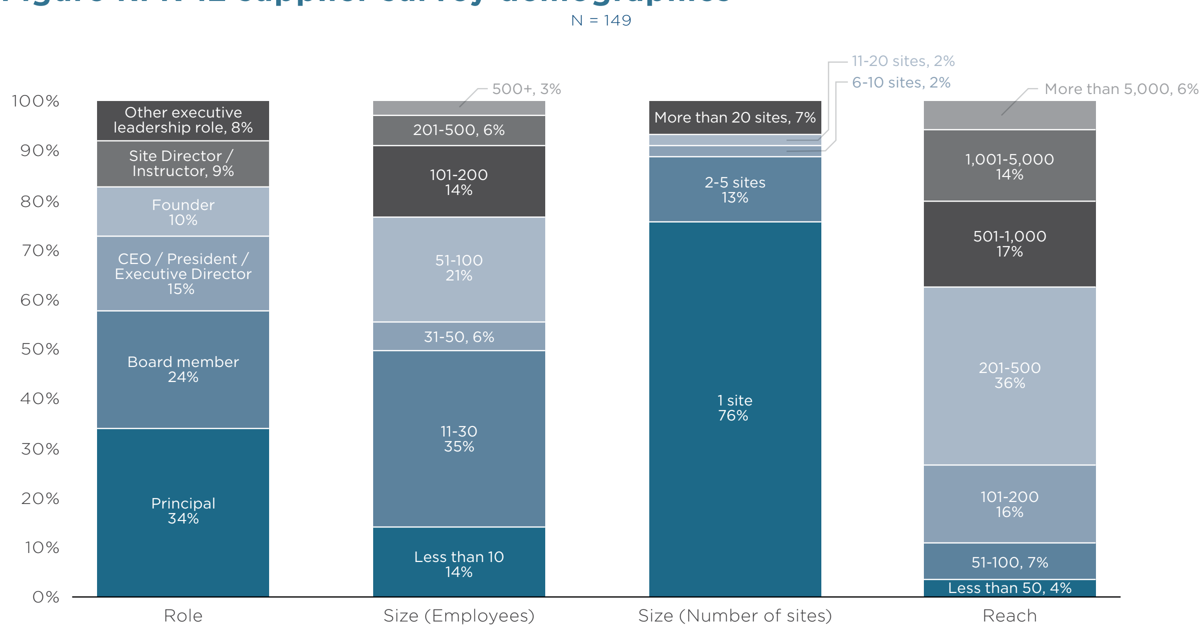


*Notes: *Survey questions: "Please indicate where you would place your organization's "primary offering" within the taxonomy"; **"Infrastructure & tools" include <10 "program operations and management" providers and "program discovery platform" providers; ^"Intermediaries" include community learning hubs (58%), homeschool co-ops (25%) and community networks (17%)*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Supplier Survey 2022, Tyton Partners analysis

All suppliers participating in our survey are key decision-makers in their organization's program strategy and operations. Note that while this sample allowed us to gather directional feedback to sharpen working hypotheses, this data is not conclusive, nor does it reflect a nationally representative sample. Moreover, it skews towards more "innovative" educational offerings—e.g., microschools, learning pods—and excludes public school administrators.

Figure R: K-12 supplier survey demographics*



*Note:*Survey questions: "How would you describe your primary role at your organization?", "How many full-time employees are there at your organization?"," How many learners does your organization serve over the course of an academic year? (Please use the most recent academic year or program cycle)", answer choice "I don't' know" and "Other please specify" excluded*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Supplier Survey 2022, Tyton Partners analysis

SEGMENTATION ANALYSIS

To best understand the dynamics underpinning K-12 family aspirations and needs, Tyton created two primary respondent subgroups:

- **Families from underserved backgrounds** are defined as those who indicated at least two of the following attributes: low-income; Black, Latinx, Indigenous; first-generation.
- **Local public-school families** include parents whose child participates in the local K-12 school option in a traditional on-premise setting; **all other** respondents have a child who participates in any of the following school settings: full-time, non-pandemic virtual public schooling, hybrid homeschooling (i.e., part-time participation in a traditional school, part-time homeschooling), homeschools, microschools, private schools, or charter schools.

Figure S: Overview of segment-level analysis

CATEGORY	SEGMENTATION PERFORMED IN PRELIMINARY ANALYSIS		PRIMARY SEGMENTATION
Family background	• Household income • Highest level of parent educational attainment • Race • Region	›	• Underserved as defined by meeting two of the following criteria: • Low-income • Black, LatinX, Indigenous • First-generation
Learner context	• Grade-band • Academic performance relative to state standards • School type	›	• School type • Local public school • All other (i.e., "school choice")

*Note: *Including traditional private school, virtual school, homeschool (hybrid included), charter school, and microschool; can be further segmented in additional analyses*

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022; Tyton Partners analysis

PARENT DEMAND ANALYSIS

Several findings referenced in the report resulted from analyzing patterns of demand over time. To perform this analysis, the Tyton Partners team bucketed selected responses into a series of themes, defined below:

Figure T: Parent demand categories at the intersection of "school" and "out-of-school"

CATEGORY	DEFINITION	EXAMPLE SURVEY ANSWER CHOICES
Core needs	Primary conditions that are prerequisite for any learning environment (e.g., time, resources)	• Affordability/ cost • Convenience • Safe environment • Wellbeing services
Learner achievement	Satisfaction of grade-level competencies and preparedness/ relevance to future goals (i.e., career, college)	• College/ career readiness • Exposure to career pathways • Meeting academic needs
Personalization	Structural, programmatic elements centered on the learner's internal and external needs, such as learning needs and schedule	• Pedagogies specifically tailored to learner's needs • Flexibility for learner • Programming/ alignment to interests
Program efficacy	Demonstrable credibility and quality of learning experiences and/ or environment	• Effective use of learning technologies • Innovative instructional methods (e.g., project-based) • Instructor quality
Self-fulfillment	Dedication towards reaching one's potential and the positive feelings associated with it	• Happiness • Motivation • Sense of self
Social values	Interpersonal skills broadly and with learner's surrounding community	• Community • Cultural relevance • Relationships • Soft- skills

Sources: Tyton Partners K-12 Family and Learner Choice Ecosystem Parent Survey 2022, Tyton Partners analysis

Survey questions across the study were also tagged "current" or "future", depending on the content and context of the question. Questions that relate to key decision-making criteria for current education offerings were set as "current." Questions that emphasized broader goals and/or aspirations, areas of improvement, and hypothetical future choices (e.g., "Which of the following would cause you to switch?") were grouped into the "future" category.

Within the broader "current" and "future" segments, each thematic grouping of answers was ranked by the frequency with which various answer choices connected to each theme appeared at a high frequency (the amount that each type of answer came up across all related questions). For example, if "cost" and "convenience" were selected at high frequency across a number of questions, "core needs" would have a higher importance relative to other themes.

With this method, we can see what parents broadly prioritize now and what they seek to achieve more broadly in the future.

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
- **Family choice:** the opportunity for students and families to choose to participate in educational programs/offerings that replace or extend the traditional K-12 public school experience
- **Learning experiences:** instructor-led academic or non-academic programs that occur in a variety of settings or environments
- **Learning outcomes:** the ways in which learning experiences can impact student participants now (e.g., skills, character development) and in the future (e.g., access to opportunity)
- **Student-centric:** experiences and outcomes that reflect students' priorities, interests, and needs; this may be applied to a students' overall K-12 education (i.e., pursuing pathways that meet family needs) as well as the specific experiences that comprise that education (i.e., personalized classroom activities, flexible education)
- **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

MARKET LANDSCAPE TAXONOMY

As discussed in the report, our concept of the K-12 ecosystem covers a broad array of education delivery models and supporting infrastructure. Collectively, this map represents the variety of options families may consider as part of their K-12 journey and the various actors that may be necessary to enable it. Here, we define the various "markets" that underpin each corner ecosystem as well as the specific program types referenced throughout the report.

Our hope is that future research efforts can build on this landscape map to further explore the areas of intersection and connection necessary for a more student-centric ecosystem in the future.

Figure U: FLC market landscape taxonomy

<table>
<tr><th>SOLUTION</th><th>MARKETS</th><th colspan="7">SEGMENTS</th></tr>
<tr><td rowspan="6">Education delivery
Providers that deliver learning Programs to children that are facilitated and/or delivered by an instructor, coach, or mentor</td><td rowspan="2">School model
Program a learner participates in with majority of learning time and/or awards majority of credit; includes both in- and out-of-system Models</td><td>Local Public schools</td><td>Charter schools</td><td>Private (traditional)</td><td>Private (progressive)</td><td>Microschools</td><td>Virtual schools</td><td>Homeschools</td></tr>
<tr><td>Publicly-funded schools operated by local districts</td><td>Publicly funded, independently-operated schools/ networks under a charter with a local or national authority</td><td>Tuition-funded, independently-operated schools/ networks with conventional design; includes parochial schools</td><td>Non-micro independent schools or networks that embrace unconventional practices/ pedagogies</td><td>Independent schools with small class sizes (i.e., 8-12 students per class) and no more than 150 students total</td><td>Full-time, credit-bearing remote learning options that are state- or tuition-funded</td><td>System in which learners engage with all or some core programming at home, with a parent/ caregiver as guide</td></tr>
<tr><td rowspan="2">Facilitators
Organizations that work directly with Families, Learners, and Providers to make learning options more accessible via programming and/or resource networks</td><td colspan="2">Homeschool co-ops</td><td colspan="2">Learning / community hubs</td><td colspan="3">Community networks</td></tr>
<tr><td colspan="2">Collaborative homeschool networks that coordinate the sharing of resources, spaces, and support services so families and learners can interact/ learn outside of the home</td><td colspan="2">Organizations that provide a physical space and other resources needed for external actors (e.g., instructors, monitors) to deliver programming and/ or supervise learners</td><td colspan="3">Organizations that partner with actors across a community to provide or help families and learners navigate school choice options, out-of-school Programs, and/or facilitate finding supervised physical space for experiences</td></tr>
<tr><td rowspan="2">Out-of-school experiences
Programs that complement School; traditionally, these occur on a recurring basis when school is not in session but may be curated into a holistic School experience</td><td>Private tutoring</td><td>Courses / classes</td><td>Learning pod</td><td>Immersion</td><td>Service learning</td><td>Mentorship / apprenticeship</td><td>Community / affinity groups</td></tr>
<tr><td>Services that assist students in preparing for K-12 subject areas, via personalized instruction, generally in a "one-to-one" format</td><td>Learning or activity sessions hosted through various modalities (i.e., face-to-face, blended, online) facilitated by an instructor with a specific objective</td><td>Activities that take place in small groups, are led by an adult (who can be a parent or guardian, caregiver, tutor or educator), and typically occur in-person with a range of objectives</td><td>Learning that happens by engaging in hands-on activities for a specified, often uninterrupted, period (e.g., camps, excursions, competitions)</td><td>Learning that happens in real-world settings, generally occurring while school is in session and impacting a community or other institution / organization (e.g., service, internships)</td><td>Formal relationships with an individual (or several individuals), meeting regularly to focus on personalized development goals (often college and career-oriented)</td><td>Instructor- or group-led Programs offering activities and a safe space to promote specific values, personal, and/or social development (e.g., faith-based group, scouting)</td></tr>
<tr><td rowspan="4">Supporting infrastructure
Platforms, tools, and related services that provide critical supports to Programs and enable families to navigate and pursue learning options</td><td rowspan="2">Provider services and tools
Technology, services, and other infrastructure that supports Programs themselves by giving actors (e.g., families, operators, community groups) the resources and tools needed to educate</td><td colspan="4">Program operations and management</td><td colspan="3">Measurement and badging</td></tr>
<tr><td colspan="4">Administrative tools and services that enable operators and/or organizations to design, structure, and deliver a program (e.g., managed networks, scheduling, payment, microschool launch, curriculum development)</td><td colspan="3">Organizations that offer credentials to learners, either through Program partnerships or directly to the learner, to validate their learning outside of traditional grade- and subject-level standards; may be part of official record (i.e., transcript) or digital badges that codify learning but do not count towards a degree</td></tr>
<tr><td rowspan="2">Family services and tools
Platforms and tools that support families and learners in curating an out-of-system learning journey, including information and discovery resources for parents</td><td colspan="4">Program discovery</td><td colspan="3">Instructor matching/ training</td></tr>
<tr><td colspan="4">Databases or services that identify relevant alternative programs to families / learners based on pre-selected criteria and circumstance</td><td colspan="3">Platforms that allow families to search for and connect with potential instructors or other families to facilitate microschool / learning pod creation and tutoring relationships, often also offering direct-to-instructor training programs for member teachers</td></tr>
</table>

Source: Tyton Partners interviews & analysis

ABOUT TYTON PARTNERS

Tyton Partners is designed to be different. As the only advisor dedicated to the rapidly evolving Global Knowledge Sector, we have assembled a team of consultants, bankers, principal investors, operators, and educators to deliver industry-defining insights to power executives' and investors' critical decisions.

For more information, visit ***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 K-12 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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