

SCHOOL DISRUPTED

2022

PART 1: PANDEMIC-DRIVEN DECLINE IN K-12 PUBLIC SCHOOL ENROLLMENT CONTINUES



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In 2021, with support from the *Walton Family Foundation*, Tyton Partners set out to understand the impact of the COVID-19 pandemic on K-12 students and families. This effort culminated in *School Disrupted 2021*, a three-part publication detailing how families adapted and what new school models emerged in the wake of such disruption. This year, Tyton is publishing **School Disrupted 2022** in collaboration with the Walton Family Foundation and *Stand Together Trust*. In this report, we have extended our work from 2021 and explore how families continue to navigate traditional and alternative school models.

Drawing on two surveys of more than 6,000 K-12 parents, **School Disrupted 2022 covers key insights and implications** in three parts.

- **Part 1** offers updated estimates of K-12 enrollment across school models
- **Part 2** highlights the rise of multi-site schooling, a dynamic taking root across all types of school models
- **Part 3** identifies the factors that will influence future enrollment in a growing array of student-centric school models



PART 1: PANDEMIC-DRIVEN DECLINE IN K-12 PUBLIC SCHOOL ENROLLMENT CONTINUES

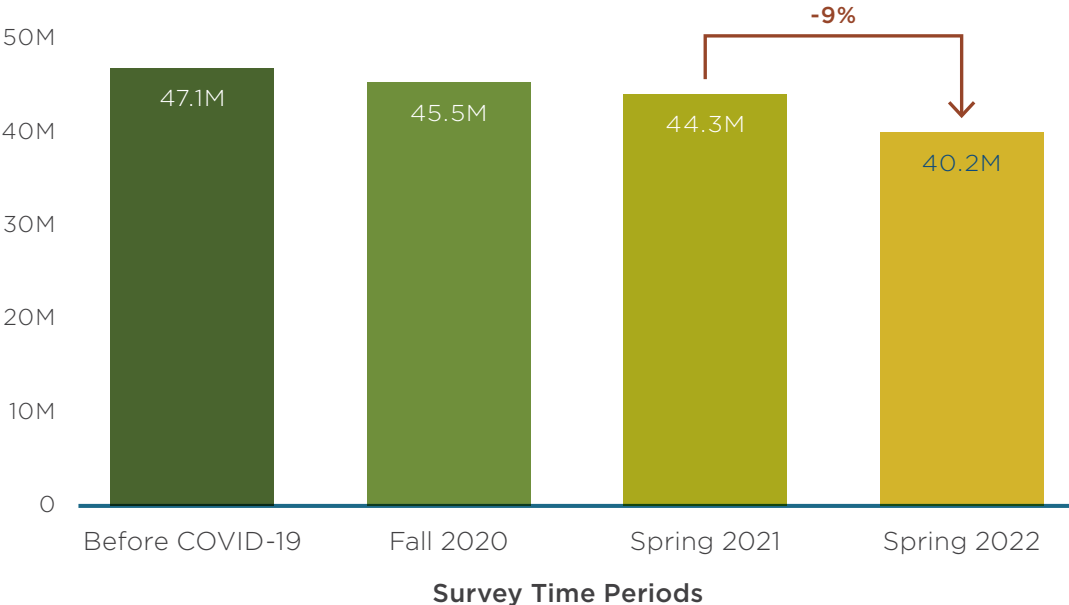
The COVID-19 pandemic caused a crisis in K-12 education. Public schools, especially, experienced plunging enrollments, while participation in homeschooling, learning pods and other school models spiked. After the pandemic subsided, many expected K-12 enrollment would return to its pre-pandemic distribution.

However, our analysis indicates that the seismic shift in K-12 enrollment persists as more parents choose to homeschool their children or enroll them in a charter or private school. Parents say the primary reasons for this shift are to combat learning loss and safety concerns. Moreover, the flexibility, adaptability, and personalization these alternatives offer are attractive to parents. School Disrupted 2022 examines parents' shifting preferences and the risks and opportunities they present particularly to K-12 public schools.

DISTRICT PUBLIC SCHOOLS CONTINUE TO LOSE STUDENTS

Tyton's analysis reveals that traditional district public schools have seen a significant decline in enrollment since 2019, a trend which is accelerating. **We estimate a nine percent (9%) decrease in district public school enrollment from Spring 2021 to Spring 2022 – a decline of more than four million students.**

Figure 1
Estimated decline in district public school enrollment 2021-2022



Notes: Pre-COVID-19 figures are 2020 NCES estimates; Fall 2020, Spring 2021, and Spring 2022 enrollment are estimated from proprietary survey data.
Sources: Tyton Partners Summer 2022 K-12 School Models Survey, Tyton Partners Fall 2021 K-12 Alternative Models Survey, Tyton Partners Spring 2021 K-12 Alternative Models Survey, NCES, AEI ReturnToLearn Tracker, Tyton Partners analysis

Our most recent survey was conducted after COVID-19 vaccines were widely available and mask mandates had lifted. At this point, nearly all district public schools had welcomed their students to come together inside classrooms once again. **This post-pandemic decline in K-12 public school enrollment suggests that this is no temporary anomaly but may instead reflect a tipping point.**

Such a decline in district public school enrollment has important consequences for all K-12 education. Lower student enrollment decreases state and federal funding for public schools while most school costs remain constant. Reduced revenue from serving fewer students may result in fewer or lower quality learning spaces and environments, which snowballs into more dissatisfaction with public schools and continued decline in enrollment. And, declining public school enrollment increases pressure on charter and private schools to support an influx of new students. These schools may not yet be prepared to serve more students, particularly those with special needs.

WHERE ARE STUDENTS GOING?

Even before the pandemic, districts faced persistent annual enrollment challenges due to a set of factors we call the **“Three Ds”**: **dropouts, demographics, and deferments.**

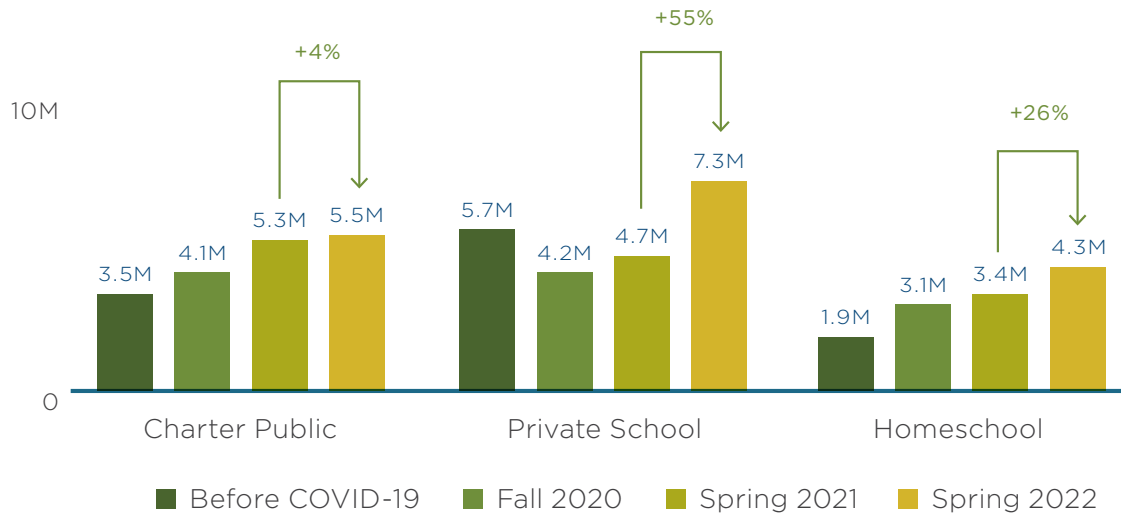
- Dropouts account for those students no longer attending school at all, a phenomenon that has experienced a sharp increase due to the economic effects of the pandemic
- Downward demographic pressures result in more students aging out of K-12 schooling than entering
- Deferments arise when families hold young children back for later starts to kindergarten, a trend that anecdotally appears to have increased during, and as a result of, the pandemic

From Spring 2021 to Spring 2022, we estimate a decline of roughly 300,000 students in district public school enrollment due to these three factors. This decline, however, accounts for less than 10 percent of the shift in enrollment out of public schools from Spring 2021 to Spring 2022. The implication is that **most students exited their district public schools to enroll in charter schools and private schools or pursue homeschooling as a result of their experiences during the pandemic.** Our analysis suggests that approximately 3.7 million students (and their families) made new decisions regarding their school choice in single year. In the near-term, the biggest beneficiaries were private schools, which saw the largest enrollment increase, followed by homeschooling and charter public schools (*Figure 2*).



Figure 2

Estimated increase in school enrollment at charter and private schools and homeschooling 2021-2022



Notes: Pre-COVID-19 figures are 2020 NCES estimates; Fall 2020, Spring 2021, and Spring 2022 enrollment are estimated from proprietary survey data.

Sources: Tyton Partners Summer 2022 K-12 School Models Survey, Tyton Partners Fall 2021 K-12 Alternative Models Survey, Tyton Partners Spring 2021 K-12 Alternative Models Survey.

LEARNING LOSS AND SAFETY CONCERNS DRIVE SCHOOL CHOICE

Parents report their top reasons for changing schools are concerns with academic quality and safety considerations. While academic quality issues may have existed prior to COVID-19, the challenges presented by schooling during the pandemic created a new sense of urgency for many, catalyzing action. Families and students experienced ineffective remote learning and significant gaps in – and interruption of – education, which have been well documented. In our research, we also asked parents about their specific safety concerns. Interestingly, **more parents mentioned bullying and gun violence than COVID-19 health protocols.**

In addition, our analysis determined that parents’ political beliefs had little to no impact on their reasons for changing their child’s school. Conservative, liberal, and moderate parents alike ranked academic quality and safety as their top motivations. Furthermore, choice over how and what their child learns ranked sixth out of 11 reasons for changing schools. This middle ranking was true across the political spectrum; overall, only seven percent (7%) of parents indicated curriculum choice was one of their top reasons for changing their child’s school since Fall 2020. This important non-finding suggests that curriculum choice is a less contentious issue than might be perceived. Parents across the political spectrum appear more similar than different in priorities for their children.

PARENTS SHOW PANDEMIC-DRIVE INTEREST IN STUDENT-CENTRIC LEARNING ENVIRONMENTS

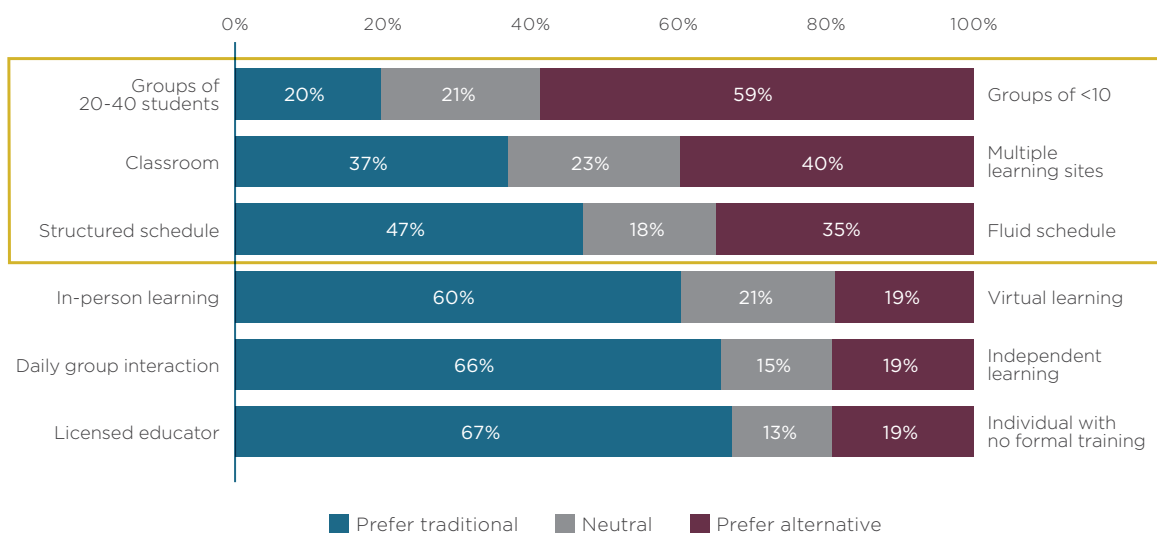
Of the two primary reasons for parents changing their child’s school, “academic quality” was the most common. But what does “academic quality” mean to parents and how do charter and private schools and homeschooling address this concern? We believe a primary differentiator of academic quality is the type of learning environments that various school models offer students.

Our research suggests **post-pandemic, parents prefer student-centric learning environments which may be different than those generally found at district public schools.** These environments place a priority on creating a space where learning is flexible, adaptive, and personalized to student needs. More than half of parents prefer environments that create experiences such as:

- Learning in small groups of less than 10 students
- Multiple learning sites outside of the classroom
- A flexible daily schedule driven by the student’s needs

Figure 3

Preference for traditional and student-centric learning experiences



Note: Survey question “Please use the sliders below to indicate your ideal preferences for your child’s school experience for each of the following dimensions.” n = 3,085

Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

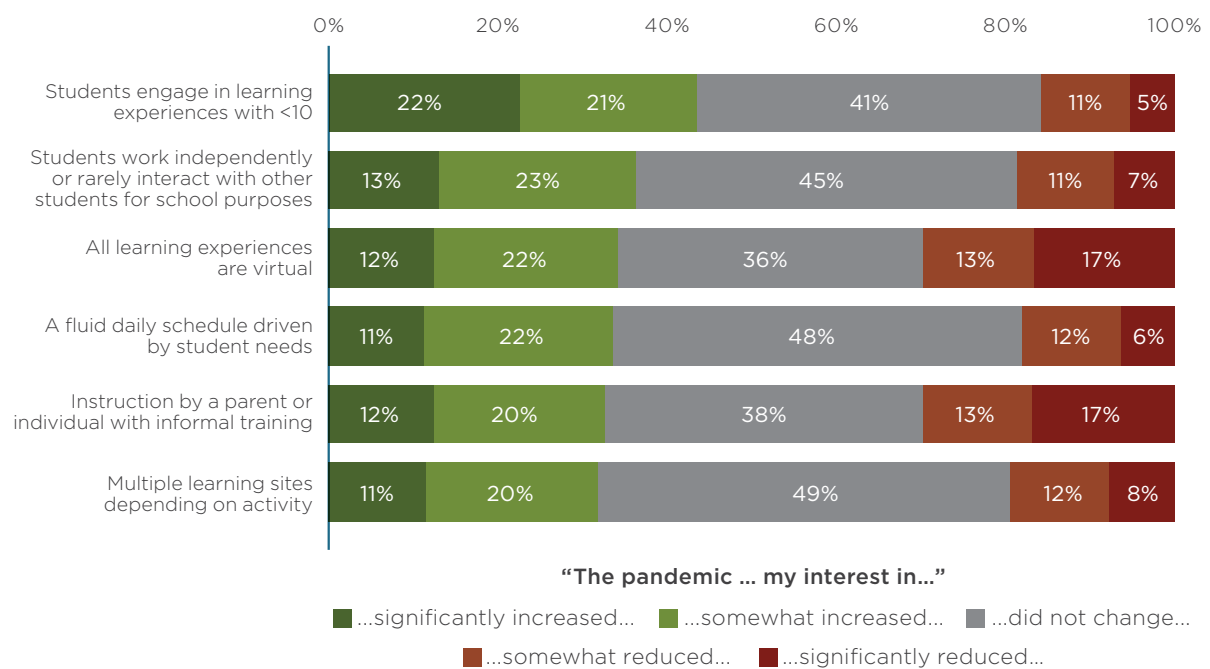
These preferences are in direct contrast to the more traditional, one-size-fits-all public-school model that typically offers learning in large groups (i.e., sometimes exceeding 30 students per class), a single learning site (i.e., the school/ classroom), and a structured daily schedule.

In fact, our analysis¹ revealed parents who had stronger preferences for student-centric learning experiences were more likely to have switched their child out of district public schools. This suggests that recent exits from K-12 public schools are occurring in part because parents are finding more compelling student-centric learning environments in charter or private schools or through homeschooling.

Up to **40% of all parents said the pandemic influenced their current preference for more student-centric learning experiences.** This is particularly true for experiences such as virtual learning and flexible daily schedules. Both saw dramatic increases in participation directly due to school shutdowns.

Figure 4

Change in interest in student-centric learning experiences due to pandemic



Note: Survey question “How has the pandemic changed your interest in the following features of your child’s school experience?”
n = 3,085

Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

But the data also show that parents continue to value traditional pillars of schooling; for example, nearly 70% of parents prefer that a licensed educator teach their children and that their children have regular, in-person interaction with peers.

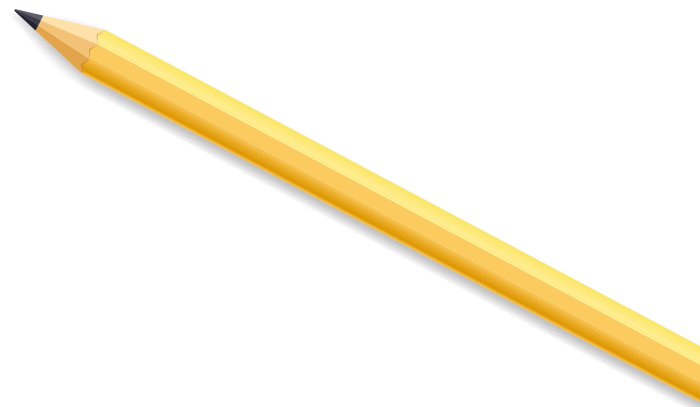
1. Regression results show that the more a parent prefers alternative learning experiences, the more likely they are to have switched out of public schools since Fall 2020. However, our results also suggest that this is not the only reason for switching schools though it is importantly one of them.

PART 2: WHAT BRIDGES TRADITIONAL AND STUDENT-CENTRIC LEARNING ENVIRONMENTS?

In **Part 2** of this series, we detail an emerging model that appears to bridge preferences for both traditional and student-centric learning environments: multi-site schooling.

We define “multi-site schooling” as a model in which students pursue learning in more than one location. In this model, students pursue educational experiences in a primary setting, such as a conventional school, as well as a secondary setting(s), such as the home or a community-based organization.

Our research suggests the flexible nature of multi-site schooling is of increasing interest to parents post-pandemic as it allows them optionality on the spectrum of traditional and student-centric environments. We will investigate the emergence of multi-site schooling, as well as key influences on alternative school model enrollment in upcoming publications.



The intent of our research is to use the parent perspective as a point of triangulation for measuring the impact of the pandemic on the distribution of school enrollment. This report draws on responses from two surveys of more than 6,000 K-12 parents that were conducted in May 2022. Respondent demographics were nationally representative of parent and student age, race, U.S. geographical region, and household income.

*If you have questions or additional thoughts, we would value the opportunity to **continue the conversation**.*

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Stand Together Trust

Stand Together Trust is a grantmaking organization dedicated to supporting bottom-up solutions that revitalize the key institutions of society: business, communities, education, and government. Stand Together Trust is a part of the Stand Together community, a philanthropic community tackling the root causes of America's biggest problems. To learn more, please visit StandTogetherTrust.org.

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**PART 2: MULTI-SITE SCHOOLING AS
A BRIDGE BETWEEN TRADITIONAL
AND STUDENT-CENTRIC LEARNING**



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*This is Part 2 of a three-part publication on K-12 enrollment trends by **Tyton Partners** supported by the **Walton Family Foundation** and **Stand Together Trust**. Our work draws on two nationally representative surveys of more than 6,000 K-12 parents conducted in May 2022.*

Part 1 of **School Disrupted 2022** detailed the substantial decline in K-12 public school enrollment since Fall 2020. Our analysis indicates that **9% of public-school students** – or approximately four million students – **have shifted to charter or private schools, homeschooling**, or did not enroll in the K-12 system entirely. We also highlighted parents’ shifting preferences for student-centric learning environments that are, in part, driving this enrollment shift. These preferences have implications for all school models, but present perhaps both the greatest risk and opportunity for K-12 public schools where parents’ desired experiences for their children may be lagging.

In **Part 2**, we explore the emergence of **multi-site schooling¹**, a model in which students pursue learning in more than one location, including a conventional school setting and other settings such as the home or a community-based organization. This model is gaining awareness – and traction – with parents, and we explore why this is occurring and the various ways in which parents and students are engaging in it.



1. Multi-site schooling has also been referred to as the “collegiate model”, “community-based learning” and “hybrid learning”. To avoid confusion, we use the term “multi-site schooling” throughout the School Disrupted 2022 series.

PART 2: MULTI-SITE SCHOOLING AS A BRIDGE BETWEEN TRADITIONAL AND STUDENT-CENTRIC LEARNING

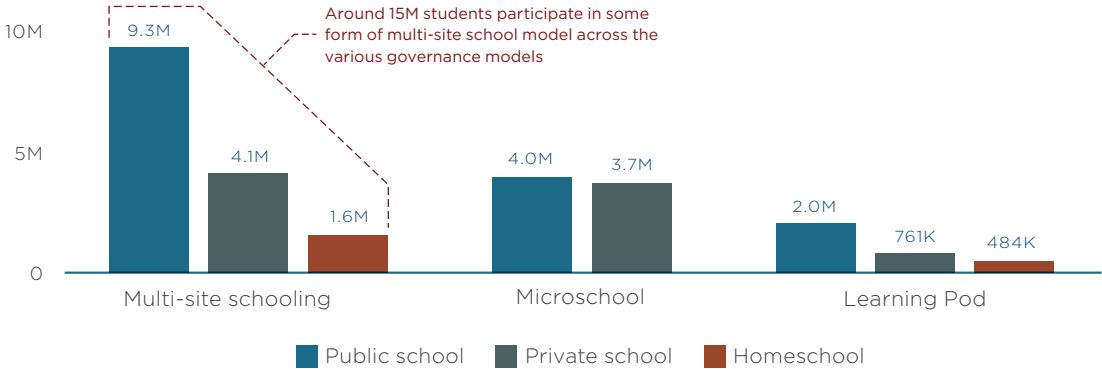
CONSIDERABLE NUMBER OF K-12 STUDENTS ARE ALREADY LEARNING IN MULTIPLE SETTINGS

For students, the primary and secondary settings in the multi-site school model vary considerably and can include conventional schools, learning pod-style settings, other site-based community locations (e.g., libraries, local employers, faith-based institutions), online/virtual learning programs, and parent-led instruction at home. For example, a student might rely on their district public school as the primary setting for traditional academic subjects and exploration, while also engaging in a learning pod two days a week for small-group experiences. Another student may attend a site-based microschool but spend one day a week in a homeschool setting, benefiting from periods of independent learning. Yet another student might be primarily homeschooled while also pursuing opportunities in a laboratory environment at a local college or company setting.

In our research, parents indicated that multi-site schooling was an especially popular student-centric learning experience. While about a third of parents with homeschooled children or children in public school reported engaging in multi-site schooling, more than half of those with children in private school reported the same. In total, we estimate **approximately 15 million students are currently participating in a multi-site schooling model.**

Figure 1

Estimated enrollment in student-centric school models by governance



Note: Survey question: “Which of the following are true about the school model your child is currently enrolled in?” n= 3,085; *Assumptions are made based on NCES projections for 2022 public school enrollments and School Disrupted 2021 data, which are in line with most recent data available. Enrollments for the above alternative models are not mutually exclusive, for example students could engage in a hybrid model with a microschool and be counted as part of the enrollment number for both; **Multi-site schooling is defined as regularly attending a secondary learning site in addition to the primary school site; Learning Pod is defined as a paid educator educating a small group of non-sibling children; Microschool is defined as a school that is intentionally small, limiting overall enrollment to less than 150

Sources: Tyton Partners 2022 K-12 School Models Survey, NCES, School Disrupted 2021, Tyton Partners analysis

In **Part 1** of **School Disrupted 2022**, we discovered that parents who preferred student-centric learning experiences were more likely to have shifted their children out of district public schools and into charter schools, private schools, or homeschooling, resulting in considerable declines in district public school enrollment. At the same time, the rise of **multi-site schooling models may represent a bridge between parents' preferences for more student-centric environments and the existing benefits** (e.g., convenience, affordable “cost”) of **district public schools**.

MULTI-SITE SCHOOLING PREFERENCES AND POTENTIAL BARRIERS

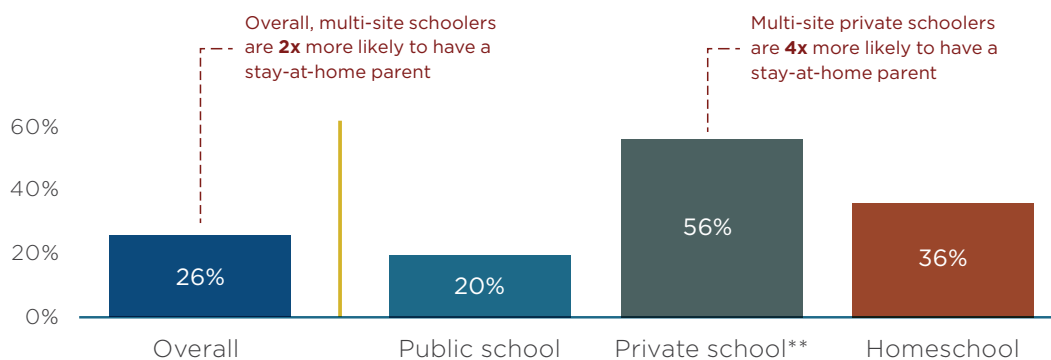
Multi-site school models function differently for families. Students' time spent at each setting can involve one day a week, a few hours each day, or up to multiple days a week. And students have varying motivations for pursuing multi-site options. For example, our analysis indicates that public school students are more likely to pursue multi-site options to increase academic engagement. Among private school students, location- and/ or equipment-specific environments, such as art studios and laboratories, are often primary drivers. Not surprisingly, homeschooled students pursue multi-site learning to increase their involvement in extracurriculars and interaction with peers.

Parents report that they are most likely to serve as instructors themselves in non-traditional settings (e.g., home). However, up to one-third of parents with children learning in multiple settings also report relying on paid educators or a combination of unpaid parents to teach their children (e.g., through a community-based organization or learning pod).

Higher-income families – i.e., those with household income greater than \$150,000 – are more likely to engage in multi-site schooling. In fact, students involved in multi-site schooling are twice as likely to have a stay-at-home parent, likely because of the need for a parent or caretaker to transport the student between different sites. Some families also have the option of paying for private shuttles to drive their children between learning sites. Both of these scenarios suggest that **transportation is a barrier to equity in multi-site schooling**; participation in multi-site schooling may increase with district or community investments in low-cost transportation solutions.

Figure 2

Multi-site schooling participation by governance



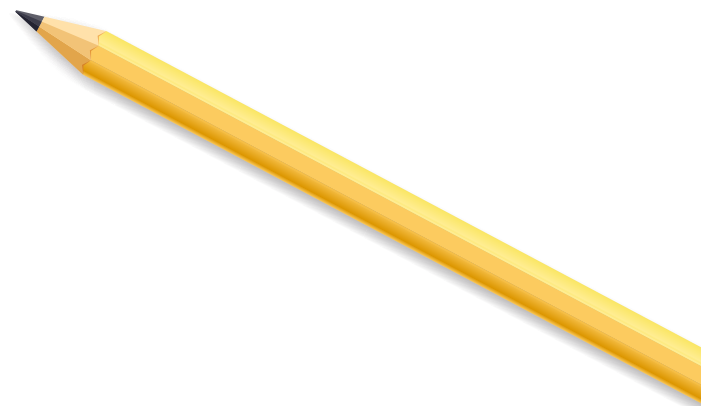
**Note: Survey question “Does your child regularly learn in any other setting besides this school during the week as part of their core school (i.e., not tutoring)?” n= 3,085; Public school n= 500, Private school n= 220, Homeschool n= 84; **difference in engagement in hybrid schooling between public and private school is statistically significant (z=-15.0, p<.001)*

Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

PART 3: TOWARD GREATER AWARENESS OF STUDENT-CENTRIC SCHOOL MODELS

Even as parent preferences for student-centric learning environments have increased, preferences for some traditional educational “features” persist – most notably having a licensed educator and regular peer group interaction – and multi-site schooling appears to help bridge the two. However, not all parents appear to be aware of school models that create student-centric environments.

How is awareness connected with interest and intent to enroll in such school models? In **Part 3**, we shed light on the current perceptions of student-centric environments, as well as identify factors that influence enrollment in various school models in the future.



*In 2021, with support from the **Walton Family Foundation**, Tyton Partners set out to understand the impact of the COVID-19 pandemic on K-12 students and families. This effort culminated in **School Disrupted 2021**, a three-part publication detailing how families adapted and what new school models emerged in the wake of such disruption. This year, in collaboration with the Walton Family Foundation and **Stand Together Trust**, Tyton extended the work from 2021 to look specifically at how families continue to navigate various traditional and alternative school models in *School Disrupted 2022*.*

The intent of our research is to use the parent perspective as a point of triangulation for measuring the impact of the pandemic on the distribution of school enrollment. This report draws on responses from two surveys of more than 6,000 K-12 parents that were conducted in May 2022. Respondent demographics were nationally representative of parent and student age, race, U.S. geographical region, and household income.

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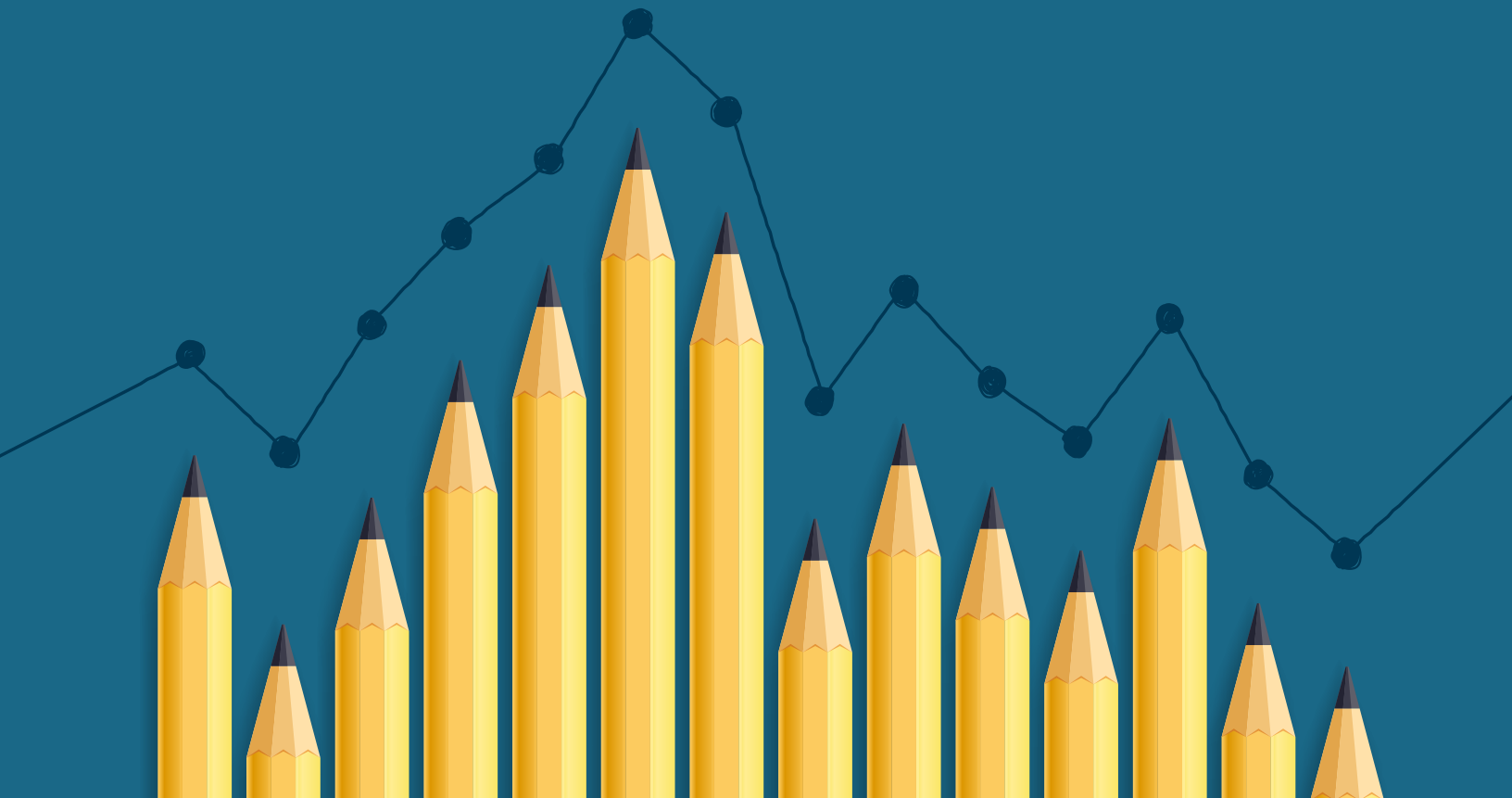


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PART 3: WHAT PARENTS KNOW (DON'T KNOW) IMPACTS SCHOOLING DECISIONS



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*This is Part 3 of a three-part publication on K-12 enrollment trends by **Tyton Partners** supported by **Stand Together Trust** and the **Walton Family Foundation**. Our work draws on two nationally representative surveys of more than 6,000 K-12 parents conducted in May 2022.*

Part 1 of **School Disrupted 2022** estimated that district public school enrollment has dropped 9% since Fall 2020, while enrollment in charter and private schools and homeschooling has increased.

Part 2 reported on the emergence of multi-site schooling models, a more flexible school model that marries parents' preferences for traditional and alternative learning environments.

In **Part 3**, we review how awareness of and interest in alternative school models (i.e., those that are not district public schools and are perceived to be more alternative) are related, what concerns parents about these models, and how the K-12 landscape might adapt to parents' changing preferences.

AWARENESS OF ALTERNATIVE SCHOOL MODELS HIGHLY RELATED TO INTEREST IN ENROLLMENT

In our analysis, nearly half of parents reported they are interested in alternative school models. But they also expressed concerns about the cost of these models and their (perceived) ability to prepare their children for college and/or careers; this latter factor was generally connected to parents' lack of awareness regarding the outcomes of alternative school models. The balance of parents reported they are not interested in alternative school models. However, our data shows these parents are also largely uninformed about these models, and they cited lack of awareness as the top barrier to any further interest.

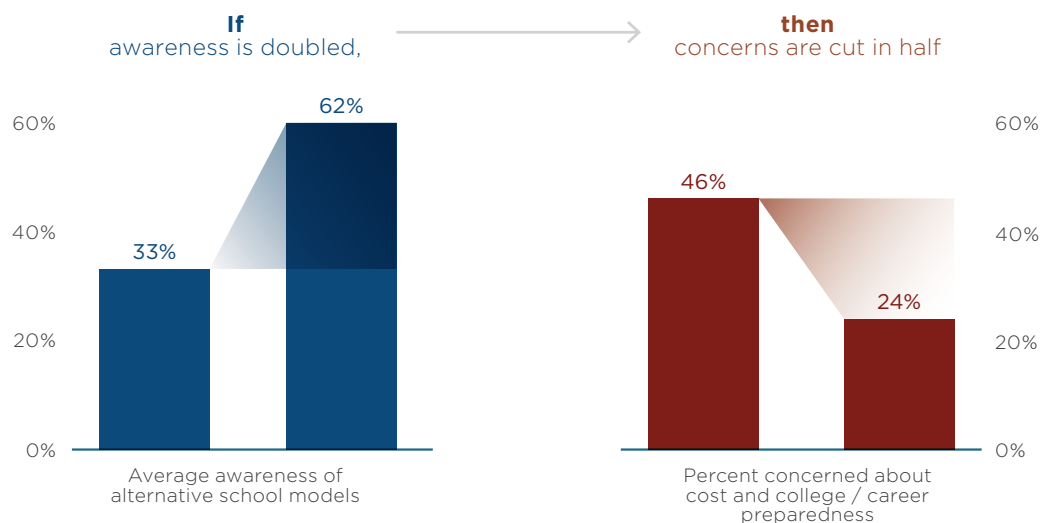
In fact, awareness of alternative school models proved to be key in understanding actual potential future enrollment as two interconnected themes emerged from parents' responses:

1. Level of awareness of alternative school models
2. Likelihood of enrolling their child in an alternative school model in the next three years

Our analysis revealed that **awareness significantly predicts parents' reported likelihood of enrolling in alternative school models in the next 3 years**. More specifically, a 10% incremental increase in overall awareness of alternative school models corresponds to a 40% increase in likelihood of enrolling. This occurs because as awareness of these models increases, concerns about affordability and college and career preparation and readiness decline considerably; in fact, a near doubling of awareness among parents reduces their primary concerns by 50%, resulting in greater willingness to pursue an alternative school model.

Figure 1

Informed parents express fewer concerns about alternative school models



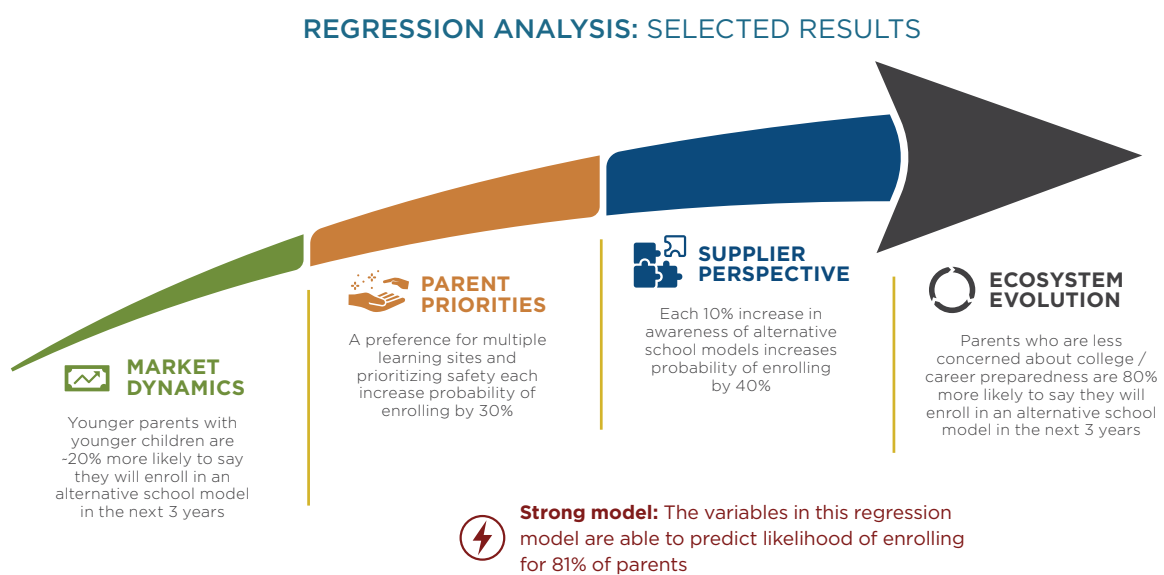
Notes: Odds ratios calculated from binary logistic regression, Nagelkerke pseudo-R square = .46, mean classification rate = 81%
Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

Several other factors also indicate a greater likelihood of parents to enroll their child in an alternative school model.

- Younger parents (i.e., age 40 and below) with younger children (i.e., ages 5-10) are 20% more likely to say they will enroll in an alternative school model in the next three years.
- When making educational decisions for their children, parents who prioritize safety and prefer multiple learning sites are more likely to enroll in alternative school models.
- On the other hand, parents who prioritize college and career readiness and preparation remain less likely to enroll their child in an alternative school model.

Figure 2

Factors influencing future enrollment in alternative school models



Notes: $n=3,085$; predictors are significant at $p < 0.05$; Model fit is moderate (Nagelkerke pseudo R-square = .46);

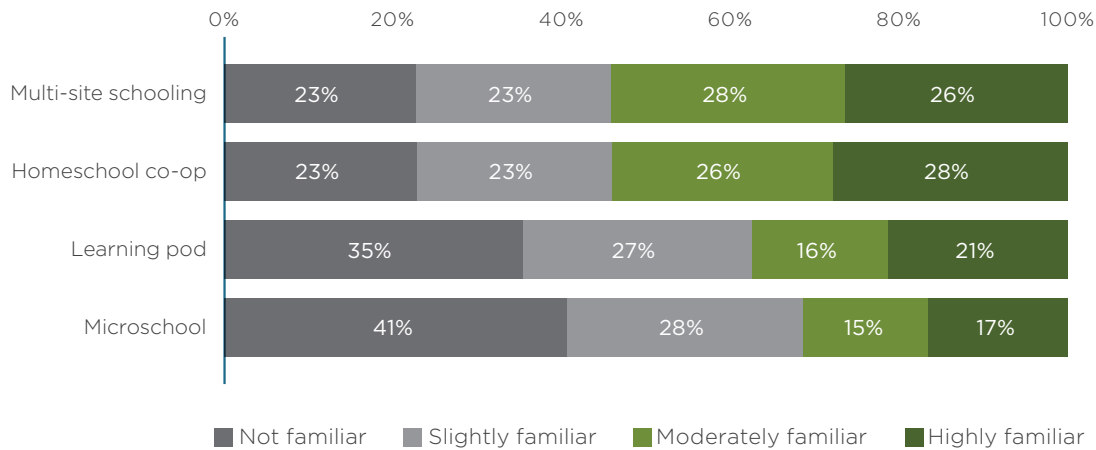
Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

Perhaps most surprising, factors such as race, household income, and neighborhood type (e.g., urban, suburban, rural) are not predictors of future enrollment. Rather, our data indicates that the most predictive variable determining a family's likelihood of enrolling their child in an alternative school model is awareness of the models themselves.

Currently, less than half of K-12 parents report meaningful familiarity with various alternative school models; to the extent that parents' awareness increases over time, the implication is that we may witness a continuing enrollment shift away from district public schools toward these alternative models.

Figure 3

Awareness of alternative school models



Notes: Survey question “How familiar are you with the following types of schools?”; n= 3,029

Multi-site schooling is defined as regularly attending a secondary learning site in addition to the primary school site; Learning Pod is defined as a paid educator educating a small group of non-sibling children; Microschool is defined as a school that is intentionally small, limiting overall enrollment to less than 150

Sources: Tyton Partners 2022 K-12 School Models Survey, Tyton Partners analysis

Together, these findings indicate that **as parents’ awareness of alternative school models increases, we may see increasing enrollment in these models across all types of families.** If we recall the parents above who had low awareness and interest in alternative school models, our analysis suggests that the low interest is a result of the low awareness.

K-12 SCHOOLS COULD EVOLVE TO OFFER FLEXIBLE LEARNING OPTIONS

Post-pandemic, we find that parents have continued to shift their children into charter and private schools and homeschooling and away from district public schools. This shift is partly due to the preference for more alternative learning experiences. We also detailed the rise of multi-site schooling, a school model that bridges traditional and alternative learning environments and provides flexibility for different kinds of learners. **These findings suggest that more parents are seeking flexible, adaptive, and personalized learning experiences for their children.**

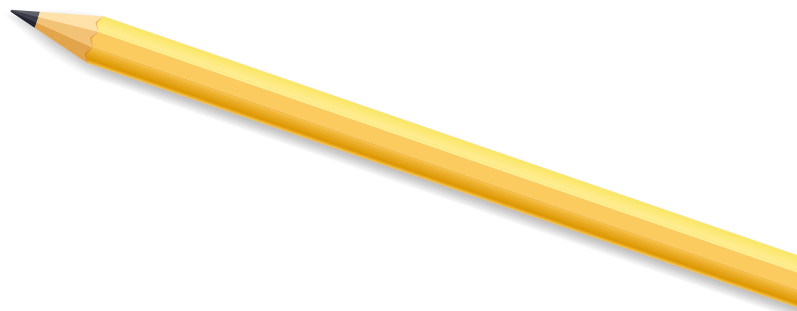
However, it is important to note that most parents still prefer the convenience of and lack of perceived cost for their child’s public school. In our data, 92% of parents rate their child’s district public school as highly convenient, and 74% of parents indicate they are unlikely to switch their child out of the district public school in the next three years because they don’t need to pay tuition. Therefore, **district public schools have an opportunity, in the wake of the pandemic, to be more responsive to parents’ shifting preferences and stem potential disenrollment of students.** This likely requires a reimagining of the learning options provided to students to foster more alternative experiences. Cleveland Metropolitan School District (CMSD) is simply one example¹, of many, demonstrating this foresight; during the pandemic CMSD partnered with community organizations to develop learning pods for low-income students struggling with remote learning. CMSD refers to this type of collaboration as part of their “wraparound strategy” to build a civic network that can support their students in flexible ways.

1. <https://crpe.org/wp-content/uploads/final-Cleveland-Metro-School-District-case-study.pdf>

Through the lens of parents across the country, School Disrupted 2022 has highlighted a significant shift in their expectations and aspirations regarding their children’s school experience. More student-centric learning environments are paramount for many families, and multi-site schooling scenarios are one approach addressing this desire. Moreover, parent preferences detailed across this publication highlight the urgency facing many district public schools grappling with high rates of student attrition to alternative school models.

These dynamics have the potential to reshape the contours of the K-12 school landscape. We would encourage K-12 stakeholders across the spectrum to continue to listen to parents’ voices as we emerge from the pandemic and reimagine the K-12 experience our children want, need and deserve.

Building on these themes and parent voice, Tyton Partners continues its investigation of how the K-12 landscape is evolving in the wake of the pandemic’s disruption. Our next report, **Choose to Learn**, further details parents’ broader aspirations and values related to their children’s education, and how the K-12 ecosystem can leverage both core and supplemental activities to address their evolving needs. Choose to Learn is slated to be released in **October 2022** so stay tuned for more.



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Stand Together Trust

Stand Together Trust is a grantmaking organization dedicated to supporting bottom-up solutions that revitalize the key institutions of society: business, communities, education, and government. Stand Together Trust is a part of the Stand Together community, a philanthropic community tackling the root causes of America's biggest problems. To learn more, please visit StandTogetherTrust.org.

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