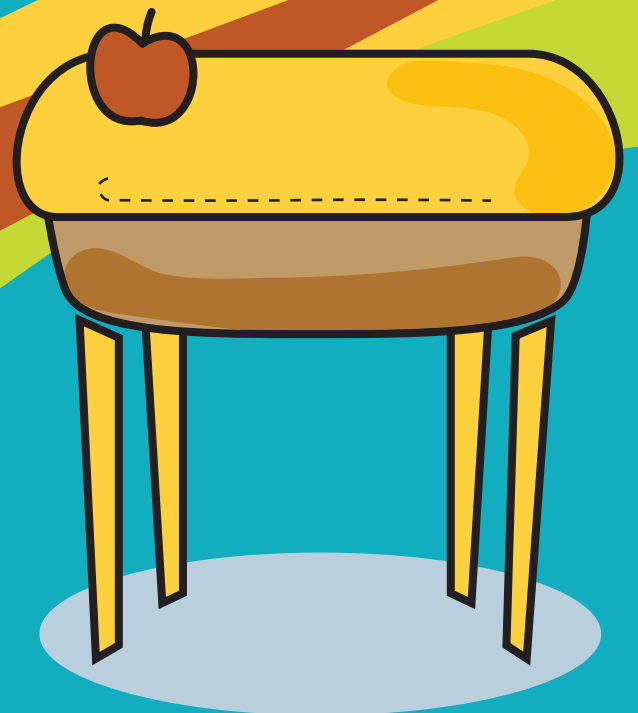


SCHOOL PART 1 DISRUPTED

The Impact of COVID-19 on Parent
Agency and the K-12 Ecosystem

May 2021



ACKNOWLEDGEMENTS

WALTON FAMILY FOUNDATION

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Finally, we would also like to thank the more than 3,000 parents who responded to our survey and the education industry leaders, policy experts and organizational leaders that we have interviewed during this process. The disruptions in school caused by the COVID-19 pandemic made this a difficult year for parents, teachers and students. As we begin to emerge from the crisis, we are optimistic some of what we weathered during this storm will result in transformative positive change, particularly for parents and their children's education.

ABOUT TYTON PARTNERS



Tyton Partners is the leading provider of strategy consulting and investment banking services to the education sector and leverages its deep transactional and advisory experience to support a range of clients, including companies, foundations, institutions, and investors.

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Research methodology, including demographics and response rates, are available in the Appendices on page 23. If you have any questions on the publication or would like to further discuss any K-12 topics, please contact Adam Newman at anewman@tytonpartners.com.

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Introduction

In 2020, many aspects of our lives were altered by the COVID-19 crisis, causing families to deal with unanticipated change and new levels of uncertainty. In particular, the pandemic's impact on K-12 schooling occurred unexpectedly and dramatically. Parents woke up one day to realize their usual routines of getting their children off to school and going to work were disrupted and they did not know for how long. By March 2020, 48 states and the District of Columbia, and four U.S. territories closed their school buildings for the remainder of the academic year in an attempt to slow the virus' spread. According to the U.S. Census Bureau, in the spring of 2020 nearly 93 percent of parents had children learning from home.¹

The abrupt switch to remote learning presented many challenges for educators, parents and students. Schools scrambled to get devices into the hands of students who didn't have access at home. Some families didn't have the connectivity required for remote learning. In fact, a Federal Communications Commission study reports that there are more than 14 million people without any internet access and 25 million without the faster broadband access needed to reliably support virtual learning.² School districts meanwhile were struggling with attendance. According to reporting from The New York Times, in one survey, most educators said fewer than half of their students were participating in remote learning. The Times also reported disengagement was especially high in lower-income communities, including many urban school systems.

As the spring went on and COVID-19 infection numbers continued to escalate in the United States, it became increasingly clear that the switch to remote learning would last not just weeks as initially anticipated, or even months, but would continue into the 2020-2021 school year. Some districts continued remote or hybrid models in the fall, while others went fully back to face-to-face in classrooms.

Meanwhile parents were dealing with myriad challenges, from juggling jobs with children learning at home and requiring supervision, to grappling with food insecurity, financial difficulties and concerns about the health and safety of their children and their extended families. Some became concerned about the impact remote learning was having on their children and began to explore and adopt school options outside of the traditional public and private school systems.

In response to these dynamics, Tyton Partners, with support from the Walton Family Foundation, launched a longitudinal research effort to learn more about this tumultuous year in the K-12 ecosystem and shifts in parents' decision-making regarding their child's education as a result of COVID-19. Over the course of this effort, extending from November 2020 through July 2021, we will examine the scale and scope of emerging learning models, such as learning pods, their sustainability beyond the COVID-19 crisis, their impact on the traditional K-12 ecosystem, and the magnitude of investment parents are willing to make both inside and outside of school.

In addressing these questions, we are also particularly interested in issues of equity and understanding the impact COVID-19 had on those unable to access or participate in various educational opportunities. We hope our research will shine light on the impact of the pandemic on K-12 education, what can be done to mitigate inequities resulting from the events of this past year, and how the K-12 ecosystem can continue to evolve to better serve all students.

¹ <https://www.census.gov/library/stories/2020/08/schooling-during-the-covid-19-pandemic.html>

² <https://www.fcc.gov/document/fcc-releases-2018-broadband-deployment-report>

RESEARCH HIGHLIGHTS: SHIFTS IN LEARNING MODELS, CHANGES IN SPENDING, UNEVEN EXPERIENCES

Feedback and data from parents in this initial survey generated a robust view of how parents were grappling with the impact of COVID-19 on their children's educational experiences during the 2020-21 academic year.

Notable insights include:

✍ When faced with the challenges brought on by the pandemic, many parents took greater responsibility for decision-making regarding their children's education. Fifteen (15) percent of parents changed their child's school for the 2020-21 academic year, which is estimated to be 2.5 times higher than behavior pre-pandemic.³

✍ Changing schools in light of COVID-19 led to declining participation in public and private schools and drove increases in homeschooling, learning pod and microschool participation.

✍ The fluid nature of the pandemic catalyzed a "new" solution – supplemental learning pods – with approximately 12 percent of parents enrolling their children in these learning pods as a supplement to their core school.

✍ Parents spent an estimated \$20 billion more on an annualized basis on education-related activities, driven primarily by increased participation in supplemental learning pods.

✍ The following five activities independently correlated with a parent's positive perception of their child's learning experience during COVID-19: 1) switching schools, 2) receiving in-person instruction and learning, 3) attending a private school, microschool or learning pod as the primary form of education, 4) participating in a supplemental learning pod, and/or 5) leveraging out-of-school education activities and resources.

✍ Higher-income families report engaging in all five of these factors at significantly higher rates than other families. Higher-income families also perceive – at higher rates than other families – a more positive impact of COVID-19 on their child's educational experience.

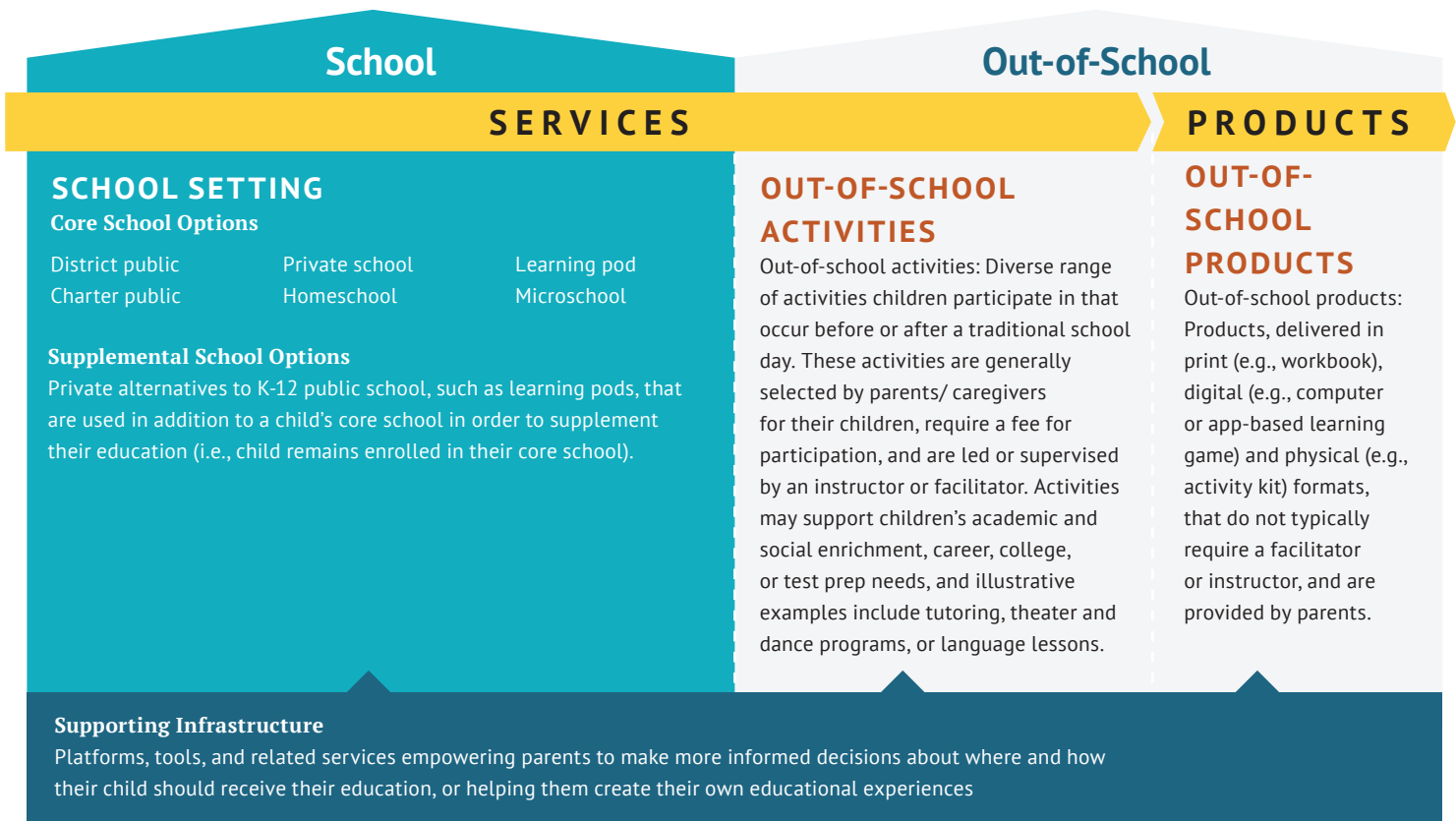
✍ While learning pods were a viable option for many parents during the COVID-19 school closures, questions persist regarding their sustainability. Parents across all income levels reported having to make lifestyle sacrifices for their children to participate in learning pods. In addition, setting up and managing learning pods can be complicated and places an additional burden on parents' time and resources.

✍ Limited awareness of, and access to, alternative and emerging learning models significantly hindered parent agency, particularly for parents at lower-income levels. Lower-income parents also struggled with other competing priorities, such as paying for housing and food insecurity.

³ According to 2018 research on student mobility from the Milwaukee Journal Sentinel, year-to-year school turnover or switching is about 10 percent across the U.S., although not all states report data.

EXPLORING PARENT AGENCY AND THE EVOLVING K-12 ECOSYSTEM

The overarching question the first part of our research, conducted between December 2020 and January 2021, sought to answer was “How has COVID-19 impacted parent agency and the broader K-12 ecosystem?” Within the context of this research, we define “parent agency” as a parent’s capacity to effect change in their children’s education. In collecting feedback from more than 3,000 parents nationwide, we looked specifically at shifts they made in their child’s education to establish a baseline for COVID-19’s impact on K-12 districts and schools. We examined changes in educational participation through the lens of the following taxonomy of schooling options and resources:



District public: K-12 public schools that receive government funding as the primary financial support and are operated by an education agency that coordinates and services public instruction.

Charter public: K-12 public schools that receive government funding but are independently operated and exempt from significant state or local regulations related to operation and management but otherwise adhere to regulations of public schools; operate as “schools of choice” for parents.

Private school: K-12 non-public schools, including both religious and non-sectarian schools, that are funded by tuition fees and donations from individuals and private third parties, and function outside the jurisdiction of state departments of education.

Homeschool: Model in which school-age children receive instruction at home instead of in a public or private school most or all the time, with instruction usually led or facilitated by a parent or caregiver, and follow state homeschooling regulations, which may include laws around attendance, testing, subjects, among other areas.

Learning pod: Learning environments in which small groups of school-age are educated together at a child’s home, a shared workspace, or a school building or community center; learning pods typically operate outside the jurisdiction of state departments of education but may be subject to homeschool regulations or in-home daycare requirements depending on the state.

Microschool: Small independent K-12 schools often characterized by size and structure – class sizes of typically 20 or fewer children, mixed-aged level groupings, innovative and/or active teaching models, and personalized approach and attention.

Survey respondents include parents making more than \$150,000 annually (referred to as higher-income parents); parents earning between \$35,000 and \$150,000 annually (referred to as middle-income parents); and parents earning less than \$35,000 annually (referred to as lower-income parents).

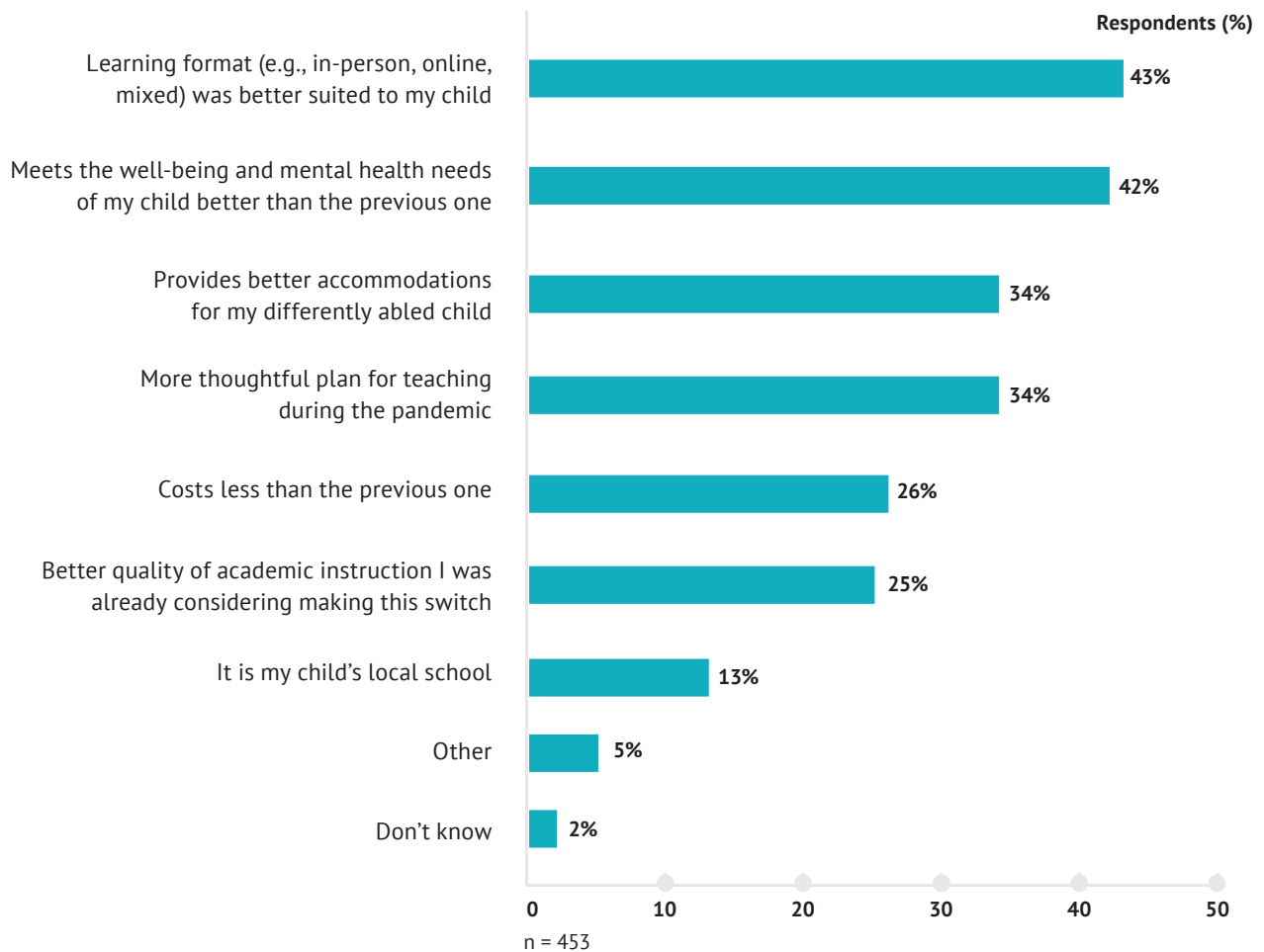
SECTION #1

COVID-19's dynamism in shifting the K-12 ecosystem

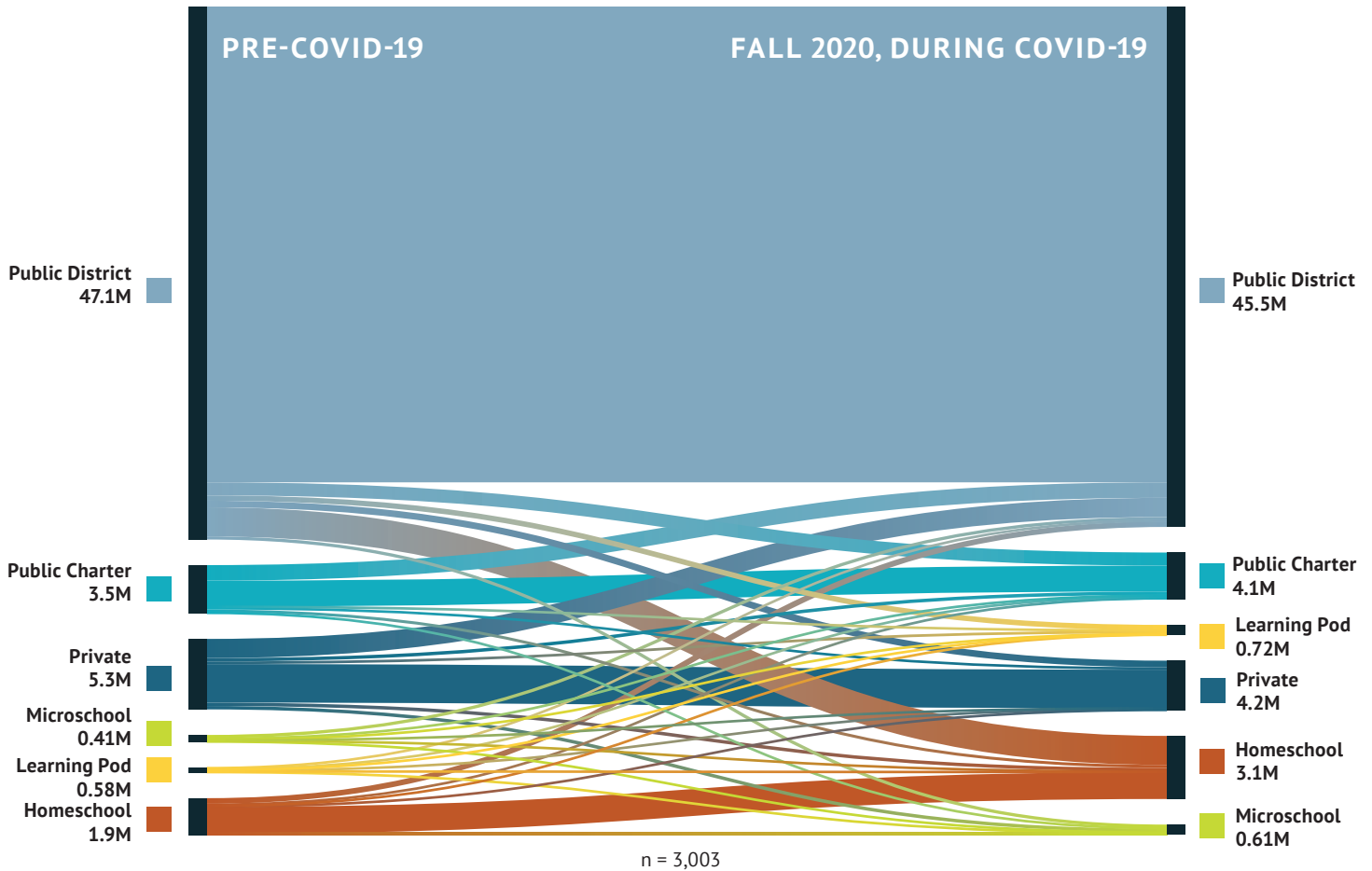
Following the rapid shift to remote learning in the spring of 2020, some parents recognized they needed to pursue other educational options for their children. Our research revealed COVID-19 drove nearly 15 percent of parents to make shifts in their children's school situation, and 12 percent of parents elected for their children to participate in supplemental learning pods in conjunction with their core school.

Overall, ensuring children's wellbeing and mental health was the top reason why parents switched their child's school. However, among lower-income parents, learning format (e.g., online or in-person) was the most prioritized factor. Most parents who did not switch reported that familiarity with their child's school and general satisfaction with it drove them to remain.

TOP REASONS FOR SWITCHING SCHOOLS FALL 2020, DURING COVID-19



PERCENTAGE USING A SUPPLEMENTAL LEARNING POD, FALL 2020, DURING COVID-19

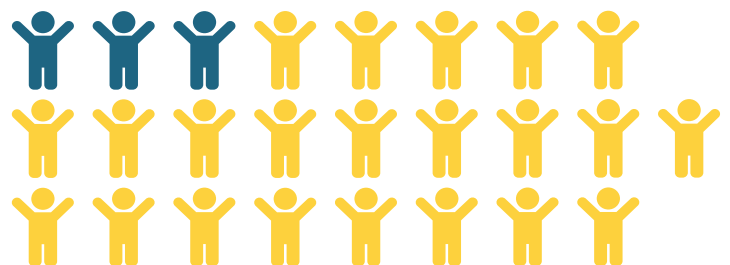


PERCENTAGE USING A SUPPLEMENTAL LEARNING POD DURING FALL 2020, DURING COVID-19

(Learning pods used in addition to their core school)

As a result of these shifts, district public and private schools saw an estimated decrease of 2.6 million in student enrollment, while charter schools, homeschooling, learning pods and microschools all realized a net increase in student participation. Reviewing these shifts brings many equity issues to light; income is not only correlated with the options available to parents, but also with the resources devoted to support the quality of those options.

12%



SURPRISING SHIFT OUT OF PRIVATE SCHOOLS

While hundreds of thousands of students moved in and out of private school as a result of COVID-19, we estimate private schools saw an enrollment drain of over 1 million students. Average annual tuition paid by families declined from \$11,400 to \$10,500 which, combined with enrollment declines, resulted in a \$19 billion estimated annualized contraction in spending on private school tuition fees. Higher-income parents shifted schools the most, which was reflected in them moving their children out of private schools at higher rates than those earning less. Lower-income parents, whose children made up less than seven (7) percent of the private school population before COVID-19, moved their children into private schools at higher rates and at lower average tuition-price points during the pandemic as compared to other parents.

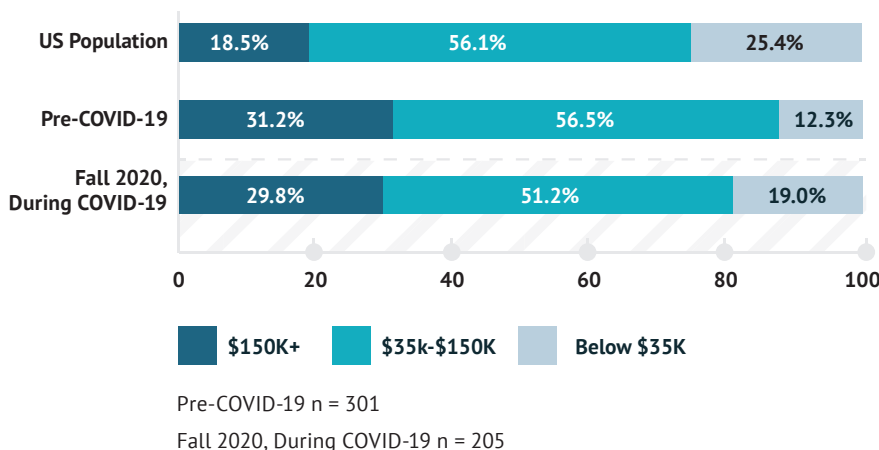
The decline in traditional private school participation could be caused by a multitude of factors, such as parents at higher-income levels having more options in terms of mobility – for example, leaving urban areas where their children were in private schools for more rural communities where they enrolled them in public schools. They were also more likely to use learning pods to supplement their child’s main school and turned to microschools at higher rates. Respondents who reported switching their child from private to public schools listed health and safety accommodations as the primary driver. Familiarity with the new school, cost, availability of (non-sport) extracurricular activities and recommendations from other parents were also significant factors. Our second parent survey will explore these potential drivers to arrive at some of the factors causing this shift.

“There are massively different things happening in the private school market. Enrollment in areas like New York City is down, because families have left the city or have enrolled their children in a pod. Many private schools, however, have seen an increase in enrollment since the pandemic.

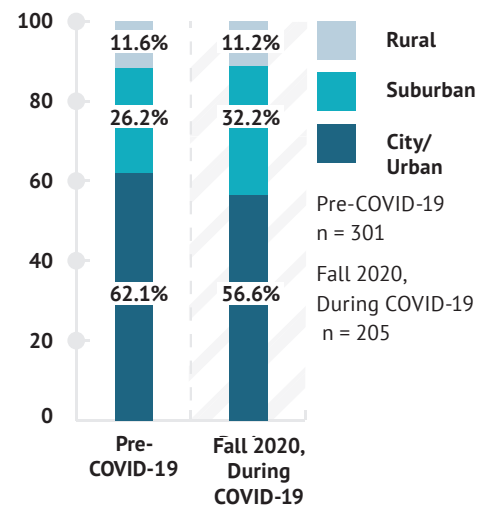
– Leader, Private School Association

Private School

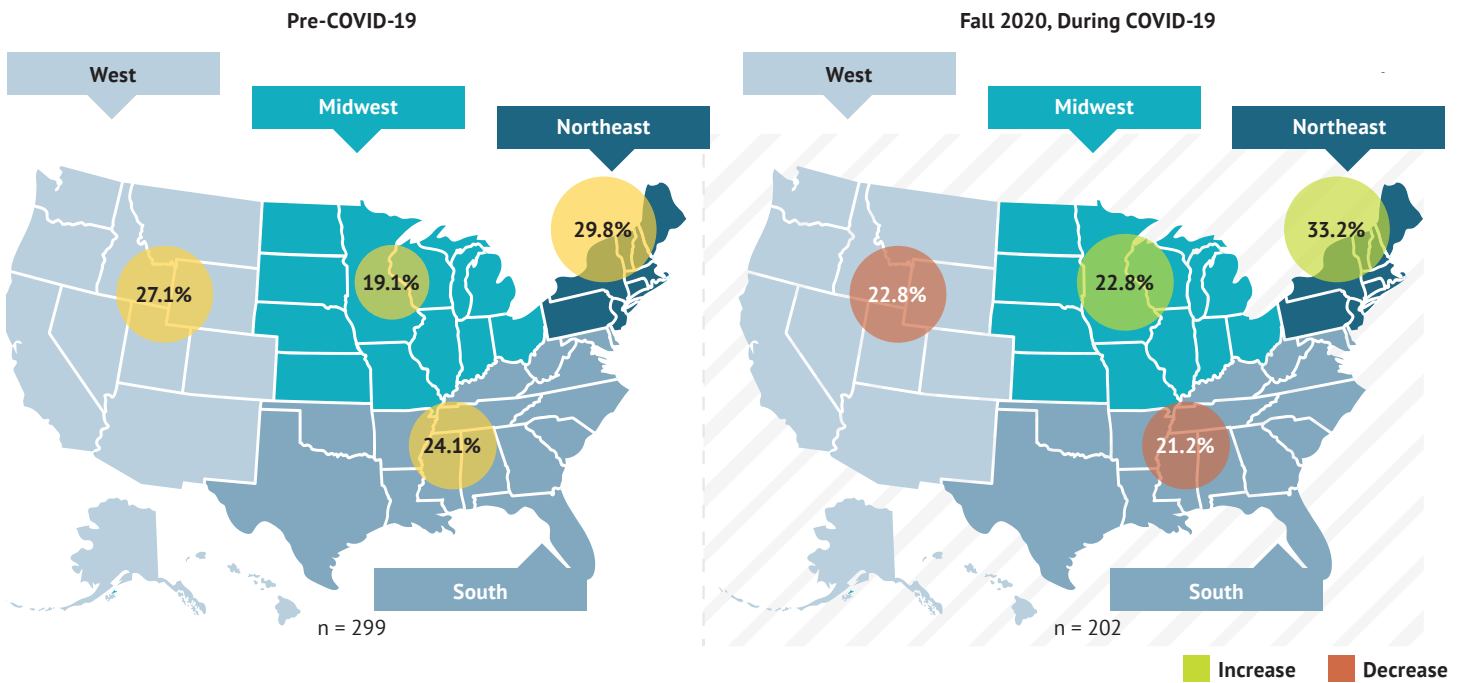
ENROLLMENT DISTRIBUTION BY INCOME



ENROLLMENT BY LOCALE



ENROLLMENT DISTRIBUTION BY REGION



EXPLOSION IN HOMESCHOOLING

While there are various approaches to homeschooling, largely based on the curricular approach, they all share the model where children are taught at home on a permanent or long-term basis, usually by a parent. Homeschooling saw explosive enrollment growth during COVID-19 – an estimated increase of 1.2 million students or 63 percent growth over the prior academic year. Middle- and lower-income parents drove this growth, and this shift underscores a troubling finding. Fifty-five (55) percent of lower-income parents who switched to homeschooling during the pandemic perceive it as “free” and are not spending any money to support it.

By contrast, only seven (7) percent of higher-income parents who switched to homeschooling see it as “free.” Fifty-one (51) percent of these parents spend more than \$500 per month to support homeschooling and almost a third report spending more than \$2,000 per month. This difference in spending across income levels raises potential questions about the quality of education being delivered, and the disparities that might have been heightened by the increased use of homeschooling during COVID-19.

“As a result of COVID-19, he is now homeschooled and has less interaction with peers, but I feel that academically he is ahead and enriched.

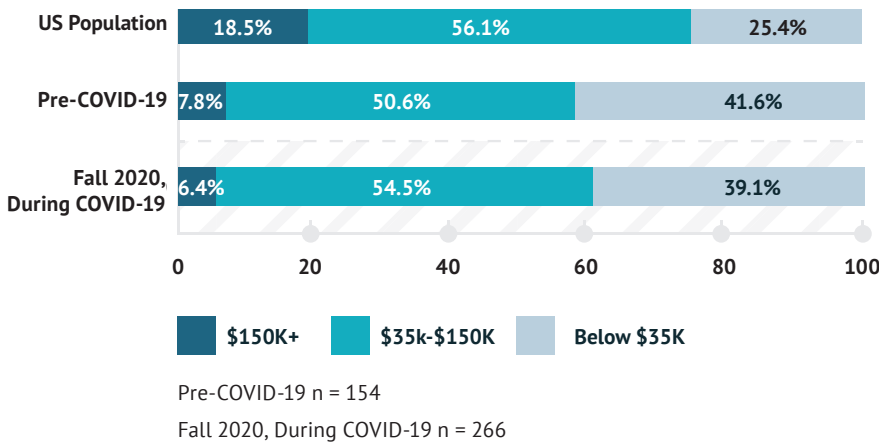
– K-12 Parent

Those living in rural areas, where a substantial portion of lower-income parents in the United States reside, were more likely to use homeschooling. It is possible that the switch to homeschooling for lower-income parents may have been driven by the lack of other viable options. Other life demands also may have meant that they did not have the financial resources, access, or time to pursue other options that can be more costly and difficult to set up and manage, such as learning pods.

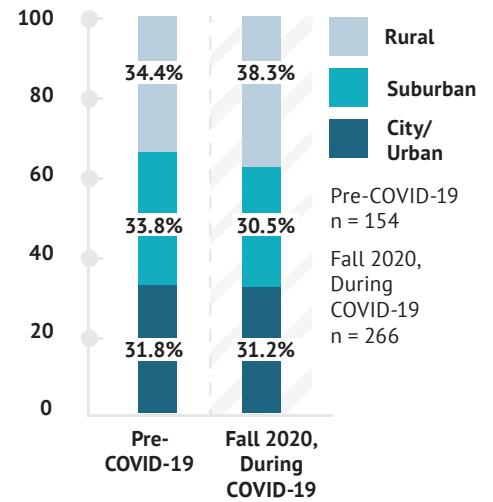
With substantial growth in homeschooling since COVID-19 and the pressures it can place on parents who are using this option as the primary means of educating their children, it is possible that there will be some reversion in choice and behavior as we come out of the COVID-19 crisis. However, some parents are reporting homeschooling has turned out to be a good fit for their child. We will probe in more depth on the educational experiences of homeschoolers during the 2020-21 year as we continue our research.

Homeschool

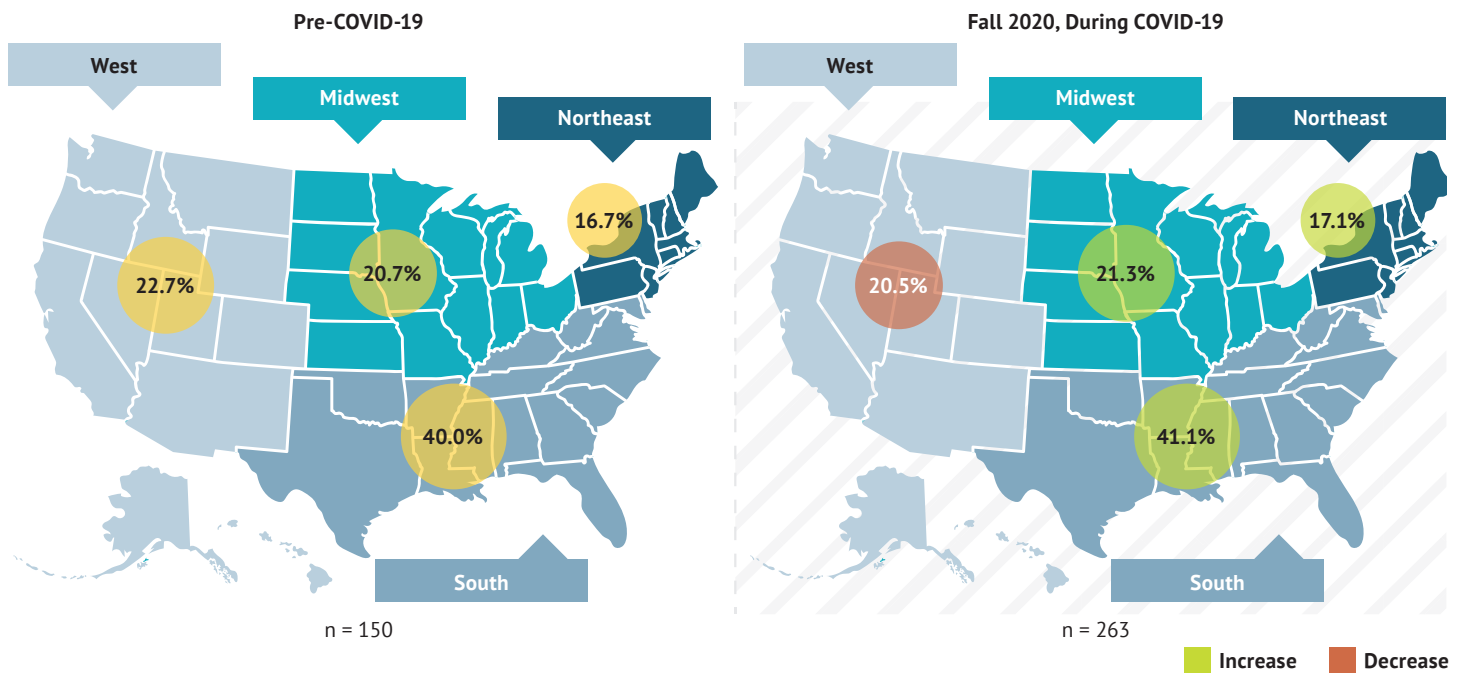
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ENROLLMENT BY LOCALE



ENROLLMENT DISTRIBUTION BY REGION



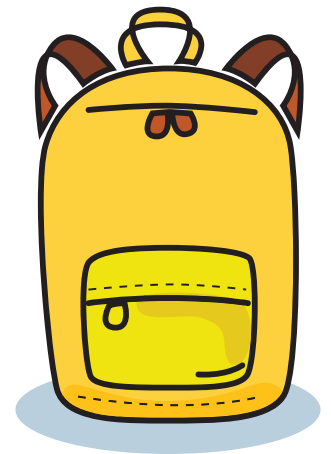
LEARNING PODS AND MICROSCHOOLS: FAD OR FUTURE?

The concept of a small group of children coming together to learn and socialize outside a traditional school environment, guided by a teacher, tutor or parent, has been around for decades. Often considered a blend between homeschooling and private schooling, these “microschool” models – Acton Academy, Prenda and Wildflower Schools⁴, for example – all began before COVID-19. During the pandemic, however, the idea of small group learning as an alternative to a child’s main school garnered significant attention from local and national media. There were countless news stories in the back-to-school 2020 timeframe that presented parents with tips for setting up their own “learning pods” and featured parents who were shifting to this option. Suddenly, learning pods appeared as a possibility for parents around the country who were looking for options beyond remote learning.

As parents considered microschools and learning pods as a primary educational option for their children, the idea of supplemental learning pods – where participation in the pod augments, but does not replace, their core school-based experience – emerged. While some parents chose microschool or learning pods as their child’s primary means of education, supplemental learning pod was 10 times greater than participation in learning pods as a core school. Our data indicates that 12 percent of parents enrolled their children in supplemental learning pods during the fall of 2020, accounting for an estimated 7 million K-12 students. Higher-income parents drove the growth of the supplemental learning pod category; 25 percent of these parents had at least one child in a supplemental learning pod, as compared to 11 percent of middle-income parents, and five (5) percent of lower-income parents. Learning pods as school replacement was most popular among students in grades 6-8, followed by K-2 students. High schoolers were 70 percent less likely than others to be involved in a pod. Use of supplemental learning pods was significantly more frequent among K-2 parents than any other age group.

Parents may have turned to supplemental learning pods for a variety of reasons. Many were concerned about keeping their children on track academically as well as supporting their social and emotional wellbeing. The face-to-face dynamic in learning pods can provide this support for children and using them as a supplement to school allows children to remain connected to their core school environment, curriculum and teachers.

While there has been a lot of buzz around learning pods, set up and management can be difficult. Parents who considered this option for their child reported a variety of challenges, from difficulties finding other families to participate and a qualified person to supervise to securing a suitable location to host the learning pod.



⁴ *Acton Academy*: Founded in 2009, Acton Academy has 254 affiliates in six continents, serving students in grades K-12. Students use online programs for most instruction with face-to-face teachers providing support. <https://start.actonacademy.org/>

Prenda: Founded in 2018, there are more than 200 Prenda microschools, serving students in grade K-8, with 5-10 students in each school. Prenda uses a blended model where students learn online with an “adult guide” working one-on-one with students, coaching and mentoring them. <https://prendaschool.com/>

Wildflower Schools: Founded in 2014, there are more than 50 Wildflower Schools in the United States and Puerto Rico. Wildflower is an ecosystem of decentralized Montessori microschools that support children, teachers, and parents. School size ranges from 10 to 45 students, ranging from toddlers to age 12. <https://wildflowerschools.org/>

A variety of approaches to and investment in learning pods emerged across income levels. Higher-income parents spent nearly seven times, and middle-income parents five times, as much as lower-income parents on learning pods. Higher-income parents were also more likely to use a certified teacher or other learning professional to lead their children’s learning pods and were more likely to hire a consultant to assist with setting it up. Compared to 38% of lower-income parents, 55% of higher-income parents hosted the learning pods at their homes. In contrast, lower-income parents were six (6) times more likely to host their child’s learning pod in a community center. Fourteen (14) percent of these parents were using learning pods primarily for childcare, contrasted to three (3) percent of parents at higher-income levels. These trends raise questions about the equitable access to and quality of learning pod environments across various income brackets.

Participating in these models also required sacrifices, particularly financial ones, for parents across all income levels. Nearly 30 percent of all parents reported that they had to work different hours to accommodate their child being in a learning pod and more than 20 percent said that they had to reduce spending, take on additional jobs or use savings to pay for the learning pod. These lifestyle sacrifices were relatively consistent across income levels.

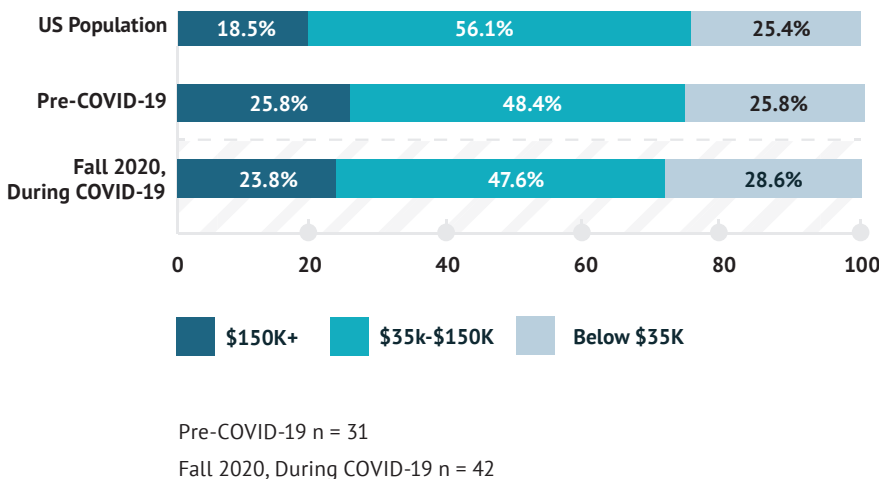
“Our daughter’s education has been impacted by her learning 100 percent remote at her public school. However, throughout the entire school year, we have supplemented her education and limited remote social interactions with pod learning. We feel that her overall education this year may be as good or slightly improved from what she might have experienced otherwise.

– K-12 Parent

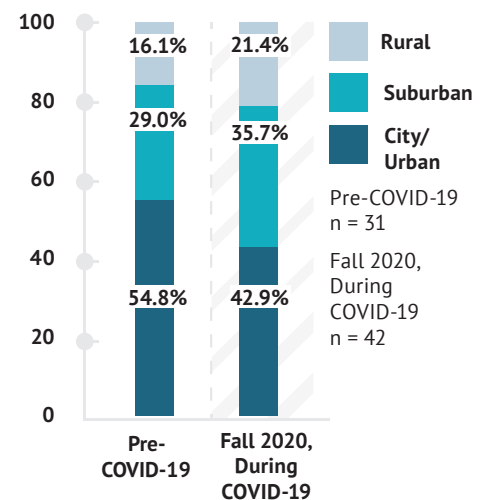
Will this year’s popularity of learning pods persist, evolve, or fade away? The answer to this question will require understanding parent expectations and needs, and carefully assessing if and how these models can offer high-quality support for student learning and socialization sustainably and at scale.

Learning Pods

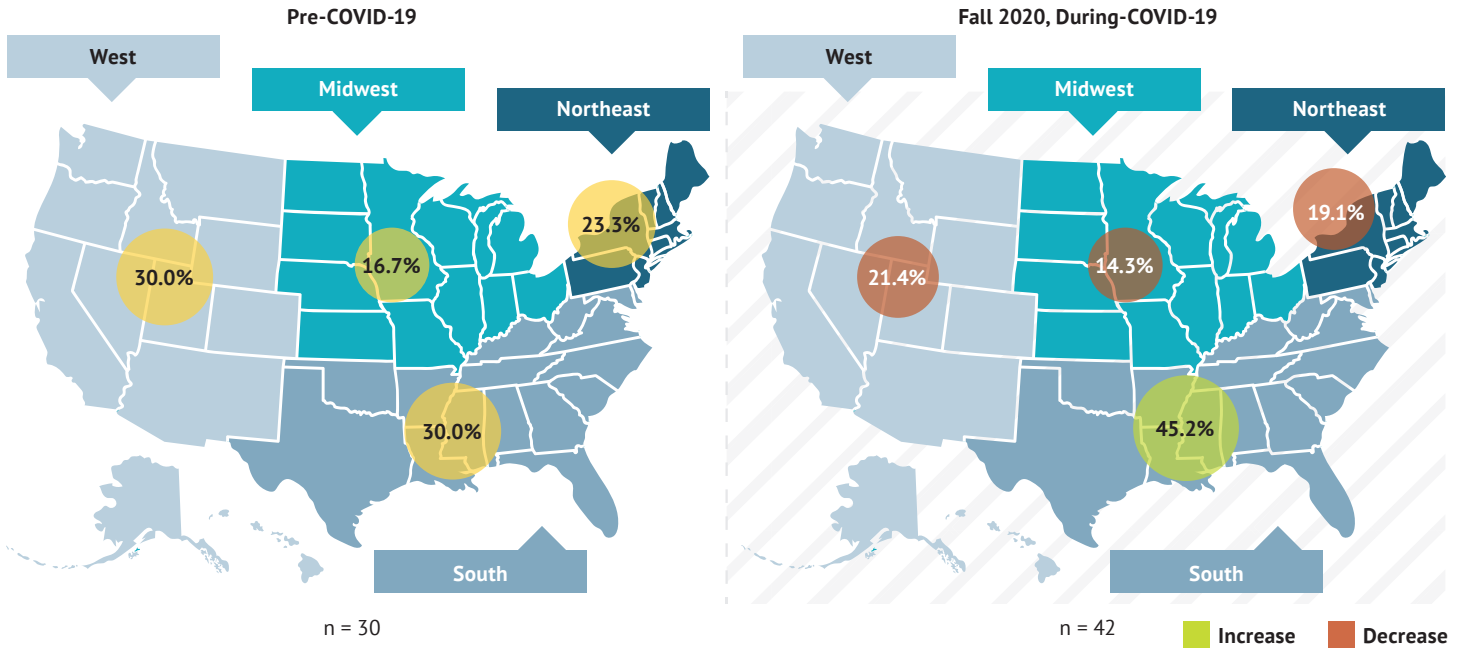
ENROLLMENT DISTRIBUTION BY INCOME



ENROLLMENT DISTRIBUTION BY LOCALE

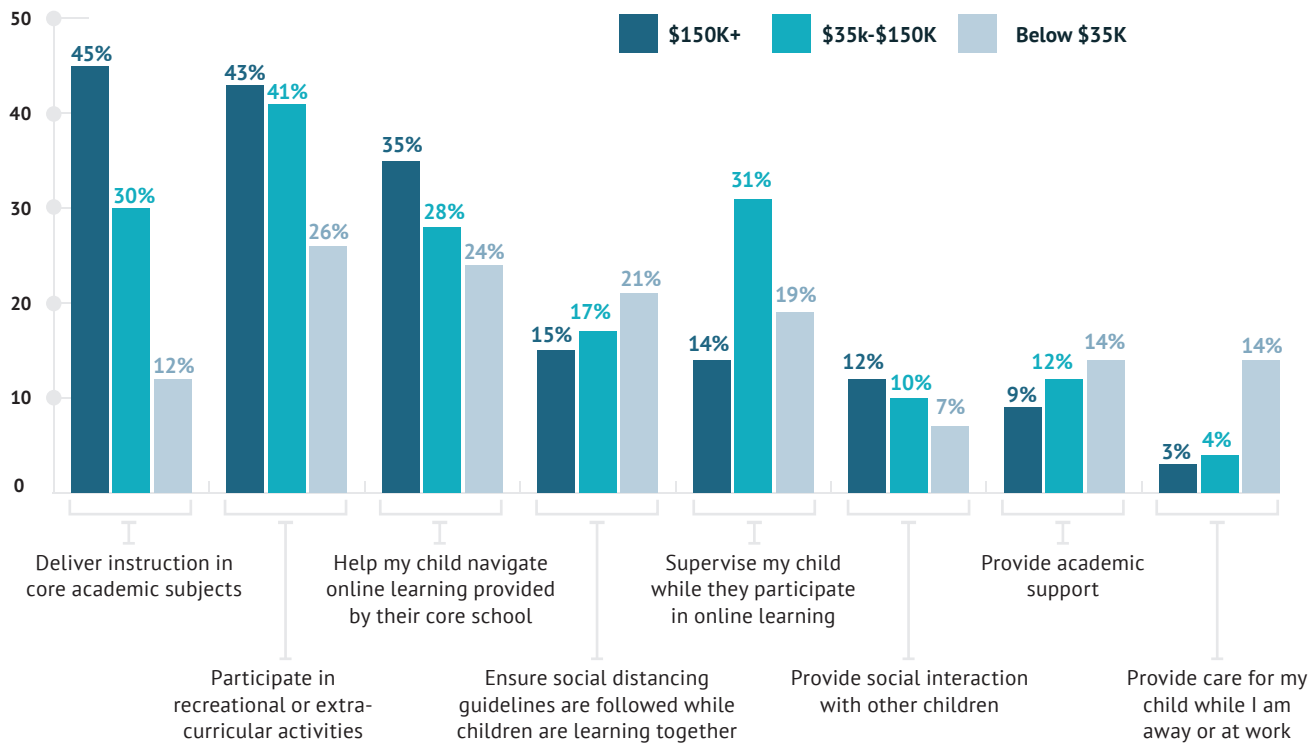


ENROLLMENT DISTRIBUTION BY REGION



PRIMARY PURPOSE OF LEARNING PODS, BY INCOME

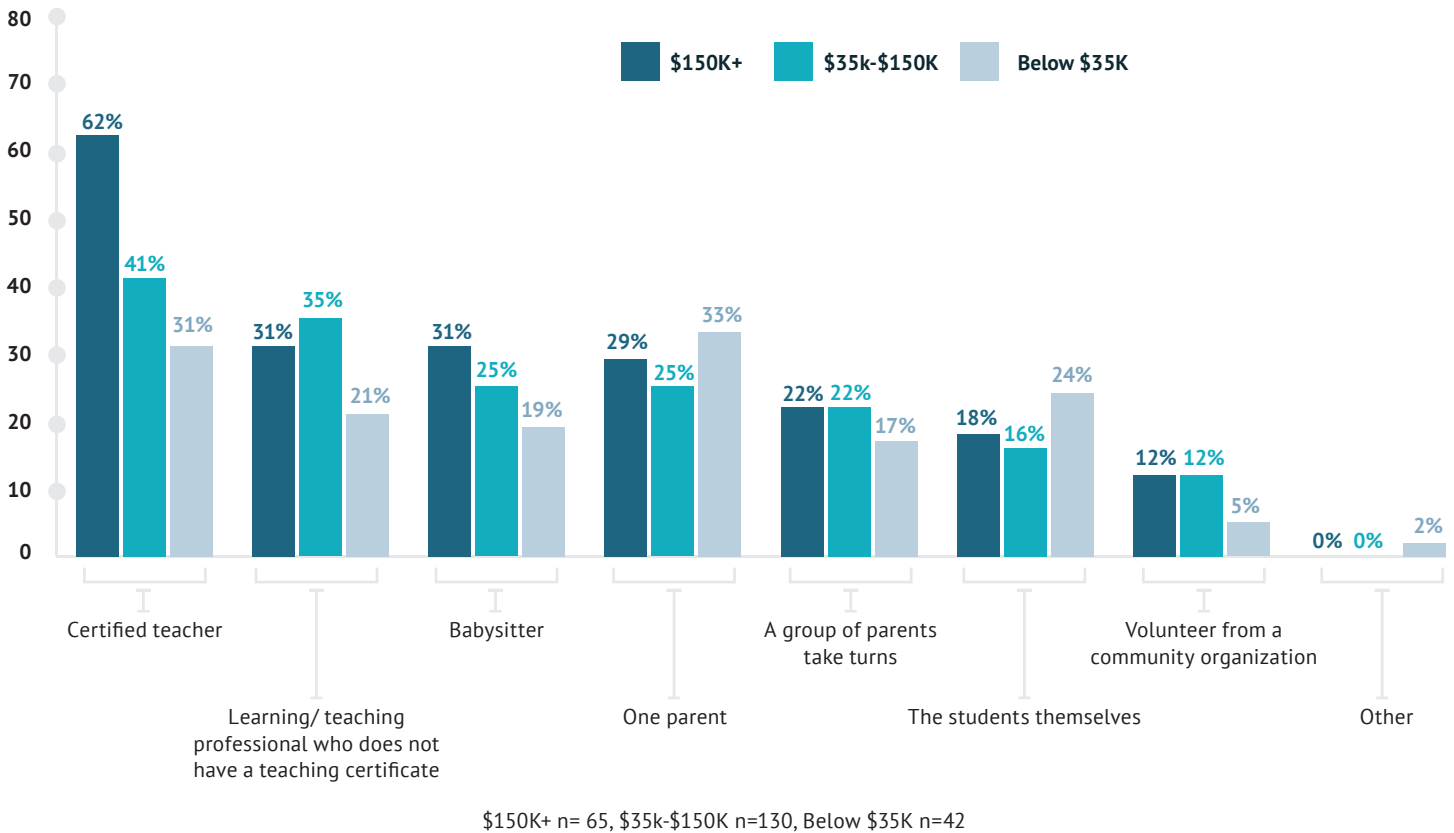
Respondents selected the top two reasons why they used a learning pod



\$150K+ n= 65, \$35k-\$150K n=129, Below \$35K n=42

PRIMARY FACILITATOR OF LEARNING PODS, BY INCOME

Respondents selected all options of those who have teaching or supervisory responsibility



PARENTS SPENDING MORE ON EDUCATION, BUT IN NEW WAYS

When many parents realized their children were struggling with remote learning, their spending on education increased.

Overall annualized parent spending on education in the fall of 2020 – both for non-public schools and out-of-school activities and products – was estimated at \$232 billion, an increase of nearly \$20 billion or 10 percent. The primary driver of this expansion was investment in supplemental learning pods, a relatively new segment that grew dramatically and accounted for an estimated \$70 billion in annualized spending. Parent investment in homeschooling also saw a sizable increase, growing nearly 70 percent from \$7 billion to \$12 billion, with middle- and lower-income parents driving this growth.

While some, primarily higher-income, parents increased their spending for out-of-school educational activities and products, more parents decreased their spending or stopped using activities or products altogether, resulting in a net decline of nearly \$4 billion in the category. The magnitude of the drop varied across income levels; during COVID-19 nearly 80 percent of children in families at higher-income levels were still participating in some out-of-school activities, while only 60 percent of children in lower-income families participated. This reduction in participation – which includes sports and social and academic enrichment activities – has the unfortunate possibility of having an impact both on children’s social emotional wellness and academic achievement. Our study found that parents whose

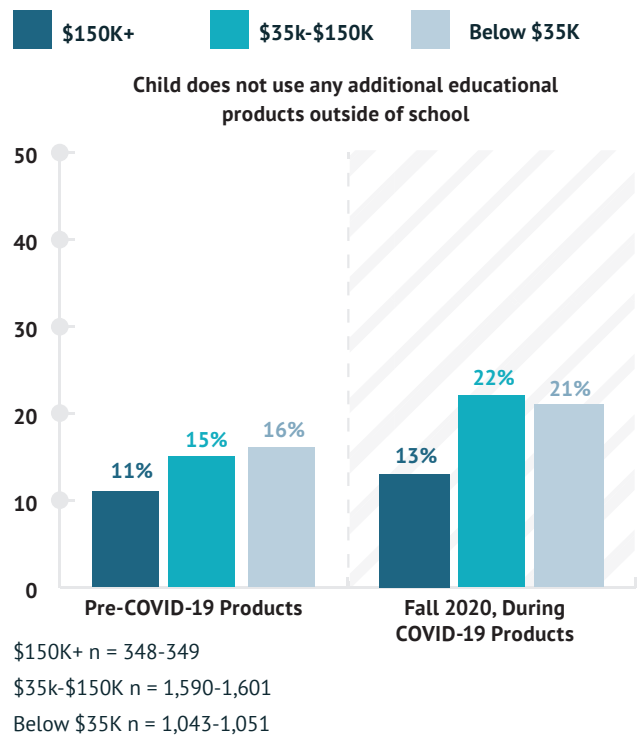
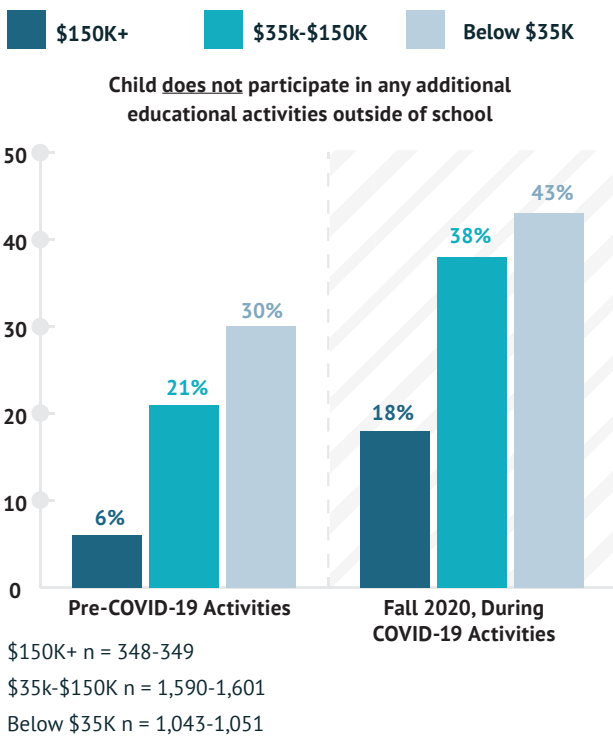
children participated in out-of-school activities or made use of out-of-school products reported more positive educational experiences for their child during COVID-19 than other parents.

In addition, the lack of participation in out-of-school activities may have had an impact on children’s academic and social and emotional growth. While research on the 2020-2021 school year has not yet been done, a December 2020 study by the Brookings Institute, showed learning loss with students in grades 3-8, demonstrating a significant drop in math achievement.⁵ A McKinsey & Company study from the same timeframe revealed similar results with students, on average, starting school in the fall of 2020 about three months behind in math and one-and-a-half months behind in reading.⁶ Others are warning about the impact on students’ social and emotional health. A March 2021 study by the U.S. Centers for Disease Control and Prevention concluded that virtual instruction poses more risks to the mental health and wellness of children and parents than in-person learning.⁷

“He is taking classes online only and is unable to participate in church and school extracurricular activities, that generally give him so much enjoyment. His interest in learning has declined as a result, he has a harder time focusing on work and is really struggling.”

– K-12 Parent

LACK OF PARTICIPATION IN OUT-OF-SCHOOL EDUCATIONAL ACTIVITIES AND PRODUCTS, BY INCOME, BEFORE AND IN FALL 2020, DURING COVID-19



5 <https://www.brookings.edu/blog/brown-center-chalkboard/2020/12/03/how-is-covid-19-affecting-student-learning/>

6 <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/covid-19-and-learning-loss-disparities-grow-and-students-need-help#>

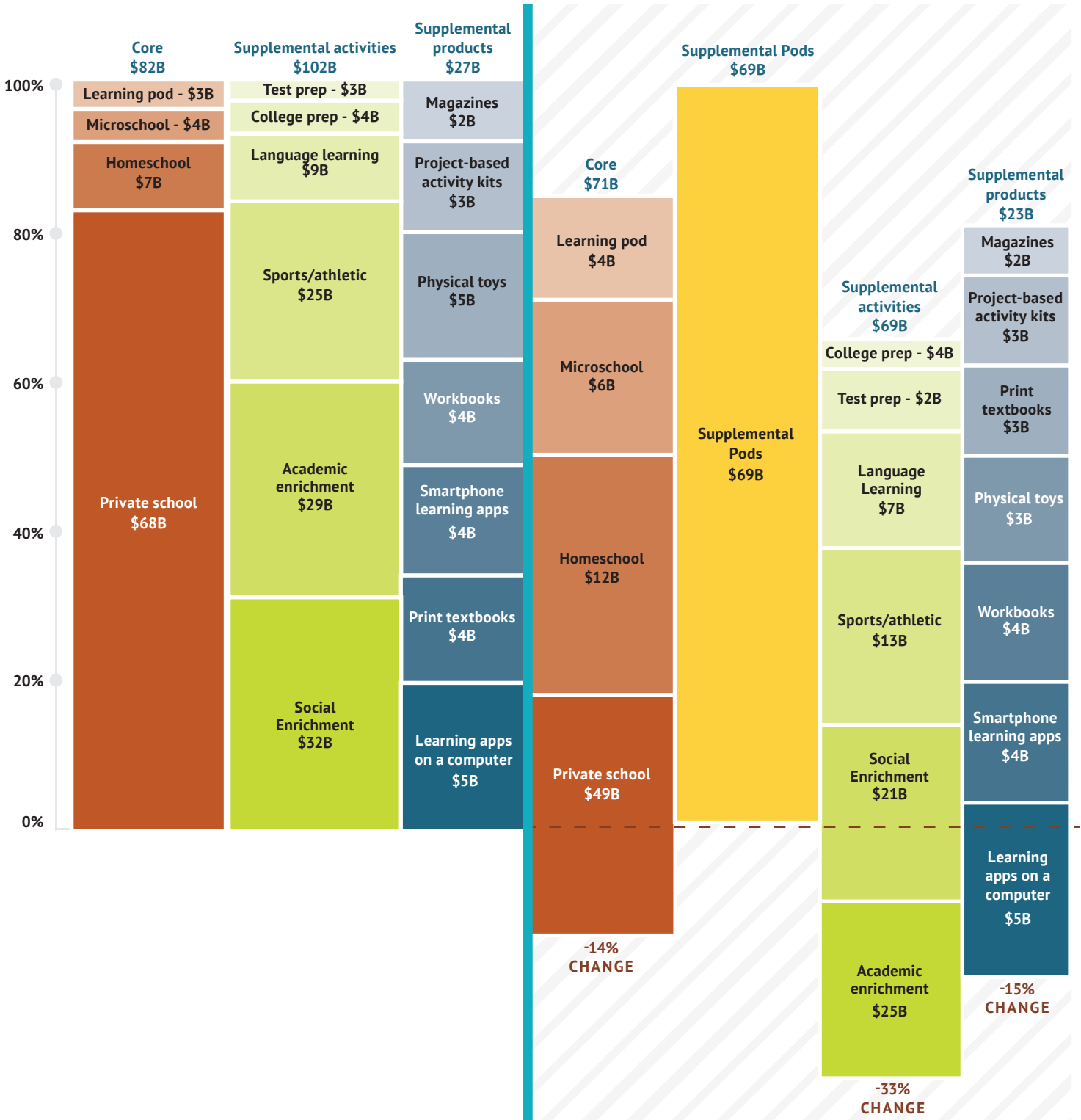
7 https://www.cdc.gov/mmwr/volumes/70/wr/mm7011a1.htm?s_cid=mm7011a1_w

PRIVATE PAY K-12 SPEND BEFORE COVID-19

Total = \$211B

PRIVATE PAY K-12 SPEND FALL 2020, DURING COVID-19

Total = \$232B



SECTION #2

Rising inequities, and the key barriers and challenges facing lower-income parents

While the perceived impact of COVID-19 on a child's educational experience varies widely, twice as many higher-income parents perceived it to be positive as compared to lower-income parents. The magnitude of positive or negative impact reported by parents is a function of a broad array of factors that shaped each family's circumstance. However, some similarities surfaced across the board.

Five factors emerged that correlated with parents' reporting a better impact on their child's educational experience during COVID-19:

- ✍ Switching schools at the onset of COVID-19
- ✍ Receiving primarily in-person learning and instruction
- ✍ Attending a private school, microschool or learning pod as the main form of schooling
- ✍ Participating in a supplemental learning pod in addition to school
- ✍ Participating in out-of-school activities or using out-of-school products

Although these factors, independent of one another, are correlated with the perception of better outcomes, many children benefited from exposure to some combination of them, exacerbating the differences among parents assessing the caliber and quality of their children's educational experiences through the middle of the academic year. The factor that had the greatest impact on parents' view of their child's experience was whether they chose to, and were able to, switch their child's school.

The inequities are stark when one looks at which children are switching schools, receiving in-person learning, accessing certain school options, and leveraging out-of-school educational activities and products. These imbalances seemed to be most impacted by income level, not race or ethnicity. Higher-income parents had the most agency and ability to switch their child's school, changing at rates 2.5 times higher than lower-income parents. Higher-income parents were also 20 percent more likely to enroll their child in out-of-school activities. In addition, supplemental learning pods used in conjunction with a child's main school was an option used more widely amongst higher-income parents, and they also turned to microschools at higher rates.

IMPACT OF COVID-19 ON A CHILD'S EDUCATIONAL EXPERIENCE, BY THE FOLLOWING FACTORS

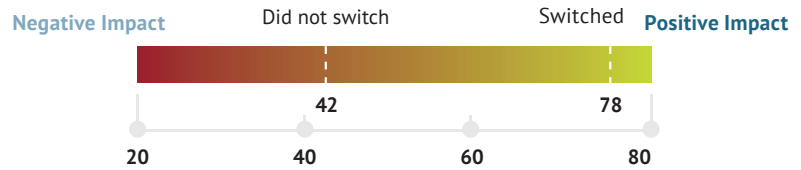
Respondents were asked to indicate on a slider how the COVID-19 pandemic has impacted their child's education experience; 0 being strongly negatively impacted and 100 being strongly positively impacted

Scores reported are the median score for survey respondents who fall in that category

Did you switch your child to a different school as a result of the pandemic?

Switched n = 438

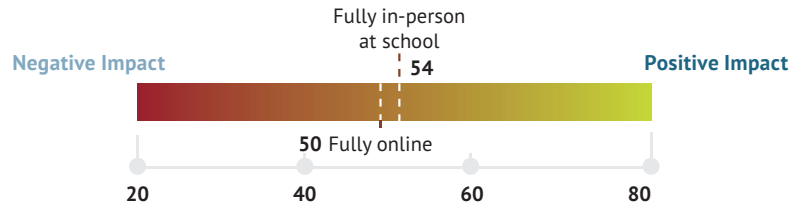
Did not switch n = 1,711



What best describes the format of the school in which your child received most of their education through November this Fall?

Fully in-person n = 691

Fully online n=1,088



Please tell us about your awareness of the following school types, and indicate which one(s) your child is using during the pandemic.

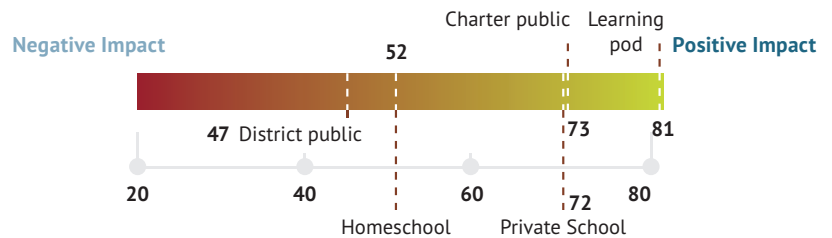
District public n = 2,240

Charter public n = 461

Private n = 353

Homeschool n = 247

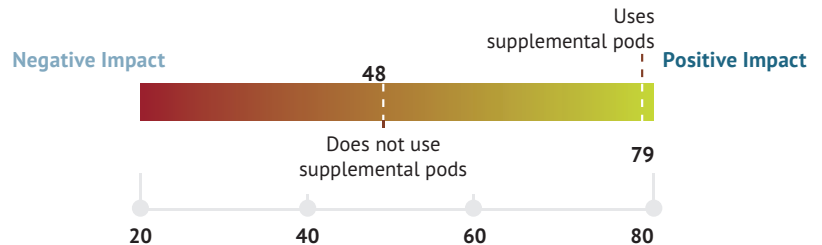
Learning pod n = 142



Have you unenrolled your child from the core school they were attending when they joined the learning pod?

Use supplemental pods n = 183

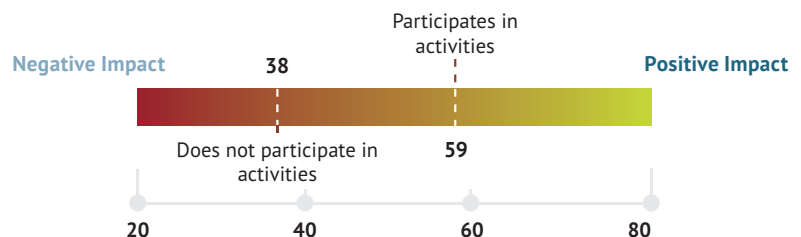
Does not use supplemental pods n = 2,646



Since the pandemic began, what types of additional educational activities did your child participate in? Select all that apply.

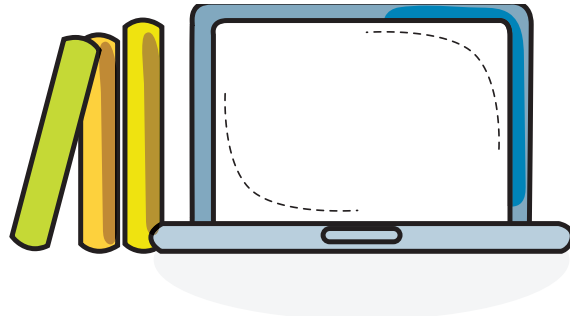
Participates in activities n = 1,773

Does not participate in activities n=1,056



AWARENESS, ACCESS AND THE IMPACT ON EQUITY

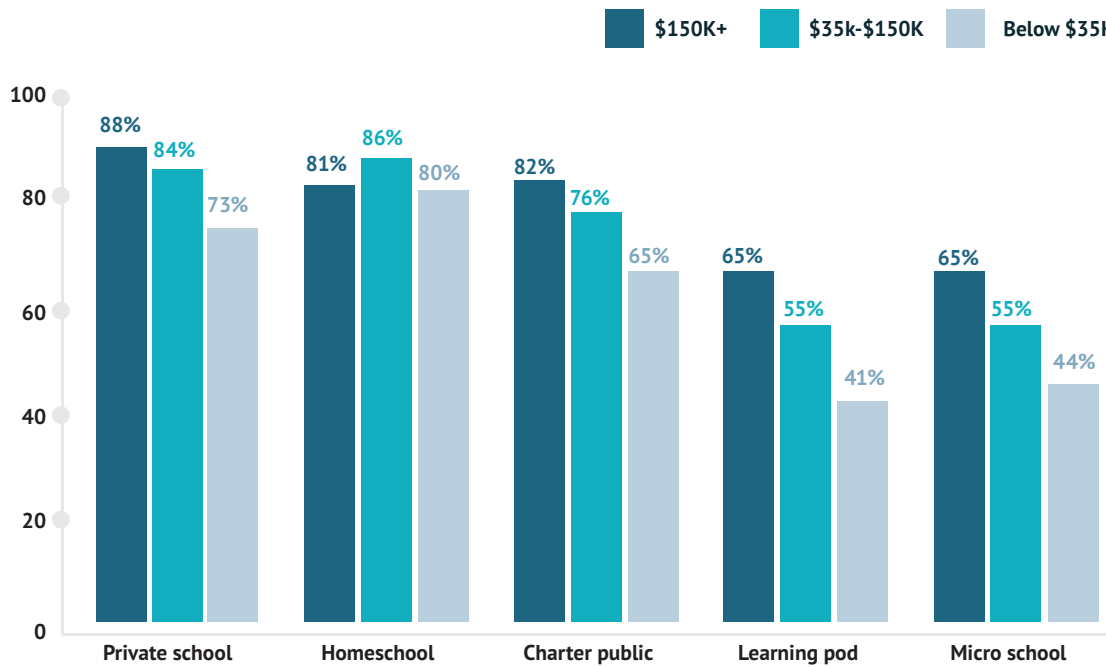
Parents strove to make the best choices available to ensure their children had positive and safe educational experiences in the midst of school closures. However, key challenges, such as awareness,



financial resources, and access, remain significant barriers for many across the country, hindering parent agency and limiting participation in alternative and emerging learning models. For example, lower-income parents were 2.5 times more likely to feel that they did not have alternatives to their child’s school compared to higher-income parents. In fact, nearly 60 percent of lower-income parents reported they were unaware of learning pods and microschoools as options, compared to, on average, 40 percent for parents at middle- and higher-income levels.

Further, familiarity with their child’s current school was the top reason for not switching. This factor ranked higher than lack of information or support to make a choice. Combined with low awareness of alternatives to traditional public school, this suggests parents may not be considering the full set of school types potentially available to them. As we continue our research, we will learn more about the factors that led parents to feel the constraint of not having viable options, and resources that could ease these constraints in the future.

AWARENESS OF SCHOOL TYPES BY INCOME



\$150K+ n = 348
 \$35k-\$150K n = 1,580
 Below \$35K n = 1,038

SECTION #3

Durability and persistence of changes beyond COVID-19

With an established baseline for what has happened to the K-12 education ecosystem since the beginning of the COVID-19 crisis in March 2020, the ensuing questions focus on the future. Are learning pods here to stay? Will increased parent involvement persist beyond the pandemic? How will attitudes about public education and its alternatives evolve? While these remain open questions, insights from our initial feedback from parents across the country have allowed us to refine the hypotheses we are testing.

In particular, initial data allows us to postulate on the durability of the COVID-19-driven shifts in the K-12 ecosystem. There is mounting evidence these changes may have been stop-gaps for many parents who were looking for in-person learning for their children. Many parents seem to have switched schools or used supplemental learning pods in a search for in-person instruction. In fact, parents reported that the top factor influencing their decisions about the upcoming 2021-2022 school year is the future state of the pandemic. This suggests this year's decisions may be temporary in response to events related to COVID-19. As schools reopen and the vaccine rollout continues to escalate, parents may feel more comfortable reverting back to their pre-pandemic schools.

In addition, parents across all income levels made significant sacrifices for their child's education this year, and these sacrifices may not be sustainable. Nearly 80 percent of parents whose children participated in non-public school options during this year reported an impact on their lifestyle, including working different hours, needing more time to drive their child to school, using savings meant for another purpose or changing jobs. Having to change working hours and dipping into savings were reported as having the greatest impact on parents' lifestyles. Parents who used learning pods, either as their child's primary form of schooling or as a supplement, reported a stronger negative impact on their lifestyle than parents whose children participated in any other school type during the pandemic.

For alternative and emerging models like learning pods, we know that setting up and managing these models can be difficult; 89 percent of parents using learning pods reported that they encountered challenges. The most widespread were difficulties finding qualified people to facilitate instruction and other families to join the learning pod. Similarly, homeschooling presents unique challenges to parents who must structure their child's school day and provide the supervision and support needed to ensure a quality educational experience. This may cast doubt on the likelihood certain learning models, particularly those more informal in nature, will persist, at least at their current rates, after the pandemic.

“ I believe overall her education has improved because remote learning is a better environment for her specifically. We may move to homeschooling once remote learning ends, depending on how she does the rest of this year.






– K-12 Parent

At the mid-term of the 2020-2021 school year, nine (9) percent of parents said they did not know where their child would go to school next year. If this figure holds, it represents approximately five (5) million K-12 student enrollments, a potential outflow that will undoubtedly hit some schools and districts harder than others. Among the top factors influencing parents' decisions about next year is their child's experience this year.

Even if parents revert to traditional brick-and-mortar schools for the 2021-2022 school year, the learning pod phenomenon may continue to be a part of the K-12 ecosystem. For some children, learning pod participation might replace – or converge with – after-school programs or out-of-school activities, such as traditional supplemental tutoring, as parents return to their offices and require childcare outside of the regular school day. Other parents might continue to keep their child in a learning pod as an alternative to traditional schools. Perhaps learning pods as we have come to know them this year will fade completely, with the increased level of parent involvement and expectations experienced this year seeping into other areas of K-12 education. Just as the growth and acceptance of alternative models changed the K-12 landscape during the pandemic, the ecosystem – and parents' decision-making – will continue to evolve in the wake of it.

LOOKING AHEAD TO THE NEXT PHASE OF RESEARCH

As we explore the permanence of rising alternative models, and how parent agency and expectations may evolve as a result of COVID-19, we will use parents' motivation and experience during the 2020-2021 school year to inform our outlook for the future. To develop this perspective, we are actively exploring the following issues:

-  Motives and concerns that drove parents to make the choices they did for the 2020-2021 school year
-  Constraints that influenced their choices
-  Ways in which expectations and priorities for education shifted this year
-  Parents' satisfaction with their child's educational experience this year relative to priorities and goals
-  Parents' future plans, attitudes and needs as it relates to their child's education

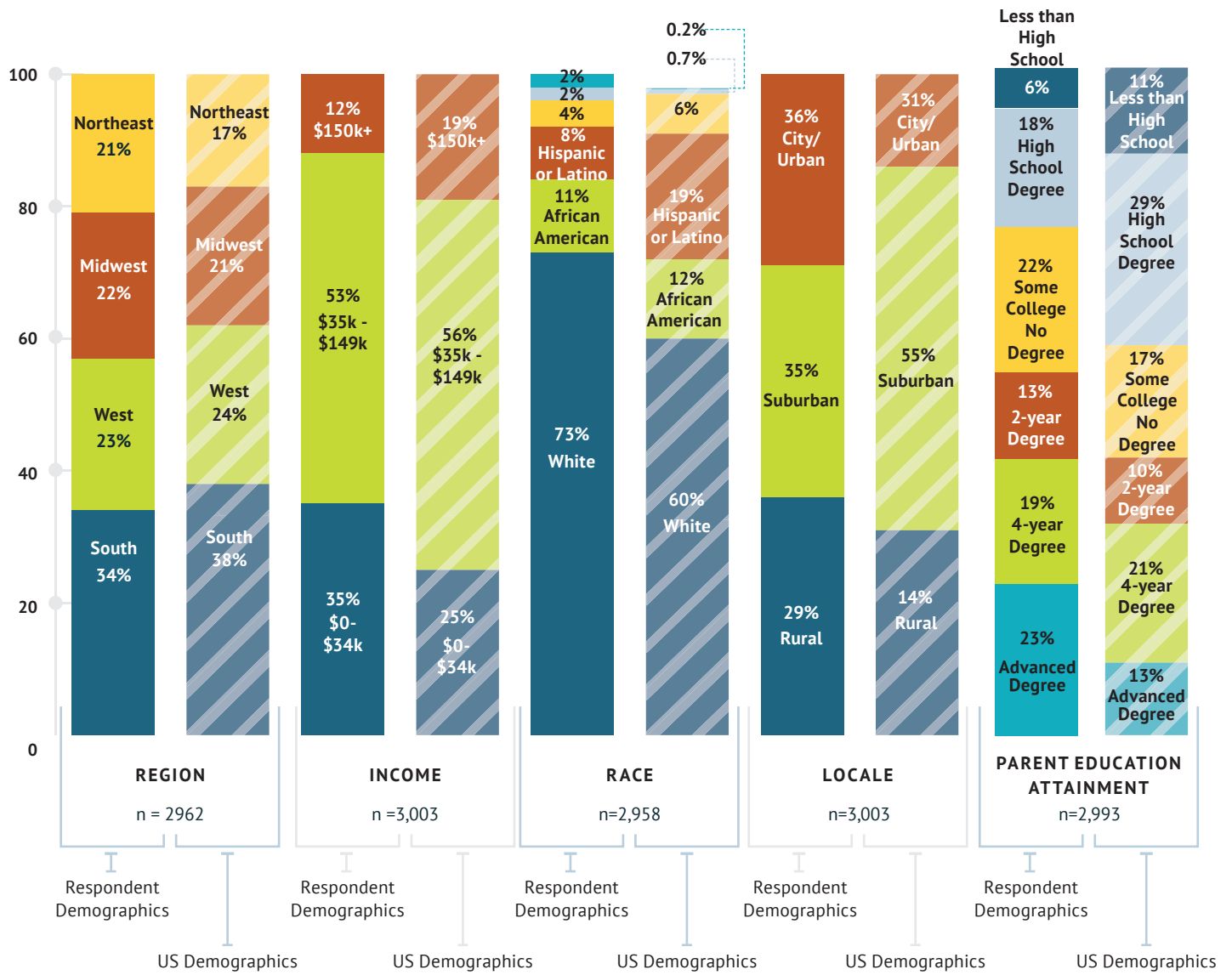
We launched our second outreach to parents in March 2021 and will share those findings by early summer; a third survey will follow, with a publication released towards the end of the summer. Across subsequent research, we will also explore the durability of the supply-side of the alternative model ecosystem, including microschool providers, and the cacophony of existing and emerging organizations supporting parents in standing up learning pods.

In the spirit of moving the field forward, we welcome conversations and ideas you may have as we continue our research around parent agency and the disruption, innovation, and inequities across the K-12 ecosystem in the time of COVID-19.

Appendices

APPENDIX A: STUDY METHODOLOGY

SURVEY DEMOGRAPHICS



- Asian
- American Indian or Native American
- Native Hawaiian or Pacific Islander

Phase 1 of the survey was launched and administered by Qualtrics, using an online panel to source survey participants who were targeted on demographic information, such as race, location, age, etc. Tyton Partners used this capability to set quotas around demographic criteria to ensure the sample is representative of the United States population in key dimensions. Quotas ensured that responses would be distributed appropriately across the following:

Income levels

Region

Locale (e.g., urban, suburban, rural)

Child grade level

Respondents were also provided with the option to take the survey in Spanish.

Qualtrics works with various panels to try to minimize biases that any particular panel might have; for this survey, they worked with five panel partners. Individual panel respondents are generally compensated through a “point-reward” system. Respondents get points based on the length/complexity of the survey, and points can then be redeemed for various types of gift cards.

APPENDIX B: MARKET SIZING METHODOLOGY AND ASSUMPTIONS

Market sizing methodology

BEFORE COVID-19, SCHOOL TYPE

1. K-12 public, charter, private and homeschool enrolment estimates for 2019-20 were taken from NCES, for the before COVID-19 enrollment estimates. Survey data was used to estimate learning pod and homeschool before COVID-19 enrollment.
2. Survey school type breakdown by income was applied to 2019-20 enrollment totals, to arrive at estimated enrollment share by income. These enrollment shares were then applied to the portion of the U.S. population falling within each income bracket to arrive at total enrollment by income.
3. Survey data on spend before COVID-19, by income and school type, was used to calculate average and total spend.

DURING COVID-19, SCHOOL TYPE

1. Changes in participation by school type and income were applied to pre-COVID-19 enrollment estimates by income, to arrive at during COVID-19 participation.
2. Survey data on spend during COVID-19, by income and school type, was used to calculate average and total spend.
3. Use (of school types and out-of-school products and services) and spending patterns during the Fall of 2020 were extrapolated to the full academic year to arrive at '20-'21 annual spend estimates.

OUT-OF-SCHOOL PRODUCTS AND SERVICES

1. Survey data on use of out-of-school services and products, by income, was used to arrive at participation rates by income. These participation rates were applied to the share of the U.S. population falling within each income bracket to arrive at total enrollment by income.
2. Survey data on spend during COVID-19, by income and product or service type, was used to calculate average and total spend.