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Research Agenda

Expanding Equitable Access to Flexible Learning Options

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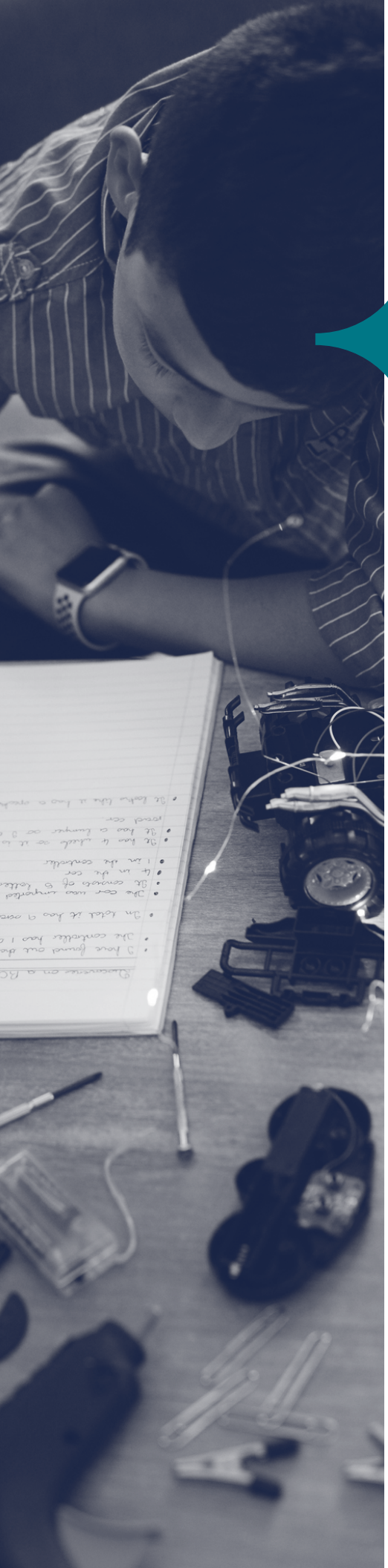

Introduction

Since 2021, Bellwether has conducted research on flexible learning options, including interviews with 85 policymakers, state administrators, funders, navigation organizations, technology providers, and many others. The goal was to address several questions in a nascent and fast-growing field: How do families and students access learning within a dynamic ecosystem of options, and what challenges do they experience? How can navigation organizations help families and students access learning options that meet their needs, interests, and aspirations? What barriers do families and students encounter when trying to leverage public funding to participate in flexible, personalized education?

Two Bellwether grant programs — the Filling the Gap Grant Program and the Assembly Grant Program — supported organizations working to eliminate logistical and policy barriers for families seeking access to flexible learning options. The Charting a Course series summarizes learnings and offers a road map for decision-makers on how to strengthen navigation services for K-12 students. Throughout Bellwether's research, however, new lines of inquiry emerged:

1. The definition of learning options, or characteristics of learning options, that offer flexible, personalized education.
2. More detailed analysis of the demand and supply of learning options.
3. How barriers and solutions to access affect specific geographies, students, and learning options.
4. How providers and families define and measure whether/how learning options support students' success.
5. How increased participation in flexible learning options impacts communities.

Articulating these questions in a research agenda will allow Bellwether and other organizations to more effectively gather data, build evidence, and share knowledge to inform public officials and others in decision-making roles.

1. Researchers can define learning options, or characteristics of learning options, that provide for flexible, personalized education.

There is a wide range of learning options in terms of aims, design, modality, and other factors. While this diversity can help families match students' unique needs and spur innovation among the field of providers, it poses a significant challenge for those attempting to study these options.[1] For example, the field lacks a shared definition of a microschool, which limits researchers' ability to answer basic questions about enrollment in microschools across the country or their varying characteristics — information essential for families searching for their child's perfect fit. While some definitional work has been done on microschools, as well other flexible options like hybrid home-schools or career exploration programs, additional research is still needed.[2]

That said, rigid definitions can also disincentivize innovation and evolution. When researchers define a learning option too precisely — and those definitions inform public officials and other decision-makers — it creates incentives for providers to align their models closely to that definition rather than continuously modify their models in response to evolving student needs, new information, or changes in context. Depending on how the definitions are created, it can also predispose researchers to look for options that fit their definitions and miss opportunities to capture the full diversity of what is available, including innovative outliers.

The following research questions aim to surface the definitional information researchers need to explore to address questions about demand, barriers to access, and quality in ways that do not stifle continued evolution and innovation.

- **What program components define different types of learning options?**
- **What are the aims within and across different types of learning options?**
- **What typologies can be developed to classify learning options? Which learning options do not fit neatly into those typologies?**
- **What processes can researchers and others use to continuously update definitions in response to an evolving landscape?**
- **How do statutes and regulations apply to learning options, as defined, and how do they enable or hinder their existence and scalability?**

To inform public officials and other decision-makers, researchers can conduct thorough **landscape analyses** that survey the ecosystem of learning options. Some organizations have already begun to do so on a national scale.[3] State-level analyses would also be helpful to inform **policy analyses** that help public officials determine how existing or potential policies and regulations would govern, constrain, or enable different types of learning options.

What are learning options?

Learning options include any experience — whether provided by a school, community-based organization, local business, college or university, or online operator — designed to support students' growth and development. Schools of choice (e.g., private and charter schools) are considered a main source of learning options for families. But learning options also include a broader array of more flexible, modular experiences that families seek, including tutoring programs, academic clubs, and community sports. These options and other extended learning opportunities often provide less than a full school experience on their own but can be combined with other options to create a comprehensive education. Learning options can supplement or supplant a student's traditional school experience.[4]

2. Researchers can help answer questions about the demand and supply of learning options.

The COVID-19 pandemic accelerated families' desire for learning options aligned with children's unique needs, interests, and goals.[5] Researchers have sought to understand this demand at a national level, primarily through surveys in which many families express dissatisfaction with their child's current education and a desire for more personalized opportunities within and outside of school; this survey research also provides insight into what learning options families are already pursuing or are most interested in pursuing, with some demographic breakdowns.[6] Research on enrollment trends further shows that more families have decided to enroll their children in private schools or home-school.[7] What is less clear is how family demand plays out in state or local ecosystems.

It is also unclear whether and how the current supply of learning options is aligned to family demand. There is limited, if any, research into how providers meet the needs of the families they aim to serve or adapt their offerings over time as families' needs evolve. There is a similarly limited research base on patterns and/or trends in the specific types of learning options families do or do not choose.

The following research questions focus on building evidence to help public officials and other decision-makers understand the current state of demand and supply of learning options.

- **What motivates families to choose different learning options? How do motivations vary by region, race or ethnicity, income, or other factors?**
- **How do demand and supply vary by family and student demographics (e.g., socioeconomic status, race or ethnicity, geographic location, and/or student age) and other factors (e.g., student interests, academic and nonacademic needs, past experiences with education, and/or level of flexibility sought)?**
- **How do demand and supply vary across different types of learning options?**
- **What do data from direct funding programs indicate about the demand and supply of different learning options?**
- **How should recruitment and awareness campaigns respond to the needs and preferences of families and the types of providers and programs they want?**

Gaining a clearer picture of these and other details will help public officials and other decision-makers answer vital questions. **Survey research** and **enrollment analyses**, especially those that elucidate how families' priorities and behaviors vary across demographic characteristics and over time, can help produce a more complete, nuanced picture of the demand for flexible learning options. **Landscape assessments** and **market research** can produce corresponding information on the supply of providers, which would help public officials ensure that policies related to things like per-pupil funding amounts and the types of learning options available are aligned to what families want and need.

Understanding more about demand and supply is particularly important given the growing popularity of programs that use state funding to help families afford learning options in the form of education savings accounts, microgrants, or tax credits or deductions.[8] Information on both demand and supply can help public officials and other decision-makers tailor resources, such as funding for outreach and support, to mitigate misalignment between supply and demand.

3. Researchers can assess how barriers and solutions to access learning options manifest for different geographies, students, and learning options.

Bellwether's research has identified a set of broad challenges that many families face when trying to access flexible learning options, including but not limited to financial constraints.[9] State direct funding programs are intended to increase affordability but can present their own challenges. Many families are not aware of these programs or do not trust them, and logistical issues and restrictions on eligible expenses can also create a complex system "not really built for the average person to understand."[10] These barriers can prevent families from accessing the options they need or even deter families from pursuing learning options altogether.

Addressing these barriers requires a more systematic understanding of how they manifest in different contexts and communities. Early research has built on analyses of families' experiences with school choice policies[11] and relied on national surveys[12] as well as successes and challenges from navigation organizations.[13]

Addressing the following research questions can help public officials and others understand which barriers affect specific student communities[14] and what kinds of solutions might help.

- **How do barriers to access vary across geographies, policy environments, family and student demographics, and other factors?**
- **How do barriers to access vary by the type of learning option?**
- **How can public officials help address logistical barriers to access, such as transportation? What is the role for private-sector actors?**
- **How can public officials help ensure families have access to neutral, high-quality navigation support?**
- **How can artificial intelligence (AI) support the scale and sustainability of navigation solutions? How might AI affect public investment in navigation in the long term?**

Better and more localized information on barriers to access can help public officials right-size and direct resources to the most pressing issues impacting families. **Case studies** and qualitative research, including **surveys**, **interviews**, and **focus groups**, can help paint a picture of how barriers to access unfold in different state and local contexts. With more information, public officials have opportunities to design and revise provisions in state law and invest public resources in solutions aligned to the barriers faced in their communities.

When it comes to the development of solutions designed to eliminate or reduce barriers to access with flexible learning options, **program evaluation** can also be a useful tool, including the development of theories of change and logic models that describe how a solution is intended to work. **Human-centered design**, which centers users' needs and experiences to define problems and develop solutions, is also a useful approach.[15] Regardless of the method, more information on the efficacy of various approaches to addressing barriers to access can help public officials and private actors implement solutions tailored to the largest barriers in their context.

4. Researchers can evaluate whether or how learning options support students' success.

Equitable access to flexible education means all families have access to high-quality learning options. Like the definitional questions around learning options themselves, however, "quality" is also difficult to define and measure. Learning providers use a wide variety of tools to measure student learning, from standardized assessments to portfolios of student work.[16] But the definition of "high-quality" must include more than just standard academic outcomes.[17] Moreover, what families consider to be "high-quality" may vary at the group level (e.g., all families exiting the public school system) or the individual level (e.g., a family seeking a learning option aligned to a particular student need), or depend on whether families are leveraging learning options to supplement or supplant traditional schooling. Often, families are looking for experiences that fulfill nonacademic needs, such as socioemotional supports, cultural exposure, students' sense of agency, or career preparation.[18]

Creating a typology of learning options is an important step in understanding their impact on student success. But even then, this work will be challenging given the varied goals, modalities, and contexts of learning options.[19] Very little research has been done to unpack or compare the quality of learning options in ways that are responsive to families' needs and preferences and/or can inform public policy.

Addressing the following research questions will help build a stronger infrastructure for researchers to engage in these types of analyses.

- **How do learning providers and the families they serve define success for students?**
- **How do different learning providers measure and communicate their impact on students' success?**
- **What information do learning providers offer families about their students' progress, and how does it compare to the information families want to know?**
- **What are innovative ways that learning providers are measuring success that could inform broader discussions of testing and accountability?**
- **What can be learned from how other segments of the education sector (e.g., after-school care and career pathways programs) measure and communicate their impact?**
- **What role should public officials play in creating the conditions for studying the quality of learning, such as data collection?**
- **How should public officials use data on learning provider quality to limit or augment the supply of options eligible for public dollars?**

Measuring the quality of such a wide range of learning options will require expertise in **measurement**, **assessment**, and **survey research**. Providers can partner with evaluation specialists to help them define success for their program and the families they serve, as well as design, develop, and implement tools that measure progress toward those goals. These partnerships can help providers better understand and communicate their impact to families and students, public officials, and funders. Moreover, better understanding and evaluating the quality of learning options is critical for public officials to help expand access to options that result in positive student outcomes and have the potential to inform broader debates about the characteristics of a quality education.

5. Researchers can shed light on how flexible learning options impact schools and communities.

A shift toward more flexible learning options will affect not only students and their families but also the communities they live in. Researchers can help surface and assess these community-wide effects, and policymakers can use them to inform decisions about policies that constrain or enable flexible learning options. For instance, studies related to the impact of flexible learning on individual students could inform research about longitudinal life outcomes like employment or civic engagement. Cost-benefit analyses of funding policies related to more flexible learning options can support policymakers as they make decisions about prioritizing public resources for the existing education system versus new options, or inform research about the impact of these options on communities' long-term economic health.

Researchers can also pinpoint opportunities for greater collaboration between in- and out-of-system providers. For example, many schools partner with nonprofits, businesses, and postsecondary institutions to meet student needs. There are opportunities and challenges to expanding those partnerships, which researchers can help identify.[20]

Given the limited amount of research, to date, public officials may end up *enacting* laws that do not serve the students and families in their states well — or *not enacting* laws that could serve them better. The following research questions could help prevent either result.

- **How does participation in flexible learning options affect students, schools, and communities? How does it affect academic outcomes or long-term socioeconomic and civic outcomes?**
- **What are the costs and benefits of policies that enable access to flexible learning options but could reduce funding available for public education systems?**
- **In what ways have districts and schools collaborated with flexible learning option providers? What can the sector learn from these examples? What are the barriers to collaboration?**
- **What are the short-, mid-, and long-term outcomes of flexible learning options for students and communities? How can leading indicators inform public officials' and other decision-makers' work?**

Many of these questions are best answered through a combination of **implementation evaluation** and longer-term **impact evaluations** that allow for examining outcomes over time. **Cost-benefit analyses** and **financial modeling** can help public officials better predict the fiscal impact that more flexible learning options will have, including the ways in which flexible learning impacts public education systems and state budgets and economies. This research can help public officials and state administrators assess how to design and implement policies that minimize the costs and maximize the benefits of supporting the expansion of flexible learning.

Enabling conditions for research

Before researchers can begin to address these expansive, long-term questions, the field will need to create the conditions for more and better research. Three related factors limit current research. First, the field is not aligned on the definitions of flexible learning options. Given that the concept is still relatively new, it is unsurprising that efforts to define it are nascent. As discussed in Research Question #1, the lack of definitional clarity makes it difficult for researchers to ask the downstream questions proposed in this research agenda.

Second, information and data about which learning options exist in communities, how many students they serve, and their approaches and goals are scarce. Intermediaries might keep lists of providers in their regions, and websites such as GreatSchools.org aggregate information about school options.[21] But when it comes to flexible options, the data infrastructure is profoundly lacking. There are few local databases of providers, much less a national one, and it is difficult to collect even basic logistical data such as schedules, points of contact, and costs.[22] Gathering more comprehensive data about learning options will require deep partnerships among researchers, providers, intermediaries, technology platforms, and funders. Leveraging data that has already been collected by navigators and technology platforms, as well as new technologies such as AI, can accelerate data collection and analysis but requires overcoming significant barriers of interoperability among systems.

Third, while randomized controlled trials are often considered the gold standard of research methods, they are not always possible or preferable. This is the case for learning options that often serve small numbers of students, are nascent, and tend to evolve quickly. Instead, mixed-method approaches can provide valuable information about learning options and inform the iterative process. More research on flexible learning options will require decision-makers to engage with different methods and to have the agility to make decisions with an emerging body of research.

Tackling the entirety of the flexible learning ecosystem will be a daunting task. Researchers would benefit from focusing first on a subset of providers (e.g., those in a local ecosystem, those that accept public funding, or specific models for which there is high demand from families). Prioritizing certain subsets of providers can help to build the infrastructure and enable conditions for future data collection while also offering useful information for decision-makers.

Conclusion

Many of the questions in this research agenda are broad and sweeping, and many may never have definitive answers. Nevertheless, concerted, coordinated efforts to address these questions can help identify the right levers and incentives to enable access to high-quality, personalized learning opportunities for students. Addressing these research questions can also support public officials and other decision-makers to evaluate the best ways to allocate resources to drive students' success, use data to communicate the impact of learning options to advocates and other stakeholders, and identify opportunities to amplify the effect of learning options on students, schools, and communities. ✦

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Endnotes

1 For a sampling of innovative models that meet a variety of needs and can inspire other providers, see *The Innovative Models Exchange*, Transcend Education, https://exchange.transcendeducation.org/models/.

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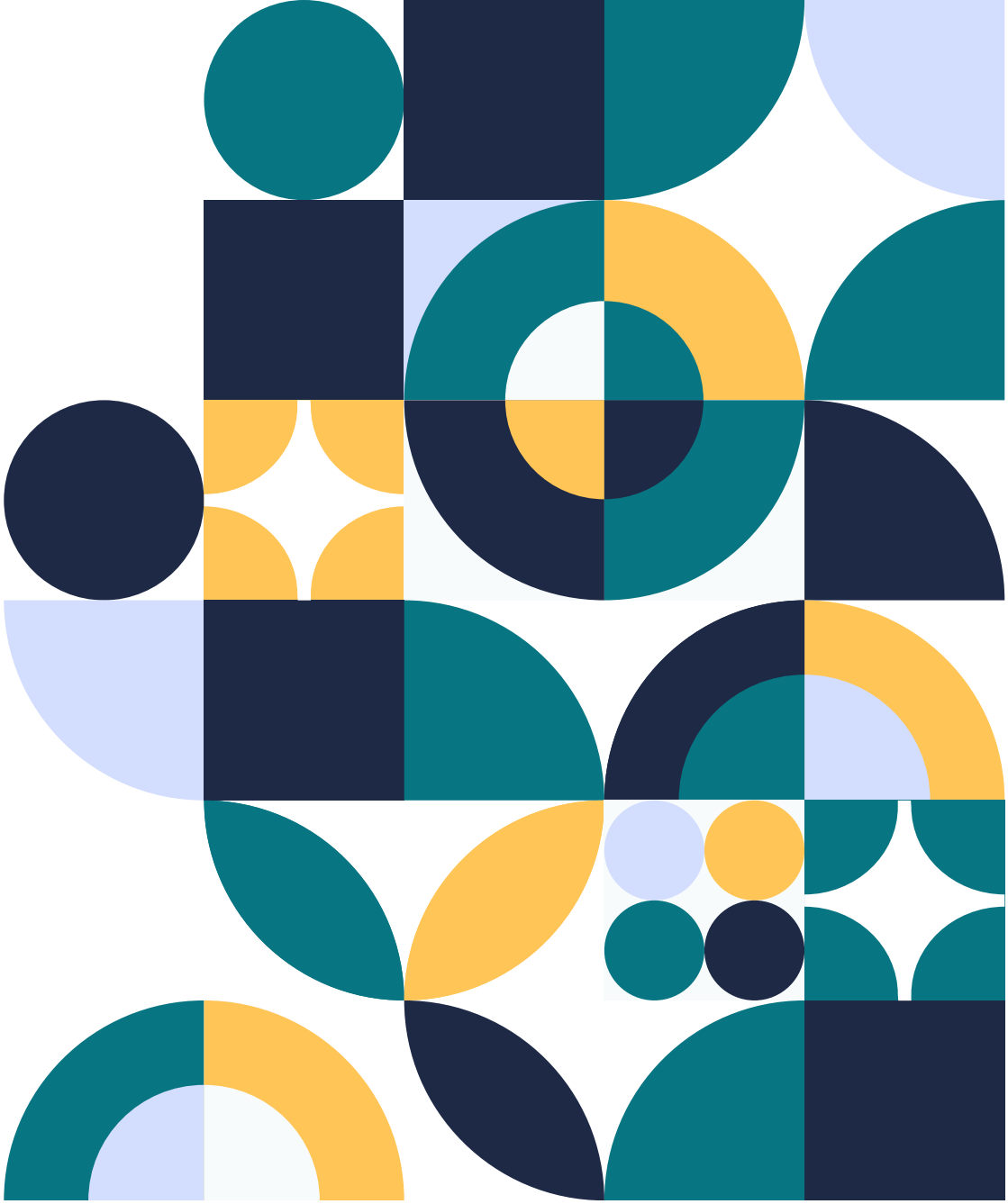

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