

ABSTRACT

Andrew Harris, TOWARD A BALANCED DEMOGRAPHIC: A CASE STUDY OF PARENTS' PREFERENCE FOR RURAL CHARTER SCHOOLS (Under the direction of Dr. R. Martin Reardon) Department of Educational Leadership, February 2018.

Against a background of failure on the part of the focus of this case study to adhere to its founding charter in terms of enrollment, the purpose of this study was to explore how and why rural parents choose charter schools over traditional public schools. Using data collected through individual and focus group interviews, field observations, and source documents from a new rural public charter school, this case study examined the choice process employed by parents of the school's target and non-target populations through the lens of a hybrid school choice decision making model. Parents considered a variety of student, school, and community factors when making their school choice decisions. Negative influencers included difficulties accessing school transportation, facilities conditions, and a fear of leaving friends. Though parents cited specialized programming as playing a role in their decision to enroll their children at the rural charter school, a positive school climate characterized by a "culture of care" emerged as the most powerful influencer of school choice. Implementation of a new, focused marketing mix strategy aligned to a 7Ps framework and informed by study findings led to a significant increase in the enrollment of target population students. Results demonstrate that a carefully designed marketing mix strategy can be a powerful tool to achieve demographically balanced enrollment in rural charter schools. In addition to the implications for recruitment and retention efforts of traditional and charter schools, this study highlights the profound impact of community on parents' decision making in a rural context, and it offers a new process model for future studies of school choice decision making.

TOWARD A BALANCED DEMOGRAPHIC:
A CASE STUDY OF PARENTS'S PREFERENCE FOR RURAL CHARTER SCHOOLS

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by

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DEDICATION

I dedicate this dissertation to my loving wife, Kim, and our two beautiful girls, Kinley and Adelyn. I shall never forget all that you have so selflessly sacrificed to make this work possible.

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I very humbly express my sincere gratitude to Dr. Reardon, under whose expert guidance I've learned so much. Thank you for consistently challenging me to dig deeper, and deeper still. Despite the odds, you have molded me into a scholar.

To my parents, Phil and Susan, who made education a priority over all else. Thank you for always encouraging me to go for it, and for your many sacrifices all along the way. I hope that I can be half the parent to my children that you have been to me.

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To the founding board of USCS, whose courage and service to community are the stuff of legend. Thank you for making a stand to improve the lives of children for generations to come.

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And to the parents and students of USCS. I have tried my very best to tell your stories within these pages in the hope that others may learn from you. Thank you for sharing your experiences, your hopes, and your dreams. I am forever grateful.

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CHAPTER 1: PROBLEM OF PRACTICE

In the April 27 edition of *The University Post* (a pseudonym), our newly elected city councilor said that action to establish a charter school in our county would ‘undermine and segregate existing public schools.’ I can’t understand how this incredible opportunity for our children can be viewed so negatively.

Letter to the Editor, The University Post.

More than 300 residents have signed a petition urging the University City (a pseudonym) Board of Education to choose as the next superintendent someone who “vigorously” opposes charter schools. The petition...states that “charter schools take away funding, teachers and students from public schools already straining to meet the education needs for all students, as opposed to a few.”

Petition: Choose charter opponent, The University Post.

The context of this case study is University STEM Charter School (USCS), which opened in a high-poverty, rural region of North Carolina in 2015 with a mission of preparing a diverse population of middle- and high-school students for advanced STEM (science, technology, engineering, & mathematics) careers. USCS’s founding members included a former public school district superintendent in the same high-poverty, rural region, county commissioners, business leaders, and representatives from local post-secondary educational institutions. The founding members incorporated into the original charter application their intent to target students from backgrounds that have been underrepresented traditionally in STEM fields, and college and university programs, as well as those whose parents have not earned a college degree.

To define this target population more specifically, USCS’s founders relied upon two major reports. The first of these reports, *Women, Minorities, and Persons with Disabilities in Science and Engineering* (National Science Foundation, 2013), began by stating

women, persons with disabilities, and three racial/ethnic groups—blacks, Hispanics, and American Indians—are considered underrepresented in science and engineering because they constitute smaller percentages of science and engineering degree recipients and of employed scientists and engineers than they do of the population. (p. 2)

The second report, *Increasing College Opportunity for Low-Income Students: Promising Models and a Call to Action* (Executive Office of the President, 2014), highlights the very low rates of post-secondary educational attainment among students of low socioeconomic status in the United States. Taken together, the founders of USCS defined their underrepresented target population as girls of all racial/ethnic groups; black, Hispanic, and American Indian students; students of low socioeconomic status; and students whose parents have not earned a college degree.

The Situation at the Start of My Project

Though USCS has made a concerted effort to attract students from these target groups, the student population, as will be substantiated in subsequent discussion, remains far less diverse than originally intended after its first year of operation. Further, USCS has enrolled an even less diverse student population in its second year.

Arguably, the student population of USCS does not comply with either the terms of its charter or current charter school law because of the stark difference in demography between the school's student population and that of the population residing within the local public school administrative unit (i.e., a traditional school district, referred to as TSD subsequently) in which USCS is located. To illustrate the differences between the population demographics of USCS, the local TSD, and the USCS recruiting region, a comparison of each population by racial/ethnic subgroup is shown in Table 1.

As shown in Table 1, each USCS cohort and the USCS overall student population differ from the TSD population by less than 5% for all racial/ethnic groups other than White and Black or African American: USCS's Cohort 1 contained 12 percentage points fewer Black or African American students and 11 percentage points more White students than TSD. These gaps have grown to greater than 20 percentage points, so that USCS's Cohort 2 contains approximately

Table 1

Racial/Ethnic Population Demographics

Population	W	B	O	M	H
USCS, Cohort 1	81 (66%)	29 (24%)	3 (2%)	7 (6%)	3 (2%)
USCS, Cohort 2	125 (80%)	17 (11%)	4 (3%)	4 (3%)	6 (4%)
USCS, Overall	183 (73%)	43 (17%)	7 (3%)	10 (4%)	9 (4%)
TSD	23059 (55%)	15355 (36%)	1351 (3%)	896 (2%)	1642 (4%)
Region	79156 (67%)	30493 (26%)	2869 (2%)	2113 (2%)	3487 (3%)

Note. W=White, B=Black or African American, O=Other, M=Two or more races, H=Hispanic and Latino. Region and local administrative unit data from US Census, 2010. All numbers rounded to the nearest whole number.

only half as many Black or African American students (as a percentage of the full cohort) as Cohort 1.

Failing to enroll a racially diverse student body consistent with the target population outlined in the original charter application is problematic for several reasons. Legally, North Carolina's charter schools are required to

make efforts for the population of the school to reasonably reflect the racial and ethnic composition of the general population residing within the local school administrative unit in which the school is located or *the racial and ethnic composition of the special population that the school seeks to serve* residing within the local school administrative unit in which the school is located. (N.C.G.S. 115C-118.45, italics added)

If USCS does not meet the legal stipulation italicized above regarding racial and ethnic composition, the North Carolina State Board of Education may revoke the school's charter, thereby forcing it to close.

The increasingly White student population also poses daunting political and operational challenges for USCS. Early in the planning process for USCS and prior to receiving official approval to open, many local critics actively fought the concept of a charter school effort on the very grounds that it would predominantly serve White, privileged students. City council members serving the city in which USCS is located held a vote to authorize an investigation of the mayor—a USCS founding board member—for his role in seeking to open USCS. They voted against a formal resolution in support of the school's application to the State Board of Education on the grounds that it would serve only a sub-population of city residents. The local newspaper published almost weekly accounts from local school board members, community activists, and other residents who declared the school would rob local school districts of valuable resources, while siphoning off the most talented students and the most involved parents. The anti-charter

contingent spoke openly against USCS at county Board of Commissioners meetings, Board of Education meetings, city council meetings, and other public forums across the region.

When the USCS founders were seeking to operate from facilities on the campus of the local university—an Historically Black College or University (HBCU)—the local critics again raised the issue of potential homogeneous enrollment to the HBCU’s Board of Trustees in an effort to block the school from opening. In a split decision, the Board of Trustees approved a lease of facilities for the charter school, but they did not establish a formal partnership until one year later. When the formal document outlining the partnership between USCS and the HBCU was approved by the boards of each institution, it contained language requiring USCS to actively recruit and enroll a population of students consistent with the target population outlined within its original charter application. Until USCS meets this requirement, the relationship between itself and the HBCU will be problematic. Since there are no other facilities in the region that are both suitable for educational use and spacious enough to accommodate an expanding charter school’s needs, a breach of agreement between USCS and the HBCU could result in the school’s closure due to lack of operating facilities.

Trends in Charter School Student Demographics

The issue of charter school student demographics is not only a problem for USCS, it is a major issue for the charter school movement both at the national and state levels. This emerges from the work of the Civil Rights Project (CRP, housed at the University of California-Los Angeles) which has been analyzing the issue of school segregation in the United States for more than 14 years. One of the key concerns voiced by the CRP is that “the rapid growth of charter schools has been expanding a sector that is even more segregated than the public schools” (Frankenburg, Siegel-Hawley, & Wang, 2010, p. 1). Data compiled by Frankenburg et al. (2010)

indicate that the resegregation phenomenon is highest among states in the southern U.S., and in urban minority neighborhoods. In another review of national charter school enrollment data, Henig (2008) found student demographics to be especially relevant for states like Texas, where the trend for both Blacks and Whites appears to be toward “self-segregation” (p. 101).

In North Carolina, Ladd, Clotfelter, and Holbein (2015) recently described in great detail the state’s current charter school student enrollment. Ladd et al. (2015) found that North Carolina’s charters were more likely than not, in the early years of the charter school movement, to be created to serve student populations similar to those highlighted in USCS’s charter application. In these early years, Ladd et al. (2015) suggested, charter schools typically enrolled higher percentages of minority and poor students in comparison to traditional public schools in the state. However, as the number of North Carolina charter schools continued to increase in keeping with the removal of the statewide cap in 2011, Ladd et al. (2015) asserted that North Carolina’s charters also became increasingly segregated. After 2011, for example, charter school students were more likely to have been raised by college-educated parents in wealthier homes than their traditional public school counterparts. The work of Ladd et al. (2015) led the North Carolina Public School Forum (2016) to include achieving equity in charter school enrollment in two of its *Top Ten Education Issues 2016* report.

Barriers to Achieving Balanced Enrollment in North Carolina Charter Schools

The irony for charter schools that are trying to achieve enrollments in accord with their charters is that rules and regulations intended to make admission processes fair and equitable, in practice, exacerbate inequality. In its 2015 *Annual Charter Schools Report*, the North Carolina Department of Public Instruction acknowledged several of the challenges charter schools like USCS face when attempting to address the student enrollment equity issue. The report states:

While a school can market to diverse populations to achieve a more balanced demographic make-up, the lottery, parent interest, and other *factors beyond a school's control* heavily influence the demographics of the school. Schools are challenged by statute to make an effort to reflect the demographics of the LEA. (p. 21, italics added)

Notably, the first barrier mentioned in the report is the lottery system for charter school enrollment. According to North Carolina General Statute 115C-218.45(h), North Carolina State Board of Education Policy TCS-U-003, and approved procedures outlined by the Office of Charter Schools (Medley, 2014), students must be admitted to charter schools through a tightly governed, public, blind lottery process that ensures an equal chance of admission for each student. At the same time, the state allows enrollment priority (i.e., pre-lottery admission) to several groups, including “siblings of currently enrolled students” and “siblings of students who have completed the highest grade level offered by that school” (N.C.G.S. 115C-218.45(f)). This legacy clause further exacerbates the problem of enrollment equity, as school student demographics can be largely influenced by previous and current enrollment.

In 2015, North Carolina legislators made changes to charter school legislation allowing new charter applicants to implement “a weighted lottery that reflects the mission of the school if the school desires to use a weighted lottery” (North Carolina Session Law 2015-248). Only one North Carolina charter school that existed prior to the addition of the weighted lottery provision has successfully obtained a material revision to its charter allowing it to operate a weighted lottery (Khrais, 2016). While that charter school reports that it has been able to enroll more students from its target population, after three years of weighted lotteries, the student body remains significantly less diverse economically and racially than its surrounding community, and far below enrollment goals set by its governing board. Crucially, this outcome shows that while implementing a weighted lottery may result in some movement toward meeting enrollment

targets, weighted lotteries may be only minimally effective if there remains insufficient diversity in the applicant pool in the first place.

Factors “Beyond a School’s Control”

As mentioned previously, the 2015 North Carolina *Annual Charter Schools Report* states that local contextual factors “beyond a school’s control” also contribute to equity gaps with respect to charter school student enrollment. USCS is, in many ways, a microcosm of these contextual factors as they relate to rural charter schools for a variety of reasons.

Social Factors

Rural communities are often defined by unique histories, cultures, geographies, and populations (Schafft & Jackson, 2010). The region served by the HBCU with which USCS partners exemplifies each of these unique criteria. From its various waterways and swamplands to its close proximity to early and current oceanic trade routes, regional geography has played a major role in shaping the local culture (Sawyer, 2010). This rural area is roughly equidistant from three large metropolitan regions, each more than an hour away by car. The population in the region is among the lowest in North Carolina, averaging fewer than 20,000 residents per county (U.S. Census, 2010). It is also quite distinct in that Blacks and Whites are overrepresented, and other racial/ethnic groups are underrepresented, in comparison to statewide averages. Each of the counties in this region boasts a single school district and operates, generally, only one major high school. These high schools have been in operation for generations, and they are truly community schools. Like most rural high schools, each of the high schools in this region serves as a powerful institution for perpetuating norms and values, and brokering social capital in these communities (Schafft & Jackson, 2010).

Employment

Due to the struggling rural economies of the region in which USCS operates, the local school districts also tend to be among the largest employers in the area. Many families are linked by family or social ties to one or several school district employees. Student flow to the charter school and away from the local public schools is anecdotally perceived by some of these community members as threatening not only their traditional public schools, but also their livelihoods and communities. This anti-charter community sentiment has reportedly been a major factor militating against some families' submissions of applications for their children to attend USCS, regardless of whether the family has a member employed by a local school district. Since some such families—whose children reputedly would be ideal candidates for admission to USCS—have chosen not to submit applications for their children to attend the charter school, a weighted lottery would be an ineffective means of influencing the student enrollment demographics.

School Choice

While USCS is the first charter to operate in this region, it is not the only available option for some families. Several private parochial schools, and a private, religious non-denominational school are also options. When local schools integrated in the 1960s, anti-integrationists founded the private schools mentioned above to thwart attempts at integration in much the same way as groups did in other areas in response to the *Brown v. Board of Education* ruling (Myers, 2004). Anecdotally, the idea that charters are simply the latest iteration of this same type of anti-integration movement is prevalent among many community members. This sentiment has been echoed by some charter school critics, and supported by studies of schools conducted in other areas (Ladd et al., 2015; Urrieta, 2005; Urrieta, 2006). Themes of prejudice, racism, and staves

of reconciliation are commonplace in the USCS region, and have become the foundation for community sentiment for or against the charter school, regardless of the instructional programming offered by the school. Anecdotally, opting to send a child to USCS is perceived by some as subscribing to an anti-integration, racist ideal. This may well be a factor hampering the school's efforts at recruiting racial/ethnic minorities.

The bottom line of the summation of “factors beyond a school's control” is that, in the absence of an applicant pool containing a quorum of minority students, it will be very difficult for USCS to enroll a student body that is consistent with its target population.

Marketing Mix Strategy as a Tool for Balanced Enrollment

A promising approach to achieving an appropriate mix in USCS's applicant pool—and the applicant pools of other charters on the state and national levels—is the development and implementation of an effective marketing and recruitment plan designed to ensure a sufficient number of students from target populations in that applicant pool (Eckes & Trotter, 2007). As other researchers have noted, studies evaluating the effectiveness of specific charter school marketing and recruitment strategies are virtually absent from the literature, and few other resources exist to guide marketing and recruitment plan development (Eckes & Trotter, 2007; Lubienski, 2005; Lubienski, 2007; Lubienski, Linick, & York, 2012; Oplatka & Helmsley-Brown, 2004). However, one promising framework for developing a sound educational marketing strategy was proposed early in the choice movement by Kotler and Fox (1995).

Traditional marketing strategies focused on the 4 Ps outlined by McCarthy (1964): product, place, price, and promotion. Kotler and Fox (1995) contextualized the 4 Ps for educational marketing and expanded them to include an additional three—people, process, and physical facilities. For educational institutions,

- programs include the curriculum, services, and experiences provided by the school;
- place refers to the location where the product and/or service is being provided;
- price is the cost to the consumer (i.e., students, their families, and/or the community) for the product and/or service;
- promotion is how the school advertises the product and/or service;
- people are those that deliver the product or service;
- process is how educational products and/or services are delivered; and,
- physical facilities encompass the bricks and mortar structures within which the educational services are provided.

Taken together this 7 Ps framework may be a useful tool in the development of a marketing mix strategy for charter schools.

In the context of educational institutions, “an understanding of how and why pupils/parents choose as they do” is central to the development of an overall marketing mix strategy (Foskett, 1998). This knowledge of the educational consumer is vitally important since it informs the development of the overall marketing strategy, as well as the design of specific messaging that resonates with the target demographic (Foskett, 1998; Kotler & Fox, 1995; Kotler & Lee, 2007). For service organizations generally, Kotler and Lee (2007) state that the fourth P, promotion, “is used to inform, educate, and persuade target markets” (p. 15). To promote the product or service effectively, the organization must understand its target population—including (a) the types of information they receive, (b) how they receive it, and (c) how they interact with it (Foskett, 1998). These three questions remain unanswered with respect to the target population of USCS, and the answers are both implicit in the central questions guiding this study and

essential to the development of an effective marketing strategy aimed at enabling USCS to fulfill its charter.

Purpose of Study

I developed the problem of practice theory of change model shown in Figure 1 to illustrate the logical framework that underpins my study. The student population of USCS was out-of-balance with respect to both the racial/ethnic composition of the population of TSD, and the USCS target population identified in its charter. To address this problem of practice, I adopted a case study methodology consistent with the case study design and practices outlined by Yin (2014).

The purpose of my case study was to explore how and why parents chose USCS in order to inform the development of a new marketing mix strategy aimed at achieving a student population that more closely reflected the racial/ethnic composition of TSD. Three central questions guided my work:

1. How do parents choose USCS?
2. Do the choice processes differ between parents of target (parents of the “under represented” minority demographic) and non-target populations?
3. How has the current marketing mix strategy implemented by USCS shaped its student population?

The answers to these questions led to the development of a marketing mix strategy built on the 7 Ps (Kotler & Fox, 1995), with a long-term goal of achieving a school population that is more representative of the general population of the region served by USCS, as well as the target population set forth within the school’s charter.

The Problem of Practice Theory of Change Model

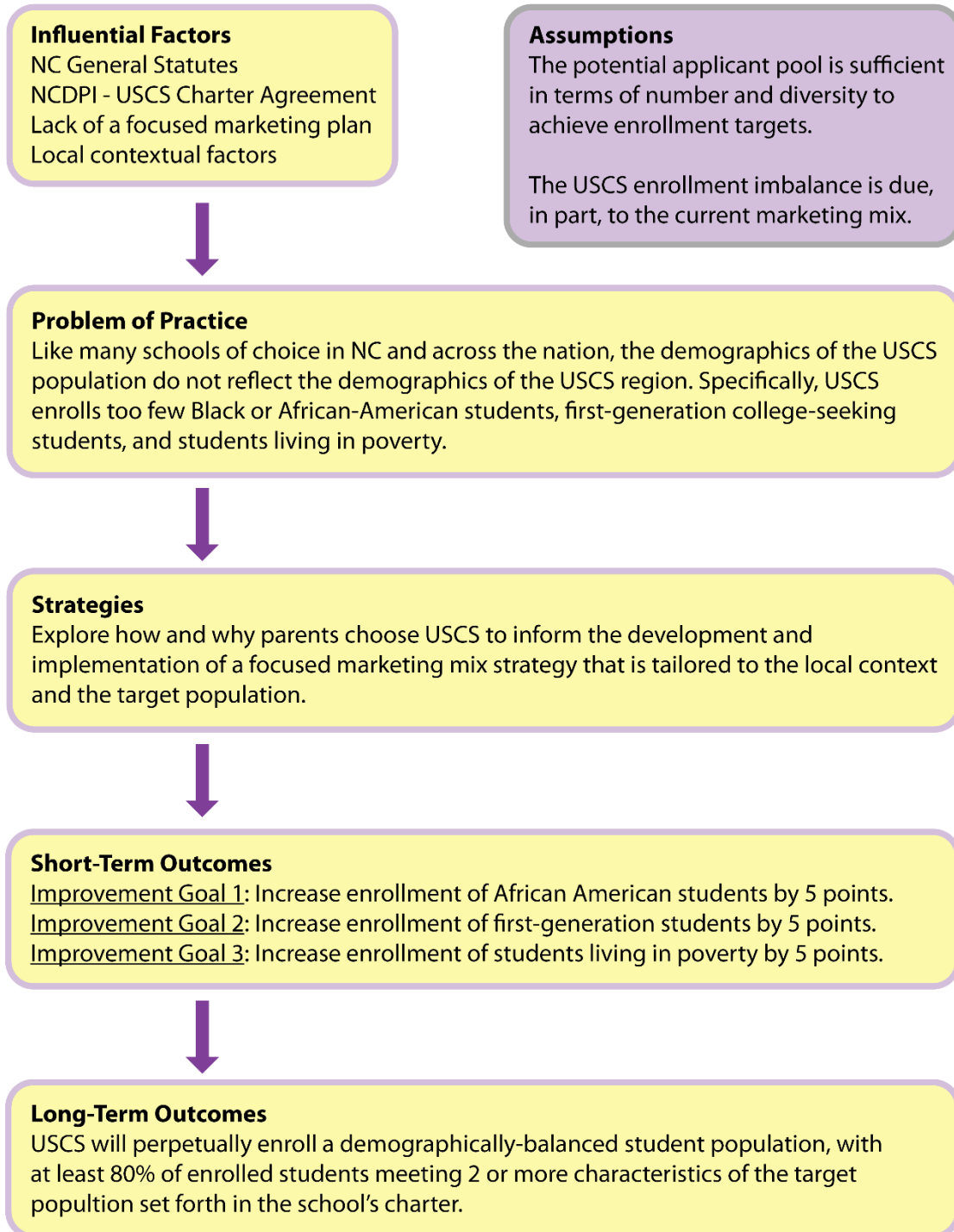


Figure 1. Problem of practice logic model.

CHAPTER 2: IMPROVEMENT GOAL

Ultimately, the effectiveness of this new and focused marketing mix strategy as an approach to achieving racial/ethnic balance at USCS will be determined by the extent to which the demography of USCS's Cohort 3 moves toward, or away from, the TSD population demographic. Specifically, the goals of the new marketing mix strategy informed by this case study were to achieve:

1. A 5 percentage point increase in the enrollment of students who identified as Black or African American,
2. A 5 percentage point increase in the enrollment of students who qualified for free and reduced lunch prices according to National School Lunch guidelines, and
3. A 5 percentage point increase in the enrollment of students who were first-generation college-seeking.

Numeric targets for each of these improvement goals are shown in Table 2.

I anticipate that these improvement goals will be attainable because of the magnitude of change in population demographic from Cohort 1 to Cohort 2, and the size and diversity of the potential applicant pool. As shown in Table 1, the percentage of White students as a proportion of the full cohort of students rose 14 percentage points from Cohort 1 to Cohort 2, while the proportion of Black or African-American students decreased by 13 points. Similar demographic shifts occurred along lines of poverty and educational attainment (see Table 3).

From Cohort 1 to Cohort 2, the percentage of students who would be the first in their immediate family to earn a college degree decreased by 17 percentage points, from 51% to 34%. Free and reduced lunch qualifiers also decreased sharply, from 44% of Cohort 1 students to only 23% of Cohort 2 students, or 21 percentage points overall. When all three of these characteristics

Table 2

USCS Enrollment Targets

Population	B	FG	FRL
Cohort 2	11%	34%	23%
Cohort 3 Target	16%	39%	28%

Note. B=Black or African-American, FG=First generation college student, FRL=Free or reduced lunch. All values rounded to the nearest whole number.

Table 3

Educational Attainment and Free and Reduced Lunch Qualifiers, Cohorts 1 and 2

Population	FG	FRL
Cohort 1	51%	44%
Cohort 2	34%	23%

Note. FG=First generation students. FRL=Free and reduced lunch qualifiers. All values rounded to the nearest whole number.

are taken into account, it is overwhelmingly clear that the USCS student population demographics shifted dramatically away from those of its target population after the first admission cycle. However, these year-over-year changes suggest that target population gains of 5 percentage points from Cohort 2 to Cohort 3 are well within reason, provided that an applicant pool which is sufficient in both number and diversity exists. The potential applicant pool present within the recruiting area of USCS satisfies these two requirements. Race/ethnicity and poverty data for children below age 18 years is shown in Table 4.

According to American Community Survey data, an estimated 26,020 residents living within the USCS recruiting zone were under age 18 in 2016. Overall, Black or African-American children represented 26% of the total population of children, and more than one in four children in the area were living in poverty. Data shown in Table 5 indicate that 19,763 of these approximately 26,020 children were attending private, public, and homeschools from kindergarten through Grade 12 during the 2015-16 school year.

The U.S. Census American Community Survey provides educational attainment data for the total population according to two age categories—18 to 24 years and 25 years and over—and seven levels of attainment: less than 9th grade; 9th to 12th grade, no diploma; high school graduate, includes equivalency; some college, no degree; associate's degree; bachelor's degree; and, graduate or professional degree. Parents of the USCS applicant pool are most likely to be represented within the population age 25 and above. Of this subgroup, those with educational attainment levels of *some college, no degree* and below meet the USCS definition of having not earned a college degree (i.e., parents of the USCS target population). Educational attainment data for the population age 25 and older who have not earned a college degree are summarized in Table 6.

Table 4

Comparative Demographics, USCS Recruiting Area Estimates

County	W	B	O	M	H	POV
A	2025 78%	325 13%	120 5%	30 1%	100 4%	360 14%
B	1580 49%	1275 39%	55 2%	90 3%	245 8%	1360 42%
C	4810 84%	335 6%	10 >1%	240 4%	305 5%	800 14%
D	1595 60%	790 30%	35 1%	130 5%	115 4%	690 26%
E	4380 49%	3360 37%	190 2%	400 4%	680 8%	2610 29%
F	1750 63%	750 27%	0 0%	160 6%	140 5%	950 34%
Region	16140 62%	6835 26%	410 2%	1050 4%	1585 6%	6770 26%

Note. W=White, B=Black or African-American, O=Other, M=Two or more races, H=Hispanic and Latino, ND=No degree, POV=Income at or below poverty level. Data from National Center for Education Statistics, American Community Survey Profile Tables, 2011-2015. All values rounded to the nearest whole number.

Table 5

Enrollment by School Type, USCS Recruiting Area

County	Public	Private	Homeschool	Total
A	1800 88%	118 6%	121 6%	2039
B	2049 89%	108 5%	147 6%	2304
C	3966 86%	306 7%	360 8%	4632
D	1612 79%	218 11%	204 10%	2034
E	5739 83%	523 8%	634 9%	6896
F	1684 91%	22 1%	152 8%	1858
Region	16850 85%	1295 7%	1618 8%	19763

Note. Public school enrollment totals from Average Daily Membership (ADM) report, 2015-16, North Carolina Department of Public Instruction. Private school totals from 2016 American Community Survey, U. S. Census. Homeschool totals from 2016 North Carolina Homeschool Statistical Summary, State of North Carolina Department of Non-Public Education.

Table 6

Educational Attainment, Age 25 Years and Over, USCS Recruiting Area

County	N	Percent
A	4,314	63%
B	7,428	71%
C	11,955	69%
D	6,268	77%
E	19,145	72%
F	7,367	74%
Region	56,477	71%

Note. N=Number of residents age 25 and older with no degree, as determined by population with *some college, no degree* or lower attainment, U. S. Census American Community Survey, 2016. All values rounded to the nearest whole number.

Considering the racial/ethnic diversity of children in the USCS region (Table 4), the number of school age children (see Table 5), and the low education attainment among the population age 25 years and over (see Table 6), there are clearly sufficient numbers of potential applicants to reach all three improvement goals. If the size of Cohort 3 mirrors the size of Cohort 2 (156 students), new student enrollment will represent less than 1% (actually, 0.8%) of the overall population of school-age children within the USCS region. In order to achieve these improvement goals, I adopted a qualitative approach which I will outline in greater detail in subsequent chapters.

CHAPTER 3: QUESTIONS AND TASKS

Yin's (2014) seminal text describing the case study methodology has been cited in the literature more than 100,000 times, according to Google Scholar. Yin (2014) noted that, while there is not yet a standard case study design available to guide researchers' efforts, several key practices have been implemented effectively and consistently by many. Firstly, case study questions are "posed to...the researcher, not to an interviewee" (Yin, 2014, p. 89). Once these guiding questions are developed, case study researchers then carefully and purposefully identify sources of evidence that are best suited to answer each question. According to Yin (2014), there are six major sources of evidence obtained through case study methodology: documentation, archival records, interviews, direct observations, participant-observation, and physical artifacts. The case study questions (Yin refers to these as Level 2 questions) and types of evidence available to the researcher inform the specific methods of data collection and analysis that will be performed throughout the course of the case study. Consistent with this approach, I will discuss the research questions, case study questions, types of evidence, methods of data collection, and methods of analysis within the remainder of this section.

The research literature suggests parents make K-12 school choice decisions following varying rationales, and little research has been done to elucidate a decision-making process that characterizes how parents choose from among available school options (Hamilton & Guin, 2005). One early, three-stage college-choice process model (Hossler & Gallagher, 1987) was applied to a K-12 setting by Bell (2009) in her study of how parents form K-12 choice sets. Bell's adaptation of the Hossler and Gallagher (1987) college choice model includes:

- Predetermination: Parents decide if they need to conduct a school search.

- Search: Parents seek information about available school options and form a choice set.
- Choice: Parents evaluate schools from their choice set and select a school for their child.

This three-stage school choice model is similar to the five-stage traditional consumer decision process model, such as the model described by Erasmus, Boshoff, and Rousseau (2001).

To identify key Level 2 (case study) questions that would shed light on the first Level 1 research question, I developed the hybrid school choice decision process model shown in Table 7. This hybrid model adds a fourth stage to Bell's (2009) model—outcome evaluation—to capture school choice behaviors that may occur during the period of time between the submission of a student's enrollment forms to USCS and the student's actual class attendance at USCS.

To discover how the school choice decision process played out in relation to the hybrid school choice model (HSCM) focusing on the case of USCS, I began this study by conducting semi-structured, individual interviews of parents of currently enrolled USCS students, while consciously keeping in the forefront of my mind the Level 2 questions in Table 8. Again, following Yin (2014), Level 2 questions are questions for the researcher, not the participant. The semi-structured individual interview protocol, which contains sample question types, is included as Appendix E.

I solicited parents for individual interviews according to the following protocol. Firstly, I generated copies of enrollment forms for all students currently attending USCS. These enrollment forms required parents to provide information regarding their own educational attainment, the student's race, ethnicity, gender, and their eligibility for free or reduced price

Table 7

Comparison of Consumer and School Choice Decision Process Models

Traditional Consumer Model	Bell School Choice Model	Hybrid School Choice Model
Problem recognition/pre-search	Predetermination	Predisposition/problem recognition
Information search	Search	Search
Alternative evaluation	Search/choice	Search/choice
Choice	Choice	Choice
Outcome evaluation	--	Outcome evaluation

Note. Traditional Consumer Model from Erasmus et al. (2001). Bell School Choice Model from Bell (2009). The search stage of the Bell and Hybrid models includes elements of the information search and alternative evaluation phases of the Traditional Consumer Model. The choice phase of the Bell and Hybrid models includes elements of the alternative evaluation and choice phases of the Traditional Consumer Model. The Bell model does not consider post-choice behaviors described in the outcome evaluation phase of the Traditional Consumer and Hybrid models.

Table 8

Choice Process Phases and Level 2 Case Study Questions

Choice Process Phase	Level 2 Questions
Predisposition/problem recognition	What leads parents to seek a different schooling option?
Search	<p>How do parents obtain information about available school options?</p> <p>What information about available school options do parents obtain?</p> <p>How do parents interpret the information they obtain about each school in their choice set?</p>
Choice	<p>What push-pull factors do parents consider when making school choice decisions?</p> <p>What factors influence parents to choose USCS?</p>
Outcome evaluation	<p>What push-pull factors do parents encounter after they have enrolled their students in USCS?</p>

meals. Based on these enrollment form data, I created a list of parents whose enrolled students were characterized by two or more traits of the USCS target population (target parents), and a list of parents whose enrolled students were not characterized by two or more of the traits of the USCS target population (non-target parents). Initially, I invited for individual interviews a convenience sample consisting of five target parents and five non-target parents, utilizing theoretical sampling to seek the participation of further interviewees as necessary to attain saturation (Corbin & Strauss, 2015).

I conducted all interviews at USCS—which was an easily accessed central location for parents. During each interview, I maintained field notes to record my reflections, key words, observed body language, and other relevant information. I documented my immediate perceptions and observations of each interview in the form of memos immediately following each interview (Corbin & Strauss, 2015; Yin, 2014). All interviews were recorded using an audio recorder, transcribed, and analyzed using the open coding and chronological protocols described by Corbin and Strauss (2015). I utilized *NVivo* qualitative analysis software to serve as the case study database and as a tool for qualitative analysis.

Both Corbin and Strauss (2015) and Creswell (2014) highlight the researcher's inability to pre-determine the number of interviews that will enable the full development of categories and themes prior to the onset of a study. Accordingly, as mentioned above, I interviewed additional parents until I reached the point of saturation. Corbin and Strauss (2015) define saturation as “the point in the research when all major categories are fully developed, show variation, and are integrated” (p. 135). Creswell (2014) suggests as many as 20 interviews may be necessary to arrive at the point of saturation. I did not pre-determine the number of interviews to conduct, but, as discussed above, the study was guided by the principles of theoretical sampling and saturation.

In addition to individual interviews, I analyzed other sources of evidence, such as documentation, archival records, and physical artifacts. These additional sources of evidence were used to strengthen the construct validity, internal validity, and external validity of the case study—three of the four design tests outlined by Yin (2014) as criteria of quality case study research designs.

All interview transcriptions were coded to indicate the following demographic characteristics of the interview participant's enrolled student, as reported on school enrollment forms, using the following notation:

- Race/Ethnicity: W (white), Af-Am (African-American), O (other)
- Educational Attainment: D (degree earned), ND (no degree earned)
- Poverty Status: FRL+ (student receives free or reduced price lunches); FRL- (student does not receive free or reduced price lunches)

I used comparative analysis of the categories that emerged, and their properties and dimensions, in order to determine if the school choice decision making process differed between target and non-target parents.

After I completed all individual interviews, I collaborated with school personnel to facilitate the development and implementation of a new marketing mix strategy informed by the case study analysis. The USCS marketing team, composed solely of school personnel, utilized the 7 Ps framework of Kotler and Fox (1995) to develop the marketing mix strategy. This work occurred over multiple planning sessions during the second and third months of the study.

Consistent with established marketing research practices (Calder, 2010; Creswell, 2013; Kotler & Fox, 1995; Kreuger & Casey, 2015; Krishnamurthi, 2010), I conducted semi-structured focus group interviews to explore how the previous marketing mix strategy may have shaped

school enrollment demographics and to validate the new marketing mix strategy that was informed by my preliminary findings. When determining the composition and size of focus groups, Kreuger and Casey (2015) suggest making a concerted effort to interview groups that are homogeneous with respect to the purpose of the study. Further, they suggest, focus group sizes of five to eight people tend to yield optimal results, and as many as three focus group interviews may be required to reach saturation (Creswell, 2013; Kreuger & Casey, 2015). For this study, I conducted two focus groups composed of six to 10 parents each.

Focus group participants were asked to respond to semi-structured interview questions (see Appendix F) about various aspects of the school's past marketing mix strategy, including the school website, printed materials. I used some of these interview questions to initiate conversation and to stimulate discussion. Focus groups were also asked to provide feedback related to the new marketing mix strategy developed by school personnel. During each focus group interview, I maintained field notes to record my reflections, key words, observed body language, and other relevant information.

In keeping with Yin's (2014) approach to case study research, I also compiled and analyzed archival documents, physical artifacts, and other sources of evidence to triangulate and strengthen the findings from these focus group interviews. Focus group interviews were video recorded. All video files were stored in the case study database, coded, and analyzed using *NVivo* software to facilitate the development of grounded theory with respect to the past and current marketing mix strategy.

I completed the aforementioned tasks according to the timeline shown in Figure 2. Once I received IRB approval (see Appendix A), I promptly notified the USCS Board of Directors of my intent to begin field work (see Appendix B). I sent a letter to target and non-target parents

introducing them to the study and inviting them to participate in an individual or focus group interview (see Appendix C). Prior to beginning each interview, I asked each interview participant to document his or her acknowledgement and consent using the form shown in Appendix D. The semi-structured individual and focus group interview protocols I followed can be found in Appendix E and Appendix F.

As mentioned in the previous section, at the end of each interview, I recorded memos to capture my initial perceptions and reflections of the interview. I transcribed, coded, and maintained the individual interview and focus groups interview data in the case study database within *NVivo*. Other sources of evidence, such as documentation, archival records, and physical artifacts, were also collected, incorporated into the *NVivo* case study database as external artifacts, and coded appropriately. These essential tasks—building the case study database and analyzing case study data—occurred over the span of two full months.

Informed by my analysis, USCS personnel developed and implemented a new marketing plan during the six-month recruiting period of Cohort 3. To measure the results of the new marketing plan in relation to the three improvement goals, I collected final student enrollment data during the ninth month of my study. When my study was complete, I communicated the results of the marketing plan implementation to the USCS Board of Directors.

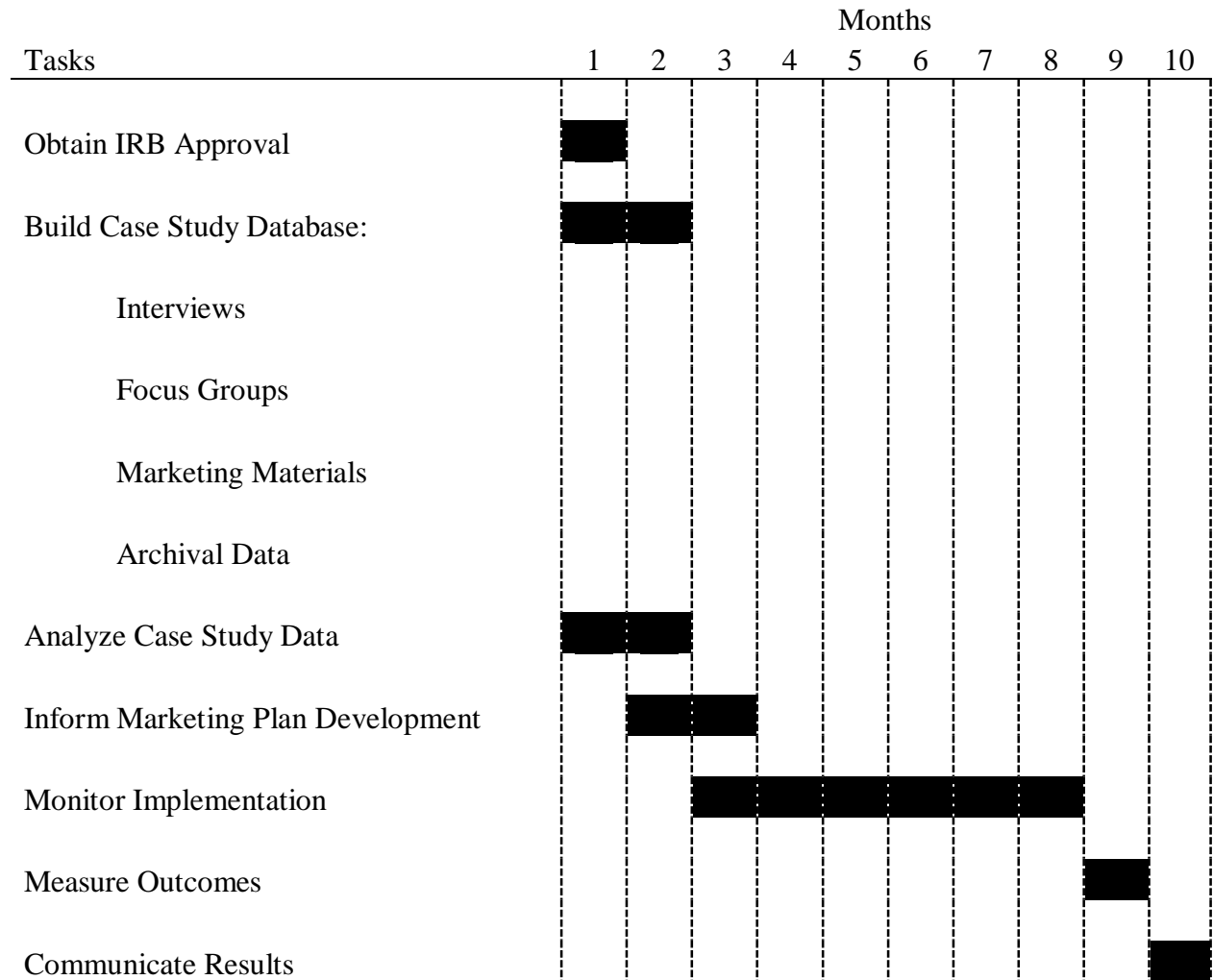


Figure 2. Study plan.

CHAPTER 4: DATA COLLECTION AND ANALYSIS

In order to facilitate my research into how parents choose to send their children to USCS, the variety of choice processes among segments of the families, and how the current marketing strategy has shaped the current makeup of the school population, USCS provided me with access to a database containing demographic and enrollment data for all students, and these data were what I used to identify the parents/caregivers of target and non-target students. As a reminder, the definition of target students was determined by the founders of USCS as including (a) girls of all racial/ethnic groups, (b) Black, Hispanic, and American Indian students, (c) students from low socioeconomic status families, and (d) students whose parents have not earned a college degree.

Participant Selection and Participation

In order to maintain consistency across participants and enable me to subdivide them into appropriate groups, it was essential that I established the following operational definitions. Clearly, concepts of “target” and “non-target” are pivotal to my project. There is a conceptual equivalence involved in moving from the definition of target students adopted by the founders of USCS—which were understandably focused on students—to a definition that is pertinent to families. I implemented the following heuristics for delineating between target and non-target families by focusing on four demographic characteristics: race/ethnicity of the student, sex of the student, educational attainment of the parent, and family income as follows:

- In terms of race/ethnicity, the race/ethnicity of the student was used as the ethnicity of the family.
- In terms of the sex of the student, for families with multiple students enrolled at the school, the sex of the majority of those students was used for classification purposes.

- In the event that two students of opposite sexes from a single family were enrolled at the school, the sex was for family purposes was classified as *female*.
- In terms of educational attainment, if either parent of a student had earned a two- or four-year degree, the educational attainment status was classified as *degree*. If neither parent had earned a two- or four-year degree, the educational attainment status for the family was classified as *no degree*.
- In terms of family income, poverty status was determined by whether or not the student's family qualified for free or reduced price lunches under the requirements of the National School Lunch Program.
- Finally, families with two or more target characteristics were classified as *target*; all others were classified as non-target.

I acknowledge that these operational distinctions constitute heuristics that are open to question, but I maintain that they are defensible in that they are oriented to providing a holistic overview of the population of USCS and, most importantly, they can be consistently applied.

Categories of Data

The data I collected can be broadly classified as consisting of interview data, focus group data, and data distilled from marketing materials.

Interview Data Collection

The parents of five target and five non-target families were initially invited to interview. Additional parents of target and non-target families were invited to interview until data collection reached the point of saturation. In all, 11 parents of non-target families and 15 parents of target families (only one parent in each instance) were contacted by phone and email and invited to participate in individual interviews. Of these 26 who were invited to participate, eight

parents of non-target families and 11 parents of target families, for a total of 19 in all, accepted my request for an interview. Demographic data for these 19 interview participants are shown in Table 9.

Focus Group Data Collection

Three sets of eight additional parents each were invited to participate in one of three focus groups. One of these focus groups was intended to consist exclusively of parents of target families, and the other two were intended to consist of a mix of parents from both target and non-target families.

Of the eight parents of target families who were invited to participate in the homogeneous target family focus group (a focus group composed solely of parents of target families), only one parent agreed to participate and arrived as scheduled for the focus group interview. Considering the absence of additional participants, I conducted an individual interview of the parent following the same process and using the same guiding questions as I did for other individual interviews. I attempted to reschedule the homogeneous target family focus group, but my attempts were unsuccessful. The invited parents cited work and family obligations as preventing them from being able to participate.

Four target parents and four non-target parents were invited to participate in a mixed focus group, and all eight of these parents and two spouses participated in the focus group. In the final mixed focus group, four target parents and four non-target parents were invited to participate, and five of those who were invited participated. In total, 15 parents participated in focus group interview sessions, and demographic data for these focus group participants are shown in Table 10.

Table 9

Demographic Characteristics of Students of Interview Participants

Participant	Race/ Ethnicity	Sex	Educational Attainment	Income	Number of Target Characteristics	Target or Non- Target
1	White	Male	No Degree	Non-FRL	1	NT
2	Minority	Male	No Degree	FRL	3	T
3	White	Male	Degree	Non-FRL	0	NT
4	White	Female	Degree	Non-FRL	1	NT
5	Minority	Female	No Degree	FRL	4	T
6	Minority	Female	No Degree	FRL	4	T
7	White	Male	Degree	Non-FRL	0	NT
8	Minority	Male	No Degree	Non-FRL	2	T
9	Minority	Male	No Degree	Non-FRL	2	T
10	White	Female	No Degree	Non-FRL	1	NT
11	Minority	Female	Degree	FRL	3	T
12	White	Female	Degree	Non-FRL	1	NT
13	White	Female	Degree	Non-FRL	1	NT
14	Minority	Female	No Degree	FRL	4	T
15	Minority	Male	No Degree	Non-FRL	2	T
16	White	Female	Degree	Non-FRL	1	NT

Table 9 (continued)

Participant	Race/ Ethnicity	Sex	Educational Attainment	Income	Number of Target Characteristics	Target or Non- Target
17	Minority	Female	No Degree	Non-FRL	3	T
18	White	Female	No Degree	Non-FRL	2	T
19	White	Male	No Degree	FRL	2	T

Note. Race/ethnicity and sex fields indicate characteristics of the student. Educational attainment and income fields indicate characteristics of the parent(s). FRL = Qualifies for free or reduced lunch, Non-FRL = Does not qualify for free or reduced lunch, T = Target, NT = Non-target.

Table 10

Demographic Characteristics of Students of Focus Group Participants

Participant	Race/Ethnicity	Sex	Educational Attainment	Income	Number of Target Characteristics	Target or Non-Target
1	White	Male	Degree	Non-FRL	0	NT
2	Minority	Male	Degree	Non-FRL	1	NT
3	White	Female	Degree	Non-FRL	1	NT
4	White	Female	Degree	Non-FRL	1	NT
5	White	Male	Degree	Non-FRL	0	NT
6	Minority	Female	Degree	Non-FRL	2	T
7	Minority	Female	Degree	Non-FRL	2	T
8	White	Male	Degree	Non-FRL	0	NT
9	Minority	Female	Degree	Non-FRL	2	T
10	Minority	Male	Degree	Non-FRL	1	NT
11	Minority	Female	No Degree	FRL	4	T
12	Minority	Female	No Degree	FRL	4	T
13	White	Female	No Degree	FRL	3	T
14	White	Male	Degree	Non-FRL	0	NT
15	Minority	Male	No Degree	Non-FRL	2	T

Note. Race/ethnicity and sex fields indicate characteristics of the student. Educational attainment and income fields indicate characteristics of the parent(s). FRL = Qualifies for free or reduced price lunch, Non-FRL = Does not qualify for free or reduced lunch, T = Target, NT = Non-target.

Marketing Materials Collection

I also requested and received from the school previously developed marketing materials, emails pertaining to admissions and enrollment over a two-year period, and some local news clippings about the school.

Data Processing and Saturation

All data were analyzed and presented to the USCS recruiting and marketing team, who used my analysis to develop a new marketing mix strategy for the school.

Interview Data Processing

All individual interviews were audio recorded, transcribed, and both the audio recordings and transcriptions were placed in *NVivo Pro* (Version 11 for Windows) software for analysis. To confirm the accuracy of the interview transcripts, I emailed a verbatim interview transcript to each individual interviewee. All interviewees had active email accounts. Within one week of the email with the transcript attached, I called each interviewee by phone to solicit feedback on the content of his or her transcript. When needed, I called interviewees to gain greater clarity about specific aspects of their interviews. Each interviewee confirmed receipt of the transcript, and I received no requests for corrections.

Focus groups were video recorded, and the videos were also placed in *NVivo* software for analysis. I did not attempt to transcribe the focus group interactions.

Each response to each individual and focus group question was initially sorted deductively by the extent to which the response answered each of the Level 2 case study questions listed in Table 8. Once this initial sort was completed, I inductively developed an initial list of potential themes, properties, and dimensions based on the content of each response. This initial list was continuously refined until the first round of analysis was completed for all

data sources. The resulting list of codes was then further refined based on summative themes, and all data were analyzed and coded according to the master code list in Appendix G.

Marketing Materials Data Processing

The school provided access to 118 emails received from potential applicants during the previous two admission cycles. Among this email set were emails sent by both students and parents. No demographic data were available for these information sources. Each email was placed into my case study database within *NVivo* and coded using the master code list. These documents were used to validate some of the emerging themes, properties, and dimensions. No new themes, properties, or dimensions emerged from email data, so no additional emails were requested.

The school also provided access to a folder containing several local newspaper articles that were published about the school during the year preceding the first day that the school opened. Each of these articles was placed into my case study database within *NVivo* and coded using the master code list. These articles were used also to validate some of the emerging themes, properties, and dimensions. No new themes, properties, or dimensions emerged from these articles.

USCS staff compiled a portfolio consisting of all previous marketing materials, including physical artifacts and digital materials. Physical artifacts ranged from brochures, rack cards, and mailings to students' projects and printed folders containing information about the school and its partner organizations. Digital materials included two marketing videos that were widely used during the recruiting window of Cohort 1, photos that had been published through social media outlets to market the school, the school's previous marketing and recruitment plans, blank

student application forms and lottery procedures, the school’s original charter application, and all letters that had been sent to prospective applicants since the school’s opening.

Data Saturation

As mentioned previously, Corbin and Strauss (2015) define saturation as “the point in the research when all major categories are fully developed, show variation, and are integrated” (p. 135). All major categories were well developed, varied, and integrated after the individual interviews concluded. To confirm saturation, I drafted additional questions aligned to the emerging themes and included them in the focus group interviews. At the end of the focus group interviews, no new information surfaced. Analysis of news articles and emails further validated saturation, with no new categories emerging from these evidence sources.

Research Question 1: How Parents Choose USCS

Having detailed the data I collected and provided an overview of how I tackled the analysis of these data, in this section I will set out my findings from my analysis under the headings of each of my research questions.

As mentioned earlier, I used the hybrid school choice model (HSCM) as a framework to guide my exploration of how parents chose USCS. Briefly, the HSCM consists of four phases: predisposition/problem recognition, search, choice, and outcome evaluation. The data gathered during this study indicated that the decision-making process employed by parents consistently aligned to the HSCM, but variability existed within each of the phases. Categories, properties, dimensions, and descriptions aligned to each of the four HSCM phases are included in Appendix G. Due to the richness of the descriptions for each code, I have not included the master code list—in full or in part—in this section; however, the content contained within warrants attention.

Phase I: Predisposition/Problem Recognition Phase

With respect to the predisposition/problem recognition phase, USCS parents tended to fall into one or more of the categories that are summarized in Table 11.

Pre-disposers. There was no clear association between the family's status as USCS target or non-target and a parent's predisposition to conduct a school search. The term predisposition refers to the tendency of a person to act in a certain way. In my study, I found that some parents evinced a tendency to conduct a school search oriented in a particular way. In this instance, a parent's predisposition to conduct a school search was more closely associated with the student's previous enrollment pattern. This is the first of many key findings from my study. Bell (2009) mentions that, for some families, the decision of whether or not to go to college is essentially a non-decision; their students *are* going to college, because college attendance is an enduring expectation for every family member. In the case of USCS, this same type of family-defining, cultural characteristic was also an initiating factor for school search.

For parents who had previously conducted some type of school search (which I interpret as indicating that they are predisposed to search for schools), the stimulus for making the decision to search for another school was unrelated to a specific problem. Parents in this group were already in an almost continual state of search for available school options. In this sense, these *continual searchers* were predisposed to conduct a school search—increasing the likelihood that they would encounter and consider USCS. Several talked about visiting private schools in the area, talking with homeschoolers in the area, and researching newly available schooling options, such as virtual schools and online programs. In the words of one *continual searcher*,

Table 11

Emergent Categories of Parents, Predisposition/Problem Recognition Phase

Category	Description
Pre-disposers	Parents who tend to conduct a school search oriented in a particular way.
Continual Searchers	Parents who seek information about a wide variety of school options on a regular basis.
Alternative Pre-disposers	Parents who seek to enroll their students exclusively at schools other than traditional public schools.
TPS Pre-disposers	Parents who do not seek information about schools other than traditional public schools due to moral/ethical, community, and/or family reasons.
Non-pre-disposers	Parents who do not display a tendency toward a particular school type or for inherent engagement in school search.
Problem Perceivers	Parents who initiate a school search after recognizing problems with the current school setting, or after passively receiving information about a school option that purports to address a perceived deficiency of the current school setting.
Student Initiators	Students who motivated their parents to initiate a school search. Parents who are unlikely to conduct a school search without pressure to do so from their children.

he attended a public school for elementary school. And he was at [traditional public school], and he was there through third grade and then fourth, fifth, and sixth was homeschooled. Seventh and eighth at [private school]. We made that transition because he was at that, whatever it was, 11-year-old age and it was just two years of real big transition for him. So it was just like we needed to do something. It was time for a change again.

Distinct from the *continual searchers*, other parents were predisposed to begin a search for USCS due to their previous decisions to enroll their students exclusively at schools other than traditional public schools, such as private schools, or other charters, or to homeschool their children. These *alternative pre-disposers* were less likely to begin a school search because they recognized some type of problem. Instead, *alternative pre-disposers'* responses indicated the existence of a continuing dialogue about schools, educational opportunities, and school options within their social networks. For instance, one target parent who had previously chosen public charter schools for her student stated

I wanted her to go to a charter school, because she was in a charter school in Winston-Salem. And I noticed that when you came back down here, it was completely different--the school room was way different than what she was used to. So I had went online and wanted to look up the different programs and the...what all was pertaining to the school.

In the words of another *alternative pre-disposer*,

I'm familiar with the charter school system. All of my children was in charter schools. So, I just prefer charter school all around. I would suggest it to anyone. So when we came here, I was looking for a charter school.

A third *alternative pre-disposer* parent explained that “well, actually, we're originally from Jersey, and she's always been in charter school...uniform-based and everything like that. So that's the type of school that I wanted her in, anyway.”

Parents in a third group were predisposed not to engage in a school search. *Traditional public school (TPS) pre-disposers* were parents whose children historically attended only traditional public schools. Just as the *alternative pre-disposers* were predisposed to conduct a

search for school options other than traditional public schools, the *TPS pre-disposers* were not familiar with non-TPS school options in the area, and had never considered sending their children to non-TPS schools due to cost, moral-ethical reasons, or because the local traditional schools were simply *what you do here*. As one parent stated in an individual interview, “Yeah. It's what we do. And I don't want to take her away from that social scene. And I mean, and we grew up like that.” In this rural context, *TPS pre-disposers* spoke with pride about how they, and their immediate family members and relatives attended traditional public schools in their communities, and declared they had no intentions of seeking out other school options. As another *TPS pre-disposer* stated, “I wouldn't go to private school. I didn't feel like they provided the education.”

This pejorative sentiment toward alternatives to the local traditional public schools was especially strong among minority parents who participated in both individual interviews and focus groups. As mentioned previously, all private school options in the USCS recruitment area were established in the wake of federally-mandated school integration. That this history still plays into perpetuating a local predisposition toward traditional public schools among minorities in the USCS area was evidenced by several minority parents, as instanced in the following:

and then I can say it this way, I had some black people to say to me, “Why would you let your daughter go to that school?” Why not? Look, you may not agree with it, but I do. If we had more schools like this, maybe we'd have more black doctors and lawyers. People need to see it.

Problem perceivers. Focusing on the alternative to predisposition as motivating a school search, parents who did not display a predisposition for school type or for inherent engagement in a school search initiated a school search in response to either recognizing a problem related to their student's current school placement or by receiving information about USCS through passive means (signifying that the information about USCS was conveyed to them without effort

on their part). Parents who initiated a school search after receiving information through passive means did so by reading a letter sent to them by USCS, seeing USCS lawn signs or student transport buses, hearing about the school within their social networks, learning about USCS from their student, or via direct recommendations from the student's current teacher.

Parents whom I have characterized as problem perceivers described problems related to negative experiences with their current choice of school—including that their children's education suffered as a result of unmet individual needs—as primary initiating factors in their decisions to conduct school searches. Negative previous experiences included unruly or poorly managed classrooms; issues of perceived lack of student safety, including experiences with bullying or witnessing violent acts perpetrated by others; leadership failures; lack of rigor; and perceptions that school staff were failing to exhibit true concern for the student. As one problem-perceiving parent phrased it,

she was looking forward to getting out of [traditional school] and kind of the environment that was there. So she was very excited to have an option of somewhere else to go, possibly change scenes. I think it was about so many discipline problems, and the kids misbehaving, and being around that constantly. And teachers were very apathetic, and a lot of her teachers had chronic absences. She had some great teachers at [traditional school], but then there were some that weren't so great. And so it was a combination of just other kids, and the environment, and the administration, I think, was a problem there. So, she really was unhappy there.

Parents who initiated a school search due to problems related to unmet student needs described their students in a variety of ways. Some parents perceived their students to be quiet introverts who had difficulty making friends and were often bullied. As one parent phrased it,

we didn't really think that would be an option so private school and home school were the only two options. And at that point, I had looked into homeschool a little bit but didn't feel like that would meet his needs socially. He needed to be around other children because he naturally is not very social. So that needed to be something that he needed to have on a daily basis.

Other parents shared stories about how their students were academically gifted and receiving little challenge in the traditional school setting. As one parent stated,

I think all of us or a good portion of us, had students-- I don't know what the term would be, that were different learners, or I don't know, I always say, a little quirky. They were the traditional nerdy kids. They loved school. They loved learning. They challenged themselves without others challenging them. They were more of, at least the ones that I knew, were more of the gifted AIG-type students that were not being challenged in a traditional classroom setting, the way it had always been done. And so, I think the parents wanted to make sure their kids were challenged to their fullest potential.

Closely aligned with the lack of challenge was the perception on the part of several parents that their children's prior poor performance was due to a failure of the child's previous school staff to personalize instruction to meet his/her individual needs.

While to this point Phase I has focused on the predisposition or problem recognition of parents, parents were not the sole initiators of the school search process. In some cases, students pressured one or more of their parents to conduct a school search. Parents shared that their *student initiators* learned about the school from conversations among peers, through direct statements by TPS faculty to groups of students, by overhearing TPS faculty members' conversations, or by reading USCS information that was mailed to them. In other cases, classmates' parents, community members, relatives, or the student's current teachers initiated dialogue with the parent to suggest and encourage them to initiate a school search.

Phase II: Search Phase

There are three Level 2 questions (see Table 8) that relate to the search phase: (a) how do parents obtain information about available school options? (b) what information about available school options do parents obtain? and (c) how do parents interpret the information they obtain about each school in their choice set? The data pertaining to each question is synthesized in turn.

How is information obtained? Parents received information about the school physically, digitally, experientially, and through dialogue within their social networks. Physical sources of information included brochures, flyers, newspaper articles, and letters. Parents also mentioned seeing lawn signs around their community and USCS student transport buses on area roadways. Digital sources of information included the school’s Facebook page and website. Parents obtained strong experiential information through their attendance at recruiting events, non-recruiting events, and activities that were open to the public, as well as lottery proceedings, and events for parents held between the lottery and the end of the first month of school. Parents also accessed information through their social networks, which included conversations overheard or held with colleagues and clients during the course of their typical workdays.

Information about school options. Parents encountered information about USCS as an educational option both passively through no specific initiative of their own and actively by attending school events, conducting online research, and communicating within their social networks. Interestingly, many of the parents who participated in interviews for this study had researched other charter schools and other STEM schools in the state and even nationally. Since USCS was either just opening—or had been opened only a year—at the time when the parents in this study made the decision to enroll their children there, most parents talked about how the information from the external sites played a role in their decision making.

Interpreting information. Several themes emerged regarding parents’ initial interpretations of the information they received about USCS. Parents talked about the positive emotions displayed by students in photos and other media published electronically, and how the parents’ interactions with students, staff, and other parents during school events caused them to

perceive the school as warm, caring, inviting, and academically challenging. A theme of *community* emerged as a common description of parents' interpretations of the school's culture.

Another common theme related to interpretations of information was an uncertainty about the degree to which the charter school was a public or private venture, or a combination of the two. Parents sought information about admission requirements and interpreted the information they received as communicating that the school was opened for students who were well-behaved and seeking honors level opportunities, and several parents mentioned excitement at learning that their children had been "accepted" for admission to USCS. Information obtained about charter schools and STEM schools through online searches and personal dialogue was viewed as additional support for this perception of USCS as an exclusive institution with stringent admission requirements, in addition to the school's literal name. As one parent declared,

because they probably feel like the way I feel. I never won anything in my life [laughter]. So if you got 100,000 people throwing their name in the lottery, what's the chances of yours coming up? I mean, you got to feel that you have a chance [laughter]. And a lot of people may have thought like I did, where [student's] grades ain't good enough, so I ain't even going to bother with it. And I'm just as happy as I can be that she's in here. But I didn't think she had a chance of ever coming to this school. And in my mind, I was thinking that most of all of the smart kids' parents were putting their name in the lottery, which there was a lot of them that was...you might have had a few like me. And I mean Black. I mean kids' scores that they might have had. Thinking that this just for the smart kids. So they need to know that they have a chance.

While parents interpreted the school as a college preparatory institution, they struggled to understand the concept of dual credit. Dual credit is a program available in many states that allows students to count college and university courses for which they earn credit toward high school graduation requirements. Most parents were unable to describe specifically how students were able to take college courses while in high school, and how those courses factored into high

school graduation requirements. Many questions remained about the role of the school with respect to post-secondary course enrollment.

Parents spoke at length about project based learning (PBL), the primary method of instruction at USCS; however, most were uncomfortable with the term “interdisciplinary.” Every parent interviewed and all focus groups described the pedagogical approach as “hands-on.” Many parents, particularly parents of students whose historical academic performance was below the parents’ expectations, felt that the hands-on approach would be better suited for their students than the approaches they perceived to be most common among other schools.

Phase III: Choice Phase

There are three Level 2 questions (see Table 8) associated with the choice phase: (a) what push-pull factors do parents consider when making school choice decisions? (b) what factors influence parents to choose USCS? and (c) what actions do parents take to enroll their children in USCS?

Considering the first of the three Level 2 questions pertaining to the school choice phase, there were multiple push-pull factors that impinged on parents’ decisions. I discerned five categories of decision making factors from my study data: student factors, school factors, community factors, factors associated with the decision maker’s comfort with change, and factors associated with the decision maker him/herself. All parents who participated in individual interviews and all focus group participants discussed how the properties and dimensions that I discerned as associated with these categories affected their school choice. Full descriptions of the properties and dimensions of each of these categories is provided in Appendix G.

Student factors. Several factors specific to the individual student influenced parents’ decision making. When making school choice decisions, parents considered whether or not the

student desired to attend the school, and his/her level of happiness with his/her current school. Parents of students who were among the top performers in their previous grade levels considered their students' "love of learning" as a factor in their decision making, while parents of lower performing students expressed their fears that their students would not succeed academically and would not be "good enough" to maintain enrollment. This latter subset of parents also weighed the extent to which a "fresh start" might lead to higher academic performance. The student's past experiences with making new friends and how strongly leaving friends to enroll at USCS would impact the student's well-being were factors for most parents. Parents also considered how the school might help their student to become more independent and responsible.

School factors. Not surprisingly, there were multiple school factors (17 in all) that parents considered when making their decision to enroll their children at USCS, and these are listed in Table 12. I will offer a fuller explanation of each of these factors in this section.

Admissions process. The aspects of the admissions process that parents discussed starkly highlight the strong emotions involved in the choice process. As mentioned earlier, USCS admits students by unweighted lottery. Parents talked about the admissions process itself as an influencing factor. Some parents viewed the lottery process favorably, gratuitously considering an offer of enrolment as if their students were "accepted" to attend the school when, in fact, there was no element other than chance playing into the decision. Others considered not applying to USCS due to the idea that they were unlikely to gain admission, and that their students would be "heartbroken" if not offered admission. Considering the anti-USCS sentiment among TPS personnel, parents also shared concerns that, if their students were not offered admission, those students who returned to TPS would be treated poorly by teachers and staff.

Table 12

Summary List of Properties of the School Factors Category, Choice Phase

Property	Property
Admissions Process	Location
Challenge	Opportunity/Exposure
Connection to Careers	Personnel
Cost	Prepared for College
Curriculum	Opportunity/Exposure
Existing Demographics	Resources
Extracurricular Programs	School Culture and Environment
Facilities	School's Name
Instructional Methods	School Performance Grade
Length of Existence	Transportation

Challenge. The challenge theme related to the parents' desire to have their children presented with greater academic rigor than was being provided by their current schools. This theme surfaced in all individual interviews. Parents talked about how their students were losing interest in school because the level of rigor was too low to maintain their students' engagement in learning. As one parent portrayed his/her child's situation,

they challenged themselves without others challenging them. They were more of, at least the ones that I knew, were more of the gifted AIG-type students that were not being challenged in a traditional classroom setting, the way it had always been done. And so I think the parents wanted to make sure their kids were challenged to their fullest potential. Moved up possibly, if grade-wise or subject-area-wise, if they excelled in a certain subject. Looking for that that [sic] they could be challenged in those areas, not just the traditional curriculum. That they did go above and beyond and were challenged.

One target parent (for the sake of convenience, the term "target parent" will be used subsequently as a proxy for "parent of a target student's family") cited her negative experiences with TPS in seeking greater challenge and access to rigorous coursework for her student's sibling as a core factor in her choice of USCS:

I did not want her to go through some of the things that my oldest child went through at the high school. As a parent, if you do not stay on the guidance counselor, if you're not visible in the school, a lot of times these Blacks would tend to be overlooked. And I saw that at [TPS]. That's what happened with my daughter with the guidance counselor. And she said, "Well, I've put a note on her chart to flag it, to call you in." My daughter was in the 10th grade just taking Honors courses and she was excelling over a hundred on her classes. I don't understand. But you never told her let's boot you up to AP? So if I didn't constantly pop up at the school, I actually got to go to the school board, slip into his office, yes. And they approved for her to take college courses at [community college], that's the only way. Number five in the class and you don't present something or put something on the table that can kind of advance or push her a little further? And I felt like that the need—I felt like that's what we would do here, right here [laughter]. That's what I'm hoping for.

Curriculum. All individual interview participants and both focus groups spoke about how their students' potential access to free college courses played into their decision making. This component of the school's curriculum (college courses) and STEM-specific course

offerings emerged as pivotal decision-making factors. Parents talked about how the availability of specialized courses not offered by TPS, such as aerospace, programming, and robotics, differentiated USCS from other schools.

Instructional methods. All individual interview and focus group participants shared how the USCS approach to teaching and learning influenced their school choices. Parents referred to the USCS pedagogical framework as “hands on,” “different,” and “real world,” in contrast to their students’ experiences in TPS, homeschool, and private school classrooms. For instance, one target parent opted for a setting that would differ from a traditional learning environment

because she likes making things. She likes anything to do with engineering, building, anything that's hands-on, she liked to do. And in looking through things to talking with someone whenever I called out here, they even get a little bit on how things kind of worked a little bit. So it made me really interested, because in the school she was at, it was kind of like just sit at a desk all day long and that's it. I just loved how I saw all the kids out of their seats and they were doing things. And I like that a lot, so that kind of swayed me and my husband to both want her to go.

The desire for instructional methods that place educational standards in contemporary contexts also appealed to parents

because it's different. It's different. He's not being taught things like happened 100 years ago, that don't really matter. One of the things I'm really intrigued by is the projects that they do. Because he did that-- well, one of the things I was-- most recent was that Flint, Michigan project. That was really interesting. And one of the things too, that he takes from those projects, is information like the effects to those people, for just that particular project in Flint, Michigan. I mean, this is real. This is not something you don't really know about. This is real.

Connection to careers. The extent to which USCS supports students’ development of career-oriented skills also factored into parents’ decision making. Parents did not mention specific courses tied to the school’s major career-specific themes. Instead, they spoke often about how the school would help their students develop what many have referred to as *soft skills* or *life skills*, such as public speaking and presentation skills. There was a pervasive perception that the

school's focus on *life skills*, combined with an expectation that every student would complete one or more on-the-job internships, would better prepare students for successful careers after graduation, in comparison to other schools' focuses.

Prepared for college. All parents expressed a desire for their children to attain a post-secondary education, and they perceived access to college courses, USCS's location on a university campus, and the academic rigor offered by USCS to be better suited to prepare their students for this future, in comparison to other school options. Parents cited as indicators of rigor the amount of homework currently enrolled students spoke about at recruiting events, the school's emphasis on writing and presentation skills, and the ways teachers used technology in instructional delivery.

Opportunity/exposure. Parents described the option to enroll a child at USCS as an "opportunity," or as providing students with "opportunities" and/or "exposure," thereby raising students' awareness of cultures, careers, or college. For one parent, "exposure" was manifest through interactions with advanced technologies, internships, and interactions with university professors, declaring that

I mean because for him, he had to bring a drone back to school today, where he was working on. He wouldn't been exposed to that at another school. He just really wouldn't, so. Like, he was telling me about two internships, which one of them, the guy wants him to take the CCNA test. And I had just been—I was looking for stuff for him, and I had ran across that online. And I was going to talk to him about trying to start taking that program so he could take the test. And then he was telling—I think he said it was a couple of guys that work with him, and they ended up passing the test and going on to get jobs in the field. I mean, that would just be amazing to be straight out of high school and going to do something that you like.

Other parents spoke about opportunities and exposure related to USCS's incorporation of place-based learning activities. One parent reported that

she's talking about they went to the museum and they're starting the fish tank thing they're doing. Or the pow wow they went to and she's able to talk about everything that

she learned there. That's really cool stuff. Besides, I remember whenever I was younger we just read in a book [laughter] about what the Indians did and that was it. I think it's really neat to see her to be able to talk about, "Well we learned how their houses are built, and we saw how it was done, and we saw they made their tools and we saw how they—" And all we had was a book of okay there was skins on the house. And that's what we read. She's able to see this stuff and she's going to remember the stuff. So that's amazing to me.

Attendance costs. Costs for attendance, such as tuition and books, were mentioned by all individual interview participants and focus groups as being a factor under consideration, and many of the emails related to enrolment provided by USCS contained questions about tuition and other fees. Though USCS operates as a free, public charter school, parents questioned what types of fees the school might assess beyond tuition, such as transportation fees. In addition to fees that may have been assessed by the school, parents also considered costs they would incur in order for enrollment to be a feasible option for them. For instance, parents mentioned having to drive some distance to transport their student to a bus stop, or pay for a private transportation service altogether, so that their student could enroll. There were also questions about the cost of college courses and textbooks, which, in fact, the school provides at no cost to its students.

Existing demographics. Parents' perceptions of the school's projected (Cohort 1) or actual (Cohort 2) student demographics were a factor for target and non-target parents. Parents perceived the students who were enrolled at USCS, and those students who were most likely to enroll, to be students who were dedicated to learning, children of involved and supportive parents, and children who were well-behaved. As one parent commented,

I think that it's for students who, like my son, have a desire. They want to learn but for some reason, in the public schools they get too much of a distraction, and they might want to be somewhere where there's less people. It's for kids that want to learn and then want to do something different than what happens at public schools. And I mean that was the reason why my son wanted to be here, so he could focus on educational stuff and not be distracted. To be with other students like that. I think this type of school would be a better situation for him too, with...like high-performing students. That's what I think.

In fact, some interview participants shared their surprise after learning that some of the students who enrolled at the school did not fit this stereotype. Parents also made references to other demographic characteristics, such as students' race/ethnicity and socioeconomic factors, as impacting their decision making. For example, one parent commented

and I would say these are White, and Black, and Indians at my house studying together [laughter]. And it made no difference between the two. They were trying to reach a goal. But this school has taught these children to work together as a different race of people with different ideas, and you can take what you have, and you can take what I have, and that we can take when we come together, we learn something about each other. We're no different, but we're different. And that's what we got to have.

In contrast, other parents shared details of conversations with parents of target students that conveyed a perception of the school as being developed to serve, predominantly, a single racial or ethnic group, such as this perception shared by an African-American parent:

Some feel like it's based for not so much African-American students, for Caucasians. And they feel like, a lot of times, children are not—they see favoritism. But I would beg to differ. You're going to have challenges everywhere you go. I mean I work with different denominations, different people, ethnicity, I cannot stop. You just can't stop, you can't. And I tell my daughters just because you're faced with that it doesn't mean that you bow down to that.

To expand on this point, another African-American parent said

... it this way, I had some Black people to say to me, "Why would you let your daughter go to that school?" And I said, "Why not?!" If people would've went to that exhibition, they would've saw the things that y'all are teaching them that, maybe, we might have more Black scientists and more Black doctors.

Extracurricular programs. USCS differs from many TPS, and all other public schools in its recruitment area, in that it does not operate formal music or athletics programs. Parents perceived the school's lack of band and athletics programming to be a strong influencing factor for families. When expounding upon this factor, one target parent shared

I have a lady that I work with right now that her granddaughter is just like my son. She half performing and she don't like how it is in a public school. But her only problem is, she in band and she don't want to—if it was me, I would probably make her. But she was

like every time she asks her about it, she don't want to come because she's been in band. She in like sixth or seventh grade and she wanted to be in the band. So when I said that the school doesn't have a band, she didn't want to switch. So I think that, too. A lot of kids wanting to able to do their little extra activities.

There was also evidence of a perception that the push-pull influence of extracurricular activities was particularly strong in the local context of USCS. A target parent who was new to the area said

what I've noticed down here in the South, they're so big on sports. And if the sports are not here, they'd rather stay away. Because sports is not where the world—everyone is not going to be a sports figure. Your child has to have something to fall back on. But they're not seeing that. I talked to one parent on my job, and she was like, "Oh, I might look into it," and this and that, "No, but my son wants to play sports at Northeastern." But, okay, he's playing high school sports. He may not go to college sports. He may not go to the NFL, but what is he going to have then after? I say you promote education before you promote sports. Everything down here is Friday night lights [laughter]. Basketball, everything is geared towards sports down here, and I'm like, "I don't get it. What about the education?" I mean you will have parents and grandparents in droves come out for sports. But when it's time to come to education, nobody wants to come out.

Location. The location theme consisted of two dimensions: proximity to home and college campus. The physical distance between USCS and the parent's place of residence, and USCS and the parent's workplace, surfaced as a factor in the decision-making process, as some students were domiciled in locations that required a commute of 40 minutes or more, to and from the school. (Implications associated with the location theme in the context of proximity to home are further explained in the transportation theme.)

Parents viewed USCS's university campus location as preparing their students for college success:

No, but I just like the fact that it's on [university] campus...[male student] always tell me he feel like he a college student [laughter]. So he get the college experience in high school, so it definitely make me feel better when he actually go to college, because he'll know some of the routine just from being here. Because he got to know to be at this building, or, you know. So it's really a good experience for these children. That's another aspect, too. Just being on this campus.

Other parents shared initial concerns related the sheer size of the campus in comparison to the students' small, rural school settings, commenting that

and that its so big. We were worried about college and maybe him possibly going to a smaller university versus a larger, or even a community college. But to watch him and classes in different buildings at such a young age, it's blown us away because it's something we were unsure of if he was going to be able to do. And he's doing it and doing it several years earlier than we thought he would be doing it and loves it.

Transportation. As mentioned earlier, school transportation was a factor for some parents. USCS operates a fleet of school buses that transport students between centralized bus stops and the school. The same type of door-to-door school bus service provided for students by the public school districts in the area is not available to USCS students. Due to the school's rural location, there are no other public modes of transportation capable of getting students to and from the school each day. This school factor was perceived to be a barrier for potential applicants.

Facilities. The facilities theme refers to the physical buildings within which USCS is housed. As stated previously, USCS is located on a university campus. Students attend USCS classes in the university's lecture halls and specialized science and engineering labs, and they access the university cafeteria for lunches. The condition and age of the physical buildings used by USCS has varied by year, as the size of the school has grown. These variations in building assignments surfaced as a consideration for parents who felt that the general condition of the facilities in use by USCS declined from the first year of operation to the second. I will explore the issue of physical facilities further in the next section.

Resources. The resources theme refers to the physical assets of the school, such as laptops, lab equipment, and furniture. Parents in my study considered the physical resources that would be available to their students when making their school choice decisions. All parents

interviewed mentioned the USCS's 1:1 learning environment, wherein each student is provided no-cost access to a laptop computer for use in all classes and at home. As this parent shared, their choice was influenced by

the technology here, having the Chromebooks. Of course, my kids have laptops, but being able to use them in class was a bonus. I think that what we know, that's where we need to be, what we need to be doing and used to. And I think being able to use them in class as tools to do their homework and assignments is really beneficial to them. I think it gives them a leg up when they go to college.

For other parents, *resources* extended beyond the 1:1 devices to include access to tools used for

building chairs and robotics and stuff like that, they don't get that in the public schools. And I felt like that was awesome for my child to be able to go to the computer, work it out, do the printout, and can print the item out. Just different things that she'd do with the computer. Like I said, for her to have to knowledge of the calculus and the stats and all that.

Permanence. The fact that USCS did not yet physically exist (Cohort 1), as well as doubts about how long the school might exist (Cohort 1 and Cohort 2), impacted parents' decision making. Media coverage and TPS officials brought into question the permanence of the school. For instance, a local TPS superintendent contrasted TPS accomplishments and position in the community with "what might be" in reference to "the public charter school" (see Figure 3). Parents spoke about the length of the "new and unproven" school's existence as a major concern for them, and as a deterrent for some of their peers.

Personnel. The personnel theme refers to the reputation of USCS leadership and the certifications, prior performance, and/or credentials of the school's teachers. USCS recruited and hired a well-qualified teaching staff just prior to the first year of operation. Sixty-seven percent (4 of 6) of the teachers hired by USCS were current or former Teachers of the Year at school and

[Redacted]
Schools Superintendent

[Redacted]

To the Parents/Guardians of:
[Redacted]

Dear Parents,

I hope that you are having a great summer with ample opportunity to spend time with friends and family relaxing, rejuvenating, and recharging as your child prepares for another exciting year of school. I have received information from [Redacted] the Chief Executive Officer of the [Redacted] that your child has been selected to attend the charter school in [Redacted].

I am happy that parents have options when it comes to their child's education and appreciate that parents want the very best outcomes for their child. Making a choice about where a child might receive the best preparation for life beyond school, whether that is a future that includes an Ivy League or state university, a community college, the military, or a move directly into the workforce, can be daunting particularly when marketing materials begin showing up with promises of what might be.

I would like to invite you to join me for a conversation about the exciting things that are happening and are planned at [Redacted] and [Redacted]. We are proud of the accomplishments of our graduates. For example, the Class of 2015 set school system records for graduation rate, college scholarship dollars received, and the number of college hours earned while in high school. There are also students in our incoming senior class who are on track to earn their two-year college degree in April before earning their high school diploma in June.

Please consider joining me on Monday night, [Redacted] at 6:00 p.m. in the Media Center at [Redacted] High School. The school principals will also be on hand to answer questions and address any concerns you might have. It is an honor and a blessing to serve the children of [Redacted]. We are committed to giving our all for our students and their families.

Regardless of where your child attends school next year, I wish your family the very best of luck going forward. If there is any additional information that you may need as you make choices about your child's education, please do not hesitate to let me know.

Warmly,
[Redacted]

Figure 3. Letter from local school district.

district levels, two were certified at the Master's degree level, and three were certified by the National Board for Professional Teaching Standards. As mentioned previously, the school's board of directors included a former local superintendent of schools, university professors, and county commissioners, in addition to other individuals who were held in high esteem in the local area. Parents, like the one quoted below, spoke about the strength of school personnel as a major factor in their school choice decision:

how I found out about the school is I had a friend that worked under [mayor]...and...she spoke so highly of him and knew that if he had something to do with it, then it was...it was going to be pretty spectacular.

Parents cited the strength of USCS teachers as a counterweight to concerns over its permanence. For example, one parent philosophically mused that USCS was

just something new. I mean, she'd been with the same kids since she was a baby and, I mean, a brand new school. The fears of what if it doesn't stay open? What if it goes a year or two and then it collapses? Knowing the staff that was here, I felt really positive because I knew [leadership] and I knew several of the other staff members. I knew how successful they had been.

School culture and environment. Properties of the school culture and environment theme included small class sizes, student safety, family-like environment, across grade level interactions, elements of organizational identity (mission, vision, philosophy), and care for students. Of these properties, the presence of a positive, family-like environment and care for students were of highest importance to parents. One parent described her euphoria following a recruiting event in this way:

I felt like holding his hand and skipping as we left because of just how positive all of the staff was, every single person that we were introduced to, and they were just so excited to be there, and to tell you about what they were going to teach and the students are learning. Even the students made you—I felt like we were skipping on the way out. It was just such a positive experience every time we left.

Parents were especially attuned also to the potential impact of positivity and excitement on their own children's performance:

I think a positive environment. Energy, enthusiasm from the administration, from the teachers, from the students. What I've found with my kids is they kind of adopt the attitude of the teachers they have. And if they have teachers that don't care, and are only putting in the minimum, my kids are only going to put in the minimum. If they have teachers that are excited about what they're doing, and are inspiring them to learn, and encouraging them, they're more likely to work and to try to do good, and stay enthusiastic about school. So, I think the attitude is one of the big things that we're looking for.

The impact of teachers who express care for students was highly valued—especially when that care extended from the full class level, as shown above, down to the individual student:

Caring about children and not just seeing them as another number is really important. I think to a lot of parents just seeing my child—you understand there's a lot of kids, but being able to—be able to help a child and not just see them as there as someone in a seat is what a lot of parents looking for.

Community factors. Community factors were highly pertinent to the culmination of the school search process, and weighed heavily on some parents' decisions to enroll their students at USCS. Potent negative themes of “outcast” and “shame” emerged, although, by contrast, some parents perceived their school choice decisions to be supported within their community. One parent with a child enrolled at the traditional public school and another at USCS shared this poignant, but not uncommon, experience:

Well [laughter], last year's graduation, [the principal] stood up [laughter], and he used it as a forum and got in big trouble saying that we're just as good as that STEM school. And I was like, ‘God.’ I was shrinking in my chair [laughter]. And I have taken...because I'm involved with the [TPS] band club, the band teachers are always saying, ‘We're losing kids to the USCS School. We're only 73 and we were 89.’ I'm like, ‘Maybe it's just that many.’ And I've heard things like, ‘The USCS School is taking money that could go to the public school,’ and I just kind of just shrink in my chair. And then I kind of...it puts me on the defensive, like I cannot brag in that forum about how good my child is doing. And some of it I think it's just ignorance on their part, that they can't see what the school brings to the community. And that's probably just all I've heard, and you hear it over and over again, and I just zip my lips [laughter] and...and part of me thinks that those who

Speak out and say negative things, either their child did not get in. You're going to get negative because this school came in and changed the way you school your children.

Nearly all of the negative community pressure was perceived by parents as emanating from a commonly held belief that local TPSs were adversely affected financially by USCS due to a loss of TPS funding caused by USCS enrollment. As one parent reported,

when I look at politicians, which I know a lot of them because I'm always out there and stuff, they feel like it's taking away from the public school. And I'm going to use this statistic as an example for every kid that you have here, that \$7,000 taken away each year from the public school for each body you have here. And I think it was, I want to say last year, year before last, one student left here and went back to public school. They feel like they're teaching her for free because they're not going to come back and give back that \$7,000 that they lost, because she came out of the public school system. So they feel like this is money being taken away from the public school.

Of the 19 parents interviewed, four were current or former employees of local TPSs. For this sub-group of parents, the influence of community sentiment toward USCS on the decision-making process was especially strong. These parents shared several stories of their own, as well as stories from colleagues who ultimately made the decision not to enroll their children at USCS due to community pressures. In the words of a former local TPS teacher,

And I do often wonder, though, if I was still teaching in [TPS]—which we've had several people who did not apply because they thought it would affect their jobs in [local county]. Several have come to me, of course, I was out of the school system by the time we applied with [my student], but several people who were still affiliated were worried that they'd lose their job. In fact, they were to the wire on turning in their 'Yes, we accept' kind of thing because they thought it might affect. But you would hope it wouldn't, but you have evaluations, and are they going to think about those things that your kids are not in the school system? Yeah, definitely. So ultimately, they decided to bring their children here [laughter]. But it was and is, still, to this day, difficult for someone who's still with the school system.

Comfort with change. Parents discussed a general fear of or reticence to change, of any kind, both within their social networks and the broader community. Participants perceived the presence of USCS to be a substantial change for the community and their peers, and they

referred to the decision to enroll a student at USCS as taking a risk on a new and unproven school. One target parent spoke about this aspect of decision making in this way:

then you got to think about this is a small town, so you got to come at it with a different approach. I say that because I worked at a bookstore in a small town; people don't like anything different. They just want everything to stay the same. I guess you got to think of a different approach to come at them without actually saying it's different. Maybe. I don't know how to do that [laughter], because people when you say different around here, they just, they don't want change, so.

Decision maker. The level of responsibility for school choice decision making that each parent assumed varied. Beyond this, the extent to which the child was involved also varied. At one end of the spectrum, parents took sole responsibility for making the decision to enroll their child at USCS, without discussing the issue with their child prior to enrollment. However, these parents were in the minority. At the other end of the spectrum, parents referred to the decision as being left to the child to make. In all, 14 of the 19 parents who participated in individual interviews viewed their child as playing a role in the decision-making process.

Choice factors that influenced parents to choose USCS. Distilling all that has been discussed above, overall, my analysis of the data suggested that parents regarded eight factors as positively influencing their decision to choose USCS and five factors as negatively influencing their decision. Positive, motivating factors and negative, detracting factors are shown in Table 13.

Phase IV: Outcome Evaluation Phase

The fourth step in the HSCM, outcome evaluation, encompasses the time period after the parent makes the school choice decision. During this phase, parents self-evaluate their school choice decision as positive or negative for their student(s). Similar to the choice phase, student, school, and community factors emerged as three major categories by which parents evaluated their decisions to enroll their students at USCS.

Table 13

Major Factors Associated with School Decision Making Among USCS Parents

Positive Influence	Negative Influence
Student-driven	Facilities
Positive environment and school culture	Transportation
Passionate professionals	Leaving friends
College credit	Lack of athletics and band
Prepared for college	New and unproven
Prepared for life	
Opportunity/exposure	

Student factors. Parents described seeing their children grow in terms of academic and social development while they were at USCS. Parents placed an emphasis on activities and experiences that led to increase in confidence being displayed by the child. Parents also mentioned comparing the content of their conversations with their children after enrollment to the content of their conversations prior to enrollment. As conversations began to shift toward sharing learning experiences in contrast to specific incidents of mismanagement (e.g., fights and the use of profanity toward educators by students), the strength of the positive perception grew. Parents mentioned conversations about specific topics discussed in class and real world issues—in addition to specific instances of times when school personnel showed that they cared about their child.

Some parents also viewed positively their child's perceptions of being academically overwhelmed. They equated a sense of "being overwhelmed" with being challenged in the classroom, a feature many parents were looking for in choosing a school for their children in the first place. One parent shared her perceptions related to her child's feeling of being overwhelmed in this way:

so this has got to be a pretty good place, because I haven't heard him say any bad thing except for when he first got here: "Ma, it is so much work [laughter]!" But that's what I want to hear. So this is a good place for me.

Another parent shared this example from her student's experiences of being challenged:

I mean, she's struggling, her grades-- not struggling, her grades, she made a C, her first C in math this semester, or last semester. But I said, "You know, we hate she's going to have that as her first grades that count on her transcript," but, at the same time, when she's going into colleges y'all's rigor is so much higher. I mean, y'all's C would have been her A somewhere else. So, I mean does that stress me out? Yeah, stressed me out. She's going to have a C on her transcript. But, I said I think when it gets to that point, they'll see that that rigor is there and the things that they've done in the grand scheme of things, I don't think it will matter. I know she's learning more.

Overall, the students' perceived level of happiness emerged as perhaps the largest determining factor in the parents' outcome evaluation of the decision to entrust their children to USCS. Parents wanted their children to be happy, to be self-confident, and to reconnect with a joy of learning. As one parent stated:

I mean, he talks about it to his friends. He's constantly, wherever we go, telling people about his school and what he's doing at school. Which, when the child is happy the parents are happy. And he's definitely happy with his school experience.

This perceived level of happiness factor was strong for both target and non-target families. An example from the comments of a target parent is

it's just a positive feeling. It's a good feeling. And I would just go on how my son comes home and how he feels. He comes home enjoying school. I mean, he talks about school as soon as he comes home. He's very hard on himself, so if he doesn't do well, it affects him. But here, he's not like that. He's a totally different kid here.

Similarly, a non-target parent commented that

I...he was not happy at public school. If he...if you're not happy in where you're going then you're not going to put forth an effort in what you're doing and I wanted him to be happy coming to school. I wanted him to feel like he mattered when he came to school, like he just wasn't a kid in the class. You know that's a terrible thing to drive up and...tell your kids to get out of the car and you know that they're hating every single minute of it. And now...never did [child] say, "I don't want to go to school." He was always...you know...may not always do his work, but he's always wanting to come now.

On the other hand, some student-related factors negatively influenced parents' evaluations of the outcome of their decision. These factors included that a student struggled to adapt to the use of technology and the instructional approach of teachers at USCS. Additionally, some students expressed concerns about whether they fit in the new school, and they were unhappy about having to leave the friends they had sustained or made at their previous schools. These peer friendship factors were especially strong when viewed through the lens of the rural context. For many of the parents interviewed, students were faced with attending a school where a very large number of students were from other schools. While this may be less of a factor in the

urban setting, it was noteworthy here. Students in the rural context are often with the same group of peers from kindergarten through high school graduation. Several of the students had shared classrooms with the same group of students for nine years, only to be placed in a setting where they knew few, if any, classmates. For the first time in their educational careers, they were faced with having to make new friends.

School factors. Multiple school factors contributed to positive evaluations of USCS, including personnel who cared about students, other students who displayed happiness and pride in their school, and the frequency and content of teacher and school communications with the home. Other factors included that the school is driven by students (e.g., students have a voice, students are cared for, student voice is encouraged), and that adults in the building appear to be making decisions because they are focused on individual students and the student body collectively, both inside and outside of the school day. In relation to this holistic approach to caring for students and their families, one parent shared confidently

that our kids are going to be cared about. It's a school system. Because I know we went through some issues when the storm came. And we were really shocked that people actually cared. It wasn't that, "Yeah, sorry about that but anyway." People care, and that's what you need, especially in a community like this. People are going to care about you and your child, and that's what's important.

School personnel were perceived by parents as extending this general level of care to each individual student. One parent mused that

I can't make decisions for every family, but I definitely think it looks at your child and what your child—that [USCS] looks at your child and what your child needs and works very hard to meet those needs. That they treat them like it's their responsibility, this is their education. They're driving their education.

Parents referred to the level of excitement and positivity demonstrated by school personnel as rising to the level of a passion:

I have met with the teachers. In fact, when we had the parent teachers conference, I met

with all of them. I sort of said, "Well, can we just all meet at one time, to [laughter] save time?" And they all sort of came in around the same time. And I've not met teachers that were so involved with their students. You know how people always say, "I have a passion for this?" Yeah, they have passion for this.

From the perspective of student academic engagement, positive factors included that students worked in groups and that they were encouraged to work together—to assist each other—and to function as one would on the job. An additional factor was the sense of community across grade levels to the point where the school feels like a close-knit community. This last factor may be important to consider when thinking of the rural context, in that the TPSs in these areas are schools within communities.

Community factors. Parents also considered community factors when evaluating the outcome of their decision, and these factors were especially strong for *natives*—parents who grew up in the USCS recruitment area—and current and former TPS educators. A native former educator shared this especially powerful story of engaging in an event held by a local TPS superintendent for parents who chose to transfer their students' enrollment from TPS to USCS:

Well, we went to that forum. Do you remember, that [superintendent] did? I think it was the second year. The first year they sent out letters and tried to get you to...I think it was just, stay here. Well, we felt a little shame—[long pause]—from the community. You know, you're stealing their money. Taking it out of the community. And that's not, obviously, my goal. Makes you feel kind of bad, because I was an educator and I know what it's doing to the public school system. And it is pulling money. But I feel like, as an educator, we'd been working on things, that they need to work on to meet these kids' needs, for years. And all the money's been funneled into low socio-economic and getting kids to pass. And my kid's needs weren't getting met. I feel bad even saying that but I mean, I was there [laughter]. And I know what we focused on because you only had a certain amount of money, and you had to put it where it was most needed. I went to the forum, and I mean, I cried when they interviewed me. I teared up. Because you're torn. You want what's best for your community. And I know it hurts. I mean, I think I'm kind of tough [laughter], you know? And to a point, you don't...I mean, I'm doing what's best for my child. If it comes down to it, then I'm going to defend that. I absolutely feel like this is the best fit for my kid. Yes, I think it's still out there. I think there's some...feel almost like a traitor, especially with the fundraising, and not feeling welcome to do fundraising at the high school. Whereas, I still bought mums from the middle school, and I still support the public schools, you know? Anything that they do, I probably do some

more than I did before because I want to make sure that I'm...you know? I'm not a traitor, you know? I just want us all to work together. But I think so, yeah, I hesitated...[my husband's] got his USCS sticker on his car. I don't have mine on my car. Not that I'm not proud, but I mean, I've worked in the community and I need business from the community, and I need their support. So, I feel like there's a little stigma, like we're not good enough.

Interestingly, interview and focus group participants contrasted community sentiment toward parents who chose private and homeschool options as alternatives to TPS versus parents who chose USCS. For example, another parent who was a former TPS teacher stated the contrasting sentiment in this way:

You're not just either at [TPS]...and then that also makes me think back to, I don't feel like we make the kids that go to [private school] feel, the same as they make the kids at [USCS]...but maybe it's the money, because I feel like the community has made sure they put it in the newspaper, they put it...it's out there. I know teachers...I'm still friends with teachers that go the [TPS] convocation. I mean, it's brought up, how much money we lost to this charter school. So, it kind of feeds the "Look what they're doing, they're taking your money. We have less." I don't know how to solve that one.

The gravity of local anti-charter sentiment in the context of USCS outcome evaluations was not limited to natives and educators. Non-native, target parents also communicated negative experiences that caused them to question their decisions to enroll their children at USCS. For example, a target, non-native parent shared that she

talked to one of the teachers at the school because they didn't like it. Because even when his teachers were like, "The grass ain't always green on the other side." I'm like, "Why would she tell--" because at the time, I think he was 12, 13. I'm like, "Why would she tell my child that?" But, yeah, she was like, "Oh, yes, charter school," and blah, blah, blah. And then I got that letter, and when I went in, and then I told my son, "Don't pay the teachers no matter." Because he was excited. He going to tell them, "I'm not going to be here next year [laughter]." And then I guess they were getting upset like, "What? What?" So, yeah, that's what it was. I was asking them. Because the pamphlet came from [TPS] saying that [USCS] wanted his information. So, yeah, I called them and they told me about it and they weren't happy about it. And they just kept saying little smart stuff to him, which, at one point I was getting ready to go out there and talk to the teachers because I'm like if this is a problem with how you talk to me, I don't like for them to be saying stuff like that to him.

School Choice Process Differences between Target and Non-Target Parents

At this juncture, it is imperative to abstract a little from the wealth of data provided by the parents and teased out in the above in order to consider overarching perspectives—particularly as they relate to the difference between target and non-target parents at each of the choice process phases.

Phase I: Problem Recognition/Predisposition Phase

Target parents mentioned not having access to information about USCS because there was less information available in their networks (“nobody really knows about it”). As mentioned above, some were conscious of receiving a letter about the school, or seeing a USCS student transport bus or road sign. They spoke about having insufficient time to explore school options because of their jobs, family obligations, and other commitments that prevented them from devoting time to a school search. For example, one target parent said

I mean, none of the friends that I had-- I never heard any conversation from them. After he became a student, I talked to some other people about it, but prior to that, there really wasn't any. I mean it was just really by chance me seeing that post. If I hadn't seen it...I probably would have never made that choice either because I wouldn't have known about it.

The dearth of information circulating in the social circles of the target population was in stark contrast to the situation reported by the typical parents of the non-target population:

Actually, [one of my friends] sent out something through Facebook. And we had been childhood friends. And so it just came across and [my student] was at the point where we had already been concerned about the local high school. Well, it was definitely a buzz in the area, something new. This is something that had never happened in our area before.

This comment implicitly invokes the fact that, in general, non-target parents were more likely to mention that a specific need of their child was not being met as a reason for initiating a school search. There were specific differences also between the target and non-target parents in the remaining three phases.

Phase II: Search Phase

Non-target parents were more likely to conduct intensive, active searches than target parents. Non-target parents attended a variety of recruiting events held at the school and other locations throughout the recruiting area, sought opportunities to tour classrooms during the school day, took action to call friends and to connect with others who had children at the school to ask questions, sent multiple direct emails to the school to obtain information, and scheduled multiple meetings with school personnel. All non-target parents conducted Web searches that included the websites of other charter schools, state and national charter organizations, media coverage related to charter schools, and all of the digital information communicated or otherwise made public by USCS, including its school website and social media pages. For example, one non-target parent described her search like this:

I started researching when the next get-together seminar was, and that's how I found out it was on a Tuesday night. And [son] and I had went and showed up. I wanted him to be involved in it. And so that's how I found out. I was engaged in figuring out—starting to do a lot of research to figure out what it was all about. I worked at, then, [employer] and I talked to [co-worker] about it. I took all the brochures that I could get [laughter] because I was reading. Then there started to be articles about the [USCS] in the paper. Read about that and how the school is coming to be and what it was going—math, science, and engineering. And so every article I would find, I'd say said, "Read this, [son]. Read this." Went to school, filled out the forms. We handed them in. And just took it from there, and every time something would come up, him [sic] and I would be there trying to learn. I learned a lot, then I learned more the more engaged I got into the school.

In contrast, searches conducted by target parents were less extensive and intensive. While target parents sought information online, they generally viewed only the resources published by USCS, unless information about the school was presented to them through their previously established social media networks. When target parents attended recruiting events, those events that they attended were in close proximity to their homes or places of work, not at the school or during the typical school day. Communication about the school between non-target parents and

the school, and between non-target parents and parents of students who were enrolled currently at USCS, was much more frequent than was the case for target parents. The typical search conducted by a target parent was along the lines of this narrative provided by a target parent:

Well, I heard about it kind of oddly. Where we live, directly across the street, there was a little, what you stick in the ground, a little advertisement like that. I mean, I could see it every day when I walked outside. I mean it was just really by chance me seeing that post. If I hadn't seen it, and then hearing his teacher reiterate it, saying it again to my son. I probably would have never made that choice...because I wouldn't have known about it. But I mean, it [lawn sign] was just like I said, just right there, and I ended up calling and just going from there. The thing that really interested me was he had the opportunity to have an associate's degree when he graduated, so. And then you had teachers to actually recommend him to come in also because they knew how interested he were [sic] in technology. So that was another plus. That's what really got a ball rolling with us.

Phase III: Choice Phase

Target parents were more likely to talk about issues with the admissions process. Several parents shared their lack of understanding about the lottery including using as a point of reference the observation that he/she had never won anything in his/her life, that he/she had no chance of admission, and problems with the process itself (losing paperwork, etc.).

In addition, extracurricular activities appear to be a bigger factor for consideration among the target population. Whereas non-target parents may have the means to involve their students in events outside of school, and so to supplement what the school does or does not offer, parents of the target population were more likely to rely on the school to provide those opportunities. Not having extracurricular activities provided by the school was a major consideration for target population parents, and they mentioned that many parents within their social networks did not choose the school due to this factor.

Transportation was a factor more for target parents than for non-target parents. Individual interviews and focus group participants discussed the transportation challenges of getting students to and from USCS and the sacrifices necessary to make attendance feasible. Parents

discussed how the lack of door-to-door transportation effectively prevented enrollment of additional target students.

Non-target parents were overwhelmingly more likely to discuss their child's unhappiness at his/her current school as a major reason for choosing USCS. Often, these concerns centered on safety issues, lack of challenge or attention to students' specific needs, or lack of enthusiasm from TPS personnel.

Target parents were more likely to perceive themselves as the decision makers versus their students. Many target parents shared stories of how they forced their students to attend because they recognized the opportunity that the student would have at USCS. Target parents saw this as their child's chance to attain a college education through having a teacher who would pay more attention to their child.

Phase IV: Outcome Evaluation Phase

Target parents who were persuaded by their child to apply for enrollment at USCS discussed how the school was student driven. They shared experiences wherein they noticed how personnel spoke about their child, stories their children shared about how their teachers answered their questions and took notice of them, specific instances of how an adult listened to them and took action.

Every target parent talked about how the child gained confidence and came home happy about school, and they interpreted this as a major positive indicator of the impact of their decision. This was also a major positive indicator for most non-target parents too, but it was a pervasive factor for target parents.

Much of the discussion regarding outcome evaluation with non-target parents mimicked the discussion with target parents. For example, both target and non-target parents were confused

about how charter schools related to public schools, how they differed from private schools, the admissions process, and the cost of attending. Non-target parents also were seeking challenge and opportunity for their students, and wanted passionate, qualified teachers who cared about their children. They also wanted their children to be confident, happy, and prepared for the future, and they relied on digital media and networks for reliable information. In general, parents made the choice, but the impact on their students was a large factor that played into their outcome evaluation.

Marketing Mix Strategy

As stated earlier, the key elements of the 7 Ps marketing framework are: programs, place, price, people, process, physical facilities, and promotion (Kotler & Fox, 1995). Just before USCS opened, its board of directors contracted with an outside agency to assist with the development of the initial marketing and communications plan. This initial marketing plan was not specifically aligned to the 7Ps framework. USCS provided a copy of this plan to the team tasked with creating the new marketing mix strategy. A comparison summary of the marketing mix strategies implemented by USCS prior to this study and after study data were gathered, analyzed and reported to USCS personnel is shown in Appendix I. In this section, I briefly discuss each of the 7Ps framework in the context of USCS.

Programs

Parents of both the target and non-target populations expressed difficulty with the school's name in so far as it raised expectations regarding the programs offered at the school. Parents perceived the school to be specifically designed for only those students who were interested in career areas commonly associated with science, technology, engineering, and math (STEM). Multiple target parents perceived the school to be designed as a school for gifted, elite

students due to its name. These parents cited messaging used by USCS to highlight the school's early college programming, wherein students are provided access to a variety of college courses as high school students, as supporting their initial perceptions of USCS as a selective, elitist institution. Messaging about the school's focus on providing students access to college courses was a pillar of the original marketing plan. While clearly selling points, these features may have delivered mixed messages to both target and non-target parents.

Place

Previous marketing materials touted the school's location on the university campus and its position as a regional school. At the time USCS opened, the university was experiencing significant enrollment decline in the wake of increasing freshman admissions standards, high personnel turnover at senior administrative positions, continual lay-offs, and highly publicized incidents of student misconduct that were poorly handled by university police officials. Clearly, these circumstances did not enhance the appeal of USCS.

Price

No other charter schools existed in the USCS recruitment area at the time of its opening, and parents expressed a lack of initial knowledge pertaining to charter schools as a school type. Individual interviews, focus group interviews, and email data converged on a common misconception that USCS was a form of private school. Initial marketing materials carried the message that USCS was a public school offering college courses at no cost to families, but parents expressed uncertainty about costs related to attendance, such as tuition at USCS itself.

As amply illustrated above, a second theme emerged relative to price: cost to the community. Newspaper headlines at the time of the school's opening placed charter school funding, and, in particular, the idea that TPS would suffer financially as a result of USCS, at the

forefront of their news coverage. Articles shared with me included headlines such as “Charter May Cost School District Dollars,” “Charter School Creates Issues,” and “Petition: Choose Charter School Opponent.” These articles contained quotes from community members and some public officials that communicated the detrimental financial effects to TPSs should families choose to enroll their children at USCS.

People

Though the physical marketing materials, school website, and social media sites maintained by USCS personnel contained no biographical or operational information about the people delivering the services and programs at the school (other than their names and occupations), during the recruitment periods of Cohort 1 and Cohort 2, individual interview, focus group, and email data indicated that the credentials of the school’s leadership and initial personnel influenced the decision of parents to apply for admission. For example, the USCS board chair was a former superintendent of schools in the region and the mayor of the city during the recruitment periods for Cohorts 1, 2, and 3, and both target and non-target families stated that the reputations of the chair and other members of the board were contributing factors to their school choice decision. The former superintendent made presentations that highlighted the potential benefits to students of attending USCS at recruiting events and information sessions at community centers across the recruitment area, and parents cited these presentations as a positive influencing factor.

Process

Marketing materials stated that students who applied to USCS would gain admission through a lottery process. Parents of the target population shared stories about conversations with peers who did not apply due to the lottery process itself. Since admission was not

guaranteed, target parents noted that other target parents would not dedicate time to complete and submit applications for their students. For example, one parent shared

yeah, they're thinking about it in a different...in another way like, "The lottery?" And then they're thinking, "Well, what if we don't get in?" Not even thinking about, if you don't then you just go to public. You just go where you've been. So you know that sometimes it's just you done so much and you just don't get around to one little thing, because so much other stuff happened during the day. Then next thing you know, the school year has started, so you're like, "Well, we'll wait till next time." I hate to say it and like that, but if you're going to target those type of people...I'm thinking where my mom lives, because my mom, she's on a fixed income so she lives in public housing, and that's where [son] goes after school most days. Like I was saying, his friends want to go but their parents just for whatever reason don't go and do it because they probably feel like, "Oh, just stay in public school. I ain't got time."

Concerns about the lottery process were not limited to target parents. All parents shared their anxiety regarding the lottery process and its potential effects on students. In the words of one parent,

And so you didn't want to get hopes up if it wasn't going to happen. But fortunately, it did. We left [son] a little bit in the dark about it. He knew a little bit that we were applying for it, but we kind of didn't tell him that the lottery was taking place until after it was over and his number had been called. Because there were classmates of his who were different learners too and really wanted it, maybe more than we did, and didn't get it the first time. And so sitting beside somebody who didn't get their number called and then you got your number called, especially when you've rode over there with them and...[long pause]...that was just tough.

Marketing materials stated that the school was a 1:1 school (one student per digital device), whereby instruction incorporated technology on a daily basis. Parents described the technology in place at the school as a positive influencer. However, parents of both target and non-target students also expressed negative experiences with the way in which the school incorporated technology into everyday instruction. Parents shared stories of how their students initially struggled to adapt to the technology-enriched learning environment and their own difficulties in assisting their students with the technologies in use.

Physical Facilities

Printed marketing materials created for the recruitment of Cohorts 1 and 2 contained no specific information about the physical facilities of the school. Messaging and visuals present in the digital materials and communications publicized during the recruitment period of Cohort 2 showcased the school's presence within the newest facility on the university campus. USCS held multiple recruiting events for Cohort 2 in the school's primary, modern facility. Since the school had not yet opened, the physical facilities were not available to visit during the recruiting period for Cohort 1. The positive influence of the physical facilities on outcome evaluation for Cohort 1 parents and the choice phase for Cohort 2 parents of both target and non-target parents was evident from case study data. In the words of one target Cohort 2 parent, "when I walked up to where y'all were and I saw those chairs, I just knew this was the right fit for her."

Somewhat disingenuously, USCS moved into one of the oldest facilities on the university campus at the beginning of its second year of operation. This new location was in need of major renovations and university administrators scheduled the building to receive a complete overhaul within two years. Storm damage caused this older facility to be unsuitable for educational use two months after the first day of school, and USCS students and staff were dispersed into temporary facilities throughout the campus for the remainder of the school year. USCS held campus-based recruiting events for Cohort 3 in three educational buildings of varying age and quality. Parents spoke at length about how the transitions from the earlier single, new building to facilities of substantially lower quality impacted their view of the school.

Promotion

A major difference in promotion strategies occurred between Cohort 1 and Cohort 2. As part of the marketing mix strategy employed by USCS when recruiting Cohort 1, board members

solicited directory information for eligible students who were enrolled at the three local public school districts in closest proximity to USCS. School board members then enlisted the assistance of an external agency to develop and mail to each of these students a printed student application for admission, a flyer with information listing dates, times and locations of recruiting events, and a letter from USCS personnel *inviting* parents to apply for admission. Due to costs associated with printing and mailing recruiting materials and high initial application volume, USCS did not employ the same mass mailing recruiting strategy for Cohort 2.

Parents of Cohort 1 interpreted the mailing in differing ways. Some parents perceived the USCS mailing as a generic communication of information about the school, but others described the mailing as an exclusive, personalized invitation for their student to attend USCS. Regardless of parents' perceptions of the USCS mailing as exclusive or generic, all Cohort 1 parents spoke about how they perceived the mass mailing tactic to be a major influencer of the enrollment demographic shift from Cohort 1 to Cohort 2. As one non-target parent stated,

I think the first lottery was probably more an example of all students, all learners of all different areas, and then the second lottery I feel like is more of children, at least in [local] County, the parents I talked to, were more-- there was no AIG program. So the way I see it there were more academically gifted children, possibly, in the second lottery who sought it out versus the first lottery of parents who-- children with special needs or children of African-American descent that it came in the mail. I asked one of [son]'s friends, who surprised me a little bit, and I asked him, "What made your mom apply?" and he said, "It came in the mail [laughter]." And so if it comes in the mail you must fill it out [laughter].

In response to the USCS directory information request, local school district officials also mailed letters to parents, encouraging them to continue enrollment within TPSs. These letters called into question the quality and viability of USCS, as illustrated by a photo of one of the letters provided to me by a parent during an (see Figure 3). Interestingly, parents who

participated in individual interviews perceived this counter-messaging as further validating USCS as a legitimate entity.

Focus group parents indicated that the recruiting materials created for Cohorts 1 and 2 were unclear, verbose, and lacking photos of local students engaged in the learning process. Target parents stated that they were unable to find the time necessary to read the information contained in the recruiting materials due to demands placed on them by their jobs, children, and other obligations. Target parents suggested that USCS personnel eliminate the term *project based learning* and *PBL* from posters and flyers in favor of *hands-on learning* due to their initial misunderstandings about it. During individual interviews, target parents expressed a need for the school to better publicize photos and videos of students instead of textual information.

Improvement Goal Attainment

In this section, I describe the outcome of applying the new marketing mix strategy in relation to the three improvement goals described in Chapter 2. Race/ethnicity, free and reduced price lunch, sex, and first generation college data are summarized in Appendix H.

Improvement Goal 1

The first improvement goal of this study was for USCS to realize a five percentage point increase in the enrollment of students who identified as Black or African American, as measured by student enrollment demographics at the 20 Day Headcount. From Cohort 2 and Cohort 3 (see Table 14), USCS achieved an increase in Black or African American student enrollment of 6 percentage points.

Though the increase did lead USCS to achieve its first improvement goal, the largest demographic change resulted from increased enrollment of students who identified as two or

Table 14

Racial/Ethnic Population Demographics as Percentage of Cohort Population

Population	W	B	O	M	H
USCS, Cohort 2	125 (80%)	17 (11%)	4 (3%)	4 (3%)	6 (4%)
USCS, Cohort 3	93 (69%)	23 (17%)	0 (0%)	13 (10%)	6 (4%)
Change, in points	-11	+6	-3	+7	0

Note. W=White, B=Black or African American, O=Other, M=Two or more races, H=Hispanic and Latino. Change reflects year over year change, in percentage points. All numbers rounded to the nearest whole number.

more races. From Cohort 2 to Cohort 3, students of the two or more races category increased by seven percentage points overall.

Improvement Goal 2

The second improvement goal of this study was for USCS to realize a five percentage point increase in students who qualified for free and reduced lunch prices according to National School Lunch guidelines, as measured by student enrollment demographics at the 20 Day Headcount. USCS achieved an increase in students who qualified for free and reduced lunch prices of 13 percentage points. These data are summarized in Table 15.

Notably, revised National School Lunch Program guidelines took effect on July 1, 2017 to increase the income threshold for qualifying families, making it more difficult for families to qualify for free and reduced prices, making Improvement Goal 2 more difficult to attain.

Improvement Goal 3

The final improvement goal of this study was for USCS to realize a five percentage point increase in students who were the first person in their immediate families to earn a college degree. First generation college data from all three cohorts, and the overall percentage at the 20-Day Headcount are shown in Table 16. First generation enrollment dipped from 51% to 34% from Cohort 1 to Cohort 2, a decrease of 17 percentage points. However, from Cohort 2 to Cohort 3, the percentage of first generation students increased by 10 percentage points to 44%. While not pertinent to Improvement Goal 3, it is nevertheless of interest to note that first generation college enrollment as a percentage of the total USCS student population was 42% at the 20-Day Headcount.

Since the USCS student population was almost evenly male and female prior to my study, I set no improvement goal related to the target criteria of sex. Interestingly, the number of

Table 15

Free and Reduced Lunch Qualifiers as a Percentage of Cohort Population

Population	Income
Cohort 2	23%
Cohort 3	36%*
Overall	33%*

Note. National School Lunch Program qualifying income increases took effect in this school year. All values rounded to the nearest whole number.

Table 16

First Generation College Students as a Percentage of Cohort Population

Population	FG
Cohort 1	51%
Cohort 2	34%
Cohort 3	44%
Overall	42%

Note. FG=First generation students. All values rounded to the nearest whole number.

females as a percentage of the total student body also increased by 7 percentage points from Cohort 2 to Cohort 3, as shown in Table 17.

In summary, then, USCS not only met each of the three improvement goals, they exceeded each goal substantially. When all target factors—race/ethnicity, Free and Reduced Lunch status, sex, first generation college status—were taken into account, 57% of Cohort 1 met two or more target criteria factors and only 40% of Cohort 2 met or exceeded this same target population threshold, a year-over-year decrease of 17 percentage points. From Cohort 2 to Cohort 3, the percentage of students who met or exceeded the target population threshold rose by 13 percentage points to 53%. The largest gains overall were realized for first generation students and those eligible for free and reduced lunch assistance. The percentages of students meeting two or more target criteria by cohort and overall are summarized in Table 18, and overall improvement goal data are summarized in Table 19.

Table 17

Female Students as a Percentage of Cohort Population

Population	Percent Female
Cohort 1	48
Cohort 2	49
Cohort 3	56
Overall	52

Notes. All values rounded to the nearest whole number.

Table 18

Students Meeting Two or More Target Criteria as a Percentage of Cohort Population

Population	Percent
Cohort 1	57
Cohort 2	40
Cohort 3	53
Overall	51

Notes. All values rounded to the nearest whole number.

Table 19

Improvement Goal Attainment

Improvement Goal	Target	Actual	Met/Unmet
Goal 1: Increase percentage of students who identify as Black or African American	+5	+6	Met
Goal 2: Increase percentage of students who qualify for free and reduced lunch prices	+5	+13	Met
Goal 3: Increase percentage of first generation college students	+5	+10	Met

Notes. Improvement goals shown as percentage points. All values rounded to the nearest whole number.

CHAPTER 5: SIGNIFICANCE AND REFLECTION

I conducted this case study to explore how and why parents chose USCS in order to inform the development of a focused marketing strategy that would be used by USCS as a tool for achieving a more demographically balanced student body—thereby also complying with its charter. The major findings of my case study, which I will expound in this chapter, are as follows:

- A focused marketing mix strategy that is informed by the local context can be a powerful tool for achieving demographic balance within schools of choice.
- Access to school transportation and capital outlay funding are vital if schools of choice are to be accessible to all students.
- Parents consider student, school, and community factors when making school choice decisions. In rural areas, the gravity of community factors can influence heavily the decision-making process.
- A school climate that is characterized by a *culture of care* can be a powerful influencer of school choice decisions, particularly in the outcome evaluation phase of the school choice process.
- The extent to which parents perceive their students as being happy and gaining confidence can heavily influence their school choice outcome evaluations, as well as their decision to continue enrollment.

In summary, I adapted the traditional five-step consumer decision-making model (Erasmus et al., 2001) and a three-step school choice decision-making model described by Bell (2009) to create a hybrid, four-stage school choice decision-making model (HSCM). The HSCM then guided my development of Level 2 (Yin, 2014) case study questions. Since it became

apparent during the course of my study that USCS parents' decision making continued after the initial choice phase, with some parents reversing their enrollment decisions in response to their initial outcome evaluations, additional exploration that extends beyond the choice phase and into the outcome evaluation phase is warranted in future studies of school choice decision making. In the case of USCS, the choice processes employed by parents aligned more closely to the HSCM than to either of the existing decision-making models (Bell, 2009; Erasmus et al., 2001). For these reasons, future studies of school choice decision making may benefit from the use of the HSCM—at least as an exploratory scaffold.

Major findings of my case study related to the influence of student, school, and community factors on parents' decision making in the context of USCS gather additional support from, and add to, the current literature. For instance, Villavicencio (2013) described how one parent's choice to maintain a child's enrollment at a low-performing school was influenced heavily by that child's positive change in demeanor after transferring from a different public school. As shown in Chapter 4, this same evaluative criterion was employed by USCS parents. The extent to which USCS parents perceived their students as being happy and gaining confidence heavily influenced their school choice outcome evaluations, as well as their decision to continue enrollment.

The strong influence of community factors on parents' school choice decision making in the context of USCS cannot be understated. Several parents were brought to tears during interviews as probing questions recalled to mind their traumatic interactions within the community, both during the decision-making process and after their students were enrolled at USCS—a public charter school. Parents shared feelings of shame and guilt for deciding to enroll at USCS versus TPS. Interactions within the community portrayed them as making selfish

decisions in favor of their families over the broader community. Several parents expressed concerns that deciding to enroll a child at the charter school could have serious, negative implications for their own livelihoods.

Though I can find no evidence of previous studies that have explored the impact of community on decision making in the context of rural charter schools, the major role rural schools in general play in shaping and sustaining rural social networks and community identity is well known (Lyson, 2002; Schafft & Jackson, 2010; Woods, 2006). Indeed, rural families who consider themselves to be *from* the rural community may equate choosing the community school with upholding their civic duty (Bagley & Hillyard, 2015). Particularly when the population of rural communities is in decline, choosing to enroll at the traditional public school within the community may be regarded as the rural citizens' civic obligation. Research suggests that rural community inhabitants may face substantial social pressures from within their social networks and the broader community to choose the community (i.e., traditional public) school (Bagley & Hillyard, 2015; Walker & Clark, 2010). All of these prior findings hold true in the case of USCS. There is a clear stigma carried by many USCS parents as a result of their decision to enroll their child/children at USCS, especially by those who consider themselves to be native to the region. For some rural parents, place may be a more potent factor than any other when selecting schools. The inescapable outcome of the social pressure that my study revealed is that strategies for attaining demographically balanced student enrollment in rural charter schools that do not take into account local community factors are likely to do little to counteract the social pressure to which parents who might prefer to enroll their child at the charter school will be subjected—especially if the family is long-established in the area.

Implications for Policymakers

Some suggest that a solution to the problem of demographic imbalances between the student populations of the nation's public charter schools and the nation's traditional public schools lies in a policy of weighted lotteries. In fact, since the U.S. Department of Education recently addressed the issue of demographically balanced enrollment in America's charter schools by communicating their concordance with weighting charter school admissions policies favoring students who are either economically disadvantaged, English Language Learners, or those with special needs, the effectiveness of weighted lotteries in achieving balanced enrollment demographics remains unclear. While states like Georgia and North Carolina have enacted new legislation to allow for weighted lotteries, many other states have yet to adopt similar policies (Baum, 2015). Even in states where weighted lotteries are now permissible, however, few schools have taken advantage of them. Regardless of the potential effect sizes of tools like weighted lotteries, policymakers, researchers, and school leaders agree that marketing and recruitment practices will remain vital to achieving balanced demographics at schools of choice (Center for Community Self-Help, A. J. Fletcher Foundation, & Public Impact, 2014; Frankenburg & Siegel-Hawley, 2009; Prothero, 2016).

If states wish to maintain balanced charter schools and schools of choice, state departments of education would be well advised to provide training and resources for new and existing charter schools in the area of marketing, recruitment, and retention. Considering that recent data suggest public charter schools in North Carolina and nationally are becoming increasingly more segregated, state leaders who are responsible for America's schools may find it a legal and moral imperative to provide these services, lest the state should fail to uphold its obligations under *Brown v. Board of Education*. As leaders consider how to assist public charter

schools with their focused marketing efforts, results from my case study of USCS indicate that the 7P's framework (Kotler & Fox, 1995) may be well suited as a scaffold for strategic planning related to marketing mix development.

A key consideration for those who develop policies intended to ensure equitable access to public charter schools for all students is the provision of access to information, school transportation, and capital funding, particularly in the context of rural charter schools. While other factors influence parents' decision making, as they did in the case of USCS, the work of several researchers has shown that a school's location with regard to proximity from the home can be a large factor in whether or not parents consider the school to be within their choice set (Bell, 2009; Hastings, Kane, & Staiger, 2005; Schneider, Schuchart, Weishaupt, & Riedel, 2012). The availability of public transportation, the parent's work schedule, and transportation costs contribute as bounding factors in the construction of school choice sets (Goyette, 2008; Hastings et al., 2005). In areas that mirror the rural context of USCS, the absence of public transportation systems capable of supporting daily student transportation to and from local charters likely poses a significant barrier to attendance for many families, particularly those that meet the target criteria established by USCS administrators. If rural charters are to survive as a viable option for all students, they must provide adequate systems of transportation that are comparable to the same systems offered by TPS.

States would be wise to enact policies that provide additional funding for transportation if rural charter school expansion is a goal. Policymakers may also consider opting for legislation that compels districts to partner with charters for the purpose of school transportation. Considering the limited public transportation systems available in many rural communities, some parents may find it too difficult to secure school transportation beyond the services provided by

the local school district, limiting their school choice options to only those provided by the district. Based on my findings, transportation is a critical factor in the attainment of demographically balanced schools.

In addition to added funding for school transportation, capital funding to support rural charter school facilities should also be at the forefront of future policy. Currently, NC public charter schools do not benefit from the same capital funding streams made available to other public schools. This funding disparity is a major barrier to enrollment for USCS personnel. Though the quality of school facilities surfaced as a negative influencer for USCS parents, school officials cited the lack of capital funding as severely hampering their ability to act on this issue (personal interview). As in other rural areas, very few facilities capable of being renovated to meet educational building code requirements exist in the USCS area. Due to small population sizes and low economies of scale, rural charter schools like USCS are forced to weigh school transportation and subsidized lunch programs—each critical if the schools are to reach the neediest students—against capital needs, which further exacerbates the issue of balanced enrollment.

Equally critical to transportation availability and capital funding is the imperative to implement policies and practices that foster equitable access to information about public school options for all parents. My case study of USCS shows clear disparities related to access to information between target and non-target parents. As shown in Chapter 4, target parents were less likely than non-target parents to encounter information about USCS within their own social and professional networks, and they were also less likely to attend USCS recruiting events and school activities due to lower resource availability and more constraining family and work obligations than their non-target peers. Other studies of school choice have reached similar

conclusions. Previous studies have shown that parents' choice sets are influenced by their access to social capital, social and professional networks, and their ability to interpret information provided by schools (Bancroft, 2009; Bell, 2009; Hastings, Van Weelden, & Weinstein, 2007; Olson, Beal, & Hendry, 2012). More specifically, parents do not have equal or equitable access to the same networks, information, and resources, and these disparities have been shown to occur along race and socioeconomic class lines (André-Bechely, 2005; Bancroft, 2009; Bell, 2009; Goyette, 2008; Hastings et al., 2007; Henig, 1995).

To level the playing field for students of all backgrounds, policymakers should consider legislation that requires public school employees to allow the dissemination of information about all public school options to all public school students. Under such policies, charters would send communications about TPS to charter parents, TPS would send charter information to TPS parents, and schools would allow schools of all types to participate in school fairs and events so that all parents can make informed school choice decisions.

Implications for Educator Preparation Programs

As the charter school movement continues to grow, it will be increasingly important for all public schools, not just for public charter schools, to build internal capacity for marketing, recruitment, and retention. It bears consideration that at least some of the burden for developing this capacity will fall to post-secondary educator preparation programs. It is imperative that institutions of higher education acknowledge that charter schools are now firmly placed within the contemporary educational landscape, and educational offerings at these higher education institutions must be re-tooled to prepare graduates—some of whom will work and lead charter schools—with a knowledge and skill set to do so. As charters grow, marketing must travel from the fringes to the forefront of the role of school and district leader, across all school types. This is

a new and important skill for a new educational marketplace, and a vital one for all school and district administrators.

Educator preparation programs also should intensify their efforts to foster graduates' acquisition of strong relationship-building skills. My research shows that, overwhelmingly, the school choice decisions and outcome evaluations of parents were highly influenced by the degree to which they felt that school personnel demonstrated a genuine care for, and commitment to, their students. Parents offered as evidence of care for their students' specific instances wherein school personnel provided personalized support to their students, as well as expressing genuine concern for the needs of the family. This suggests that today's teachers must be able to identify and tailor instructional practices to the needs of individual students if they are to cultivate strong bonds between the school and the home. The same need extends to communication skills, as educators must be able to draw on a variety of tools and strategies to engage parents through positive, authentic, and meaningful conversations that center on a shared care for and commitment to the student.

Implications for TPS

Schools and districts that attempt to out-compete public charter schools by focusing on curricular and extracurricular programmatic offerings instead of strengthening a positive and caring school culture may find themselves falling further and further behind in the contemporary educational marketplace. As my case study of USCS suggests, all schools would be well advised to institute programs that foster strong relationships between students and personnel. This finding may be especially important for rural schools, where, as discussed in great detail above, community bonds can be very powerful school choice influencers.

Though the academic and political rhetoric often centers on, or otherwise elevates, the concept of competition between charter and traditional public schools, all proponents of the public school—in all of its contemporary forms—should acknowledge that at least some segment of parents—such as the continual searchers described in my case study—is likely to pursue options beyond the traditional public school. Given that charter schools now have cemented themselves as a public option, an increasingly growing segment of parents—much like the alternative pre-disposers in the context of USCS—is also likely to choose only non-traditional public schools for their children, thereby raising students who know only charters as *their* public schools. Adding to these two segments, there is another contingent of parents, however small, who may find themselves dissatisfied with traditional public school options. Hence, it is clear that a population of charter school students is likely to exist for some time to come, regardless of any real or potential competitive efforts of traditional public schools.

In consideration of these dynamics, modern school district leaders would be wise to think carefully about how they approach interactions with, and their responses to, charter school stakeholders. The experiences communicated by USCS parents present a compelling case for school and district leaders to maintain a positive, or at least neutral, stance toward public charters, when communicating to both their internal and external publics. A clear instance of a negative outcome of projecting a derogatory portrayal of charter schools was provided by USCS parents who previously considered themselves to be ardent, lifelong advocates for traditional public schools but felt ostracized and alienated by the actions and rhetoric of traditional public school leaders. The negative experiences of such former ardent supporters are likely to prevent these families from ever returning to the traditional public schools. By taking a combative stance and denigrating the role of USCS, some traditional public school district officials effectively

converted potential resources (USCS parents and their networks) that could have been used to strengthen traditional public schools into forthright, acerbic critics.

Instead of perpetuating an “us versus them” mentality, I posit that all public school proponents—whether traditional public school or public charter schools—would be wise to think strategically about conditions that foster excellent educational opportunities for all public school students. In fact, it may behoove TPS officials to actively pursue district-charter partnerships to keep local charter schools afloat. The persistent “threat” of competition in the form of public charter schools can be an extremely powerful stimulus for school and district transformation, as it was in the case of USCS. Though I did not expressly intend to explore the impact of USCS on TPS within the USCS recruitment area, my case study revealed that the presence of USCS is likely to have been a strong motivator for change within the TPS districts. As described in Chapter 4, parents shared multiple retention strategies employed by TPS in response to the opening of USCS. For example, parents talked about how local school districts made leadership changes, hired new support personnel, and added new curricula in order to retain students. The timing of these developments was particularly ironic for USCS parents, as several mentioned that they had been advocating for these same changes for many years to no avail.

Implications for USCS

From my own perspective, I have renewed confidence in the future of USCS. By adhering to the focused marketing plan development and continuous improvement process that is now firmly in place (see Figure 4), USCS will be well-positioned to attract consistently and retain a student body whose demographics closely mirror those of the USCS region.

My study uncovered a wide variety of contextual factors, especially context-specific or people-defining community factors that influenced parents’ decision making. To recruit their

Focused Marketing for Educational Institutions: A Quick Reference

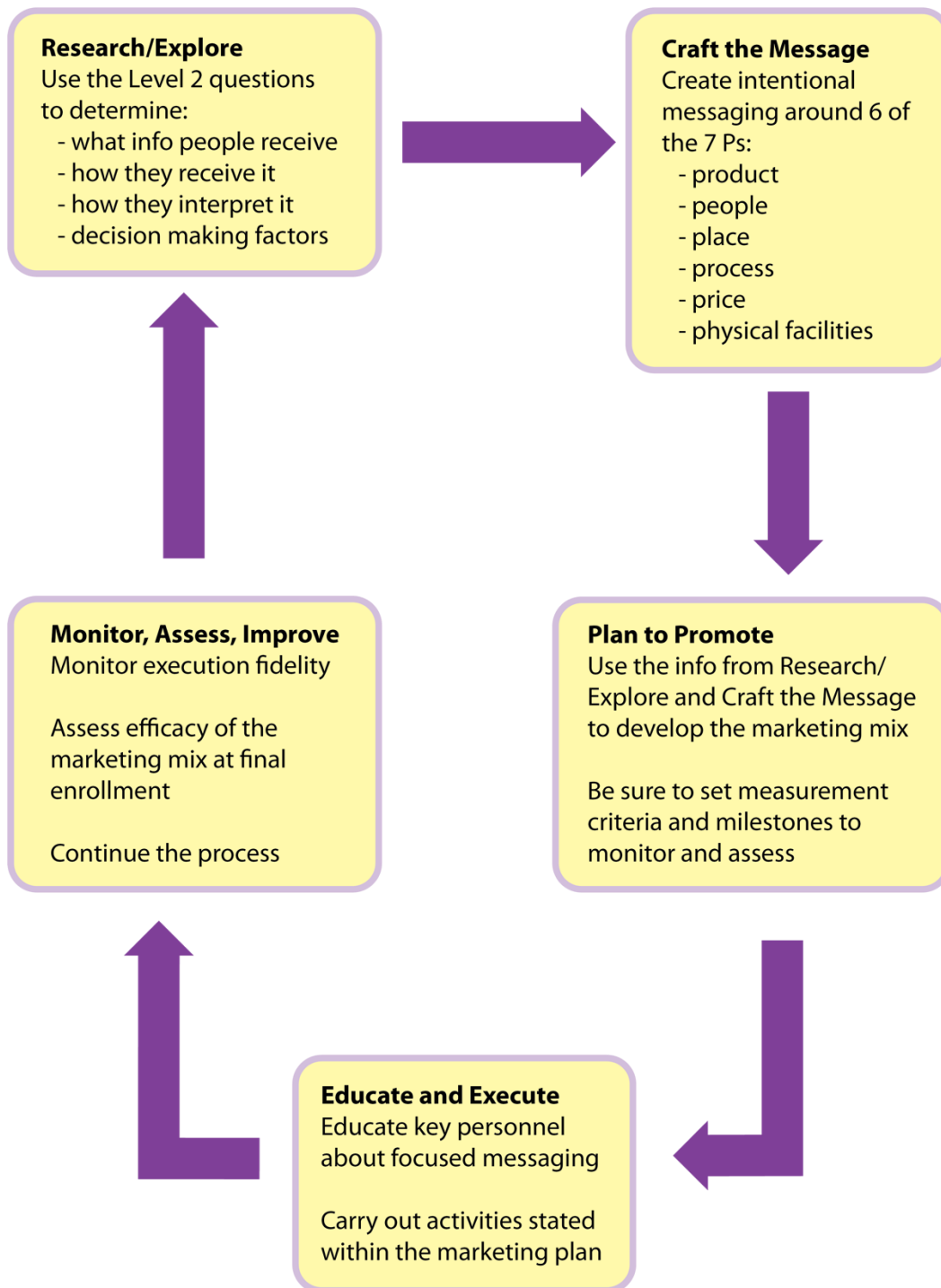


Figure 4. Overview of the marketing mix strategy development process.

target population more effectively, school personnel must continue to learn from parents by engaging them in discussions around the critical questions shown in Figure 5. Specifically, USCS must continuously explore how parents receive information, how they interact with it, and how they interpret it. This is a most important and critical step in developing a focused marketing strategy. As my study shows, a plan that is informed by the “consumer” can be a very powerful one. USCS personnel must continually refine their messaging and promotional strategies, with the considerations shown in Figure 5 in mind, to successfully recruit their target population.

As new and additional members of staff participate directly in carrying out the marketing and recruiting plan, it will become ever more important that each staff member clearly understands his/her role with respect to marketing, recruitment, and retention. Since effective marketing practices are, and have been, largely absent from teacher preparation curricula, USCS will need to devote time and attention to building internal awareness and capacity in this area.

At the same time, there is still much work to be done across several critical areas if USCS is to continue to attract large numbers of applicants. In the area of physical facilities, school personnel must immediately pursue major capital improvements, including the purchase of new furniture and facilities. Transportation continues to be a major factor for target families, and it is imperative that school leaders leverage community resources to make transportation more accessible to a broader variety of students. As the school continues to grow, it will be important for personnel to sustain the culture of care, innovation, and high expectations that is so highly valued by USCS stakeholders. School leaders should offer professional development that is designed to bring to light what passion, care, commitment, and teamwork look like in practice, as well as strategies to continually develop internal capacity in those areas. Systems that foster

Focused Marketing for Educational Institutions:
Asking the Right Questions

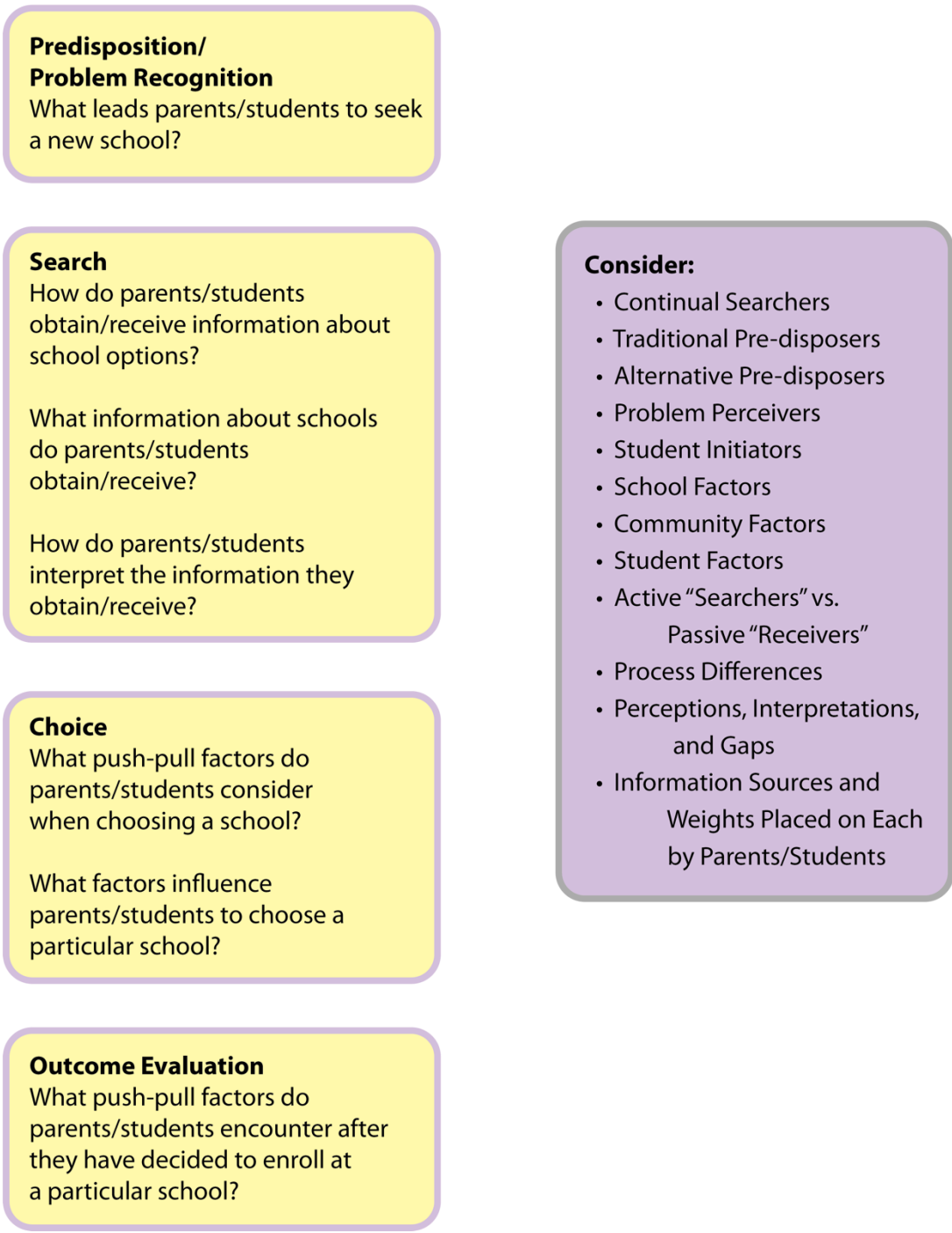


Figure 5. Guiding questions aligned to the HSCM.

relationship building between faculty and students, such as advisory programs and extracurricular activities, will be vital to the school's long-term success.

Notwithstanding these issues, the future is very bright for USCS. It is clear that the USCS educators are highly committed to sustaining a school to which all types of students have equitable access, and they now have a framework to continuously improve their marketing efforts. I expect them to achieve excellent results for some time to come.

Looking to the Future

Though TSD transformation was not the focus of my study, there is great potential to explore the full impacts of USCS on TSD, particularly the extent to which USCS may have catalyzed or otherwise accelerated educational transformations within and among the relevant public school districts and even private schools in the area. Although an original precept of the charter ideal was to spur innovation, my study shows that charter schools may have a powerful effect less through incubating educational innovation and more in catalyzing immediate and positive change across the educational marketplace. In this same vein, school district leaders would be wise to consider ways in which they may be able to leverage existing charters, or charter-like schools of their own, to accelerate educational transformation, innovation, and continuous improvement within their own districts.

Another facet of my study that warrants further exploration is the hybrid school choice decision making model (HSCM) (see Table 7). The HSCM I developed in the course of my project offers a vast improvement over previous school decision-making models, in that it captures the critical time period just after the initial choice to enroll. The HSCM may serve both as an excellent framework for exploratory studies of school choice, and as an actionable scaffold for the development of a focused and effective marketing mix strategy. The focused marketing

plan development process shown in Figure 4, when combined with questions tailored to specific phases of the HSCM, may be a useful and effective for school officials who are responsible for recruitment across a variety of school types.

Beyond the USCS Local Environment

As a result of my work, I intend to assist other schools and districts with the development of their own focused recruiting plans. A major driver of my study was the dearth of information and assistance for developing focused marketing and recruiting plans in the context of K-12 schools, and the absence of such resources represents a significant problem for practitioners who are tasked with achieving a balanced student body. The exceptional results USCS achieved in such a short time period provide evidence that a carefully designed marketing and recruiting plan can have a large impact on the composition of schools of choice. The quick reference sheets shown in Figure 4 and Figure 5 provide an overview of this process, and it is my goal to partner with other researcher-practitioners to craft additional resources, such as workshops, planning materials, and research guides, to magnify the impact of this most important work so that greater numbers of students have equitable access to all public school options. Combined with other measures aimed at educational equity, such as weighted lotteries and free school transportation, the implementation of more focused and informed marketing practices across public charter schools holds great promise for bringing the demographics of all public schools into greater balance.

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APPENDIX A: INSTITUTIONAL REVIEW BOARD APPROVAL



EAST CAROLINA UNIVERSITY
University & Medical Center Institutional Review Board Office
4N-70 Brody Medical Sciences Building · Mail Stop 682
600 Moye Boulevard · Greenville, NC 27834
Office **252-744-2914** · Fax **252-744-2284** · www.ecu.edu/irb

Notification of Initial Approval: Expedited

From: Social/Behavioral IRB
To: [Andrew Harris](#)
CC: [Robert Reardon](#)
Date: 1/12/2017
Re: [UMCIRB_16-002074](#)
Parents' Preference for Rural Charter Schools

I am pleased to inform you that your Expedited Application was approved. Approval of the study and any consent form(s) is for the period of 1/12/2017 to 1/11/2018. The research study is eligible for review under expedited category #6, 7. The Chairperson (or designee) deemed this study no more than minimal risk.

Changes to this approved research may not be initiated without UMCIRB review except when necessary to eliminate an apparent immediate hazard to the participant. All unanticipated problems involving risks to participants and others must be promptly reported to the UMCIRB. The investigator must submit a continuing review/closure application to the UMCIRB prior to the date of study expiration. The Investigator must adhere to all reporting requirements for this study.

Approved consent documents with the IRB approval date stamped on the document should be used to consent participants (consent documents with the IRB approval date stamp are found under the Documents tab in the study workspace).

The approval includes the following items:

Name	Description
Dissertation Proposal	Study Protocol or Grant Application
Focus Group Consent - Version 2	Consent Forms
Individual Interview Consent-Version 2	Consent Forms
Interview Questions	Interview/Focus Group Scripts/Questions
NEAAT Board of Directors Study Approval Letter	Additional Items

The Chairperson (or designee) does not have a potential for conflict of interest on this study.

APPENDIX B: LETTER TO THE BOARD OF DIRECTORS

DATE

USCS Board Chair
USCS Address
USCS City, State, Zip

Dear XXXXX,

At the USCS Board of Directors Retreat in June 2016, you requested that I research and develop a marketing and recruitment plan aimed at achieving a more demographically balanced enrollment at USCS. Per your request, and after receiving approval from the East Carolina University Institutional Review Board, I will begin this important work at USCS this month.

To study this issue in depth, I will obtain data to answer the following research questions:

- How do parents choose USCS?
- Do the choice processes differ between parents of target and non-target populations?
- How has the current marketing mix strategy implemented by USCS shaped its applicant pool?

I intend to collect data in response to these questions by:

- Conducting individual interviews of USCS parents at USCS, by phone, and virtually (if requested by parents);
- Conducting focus group interviews of USCS parents at USCS;
- Obtaining public documents including, but not limited to, emails, newsletters, letters to parents, and marketing materials;
- Recording my own experiences and participant-observations at USCS.

I anticipate this study to require at least 10 months to complete. At the conclusion of the study, I will provide to you a summary of my findings and a set of recommendations to inform the development of future marketing and recruitment strategy at USCS. As the study comes to a close, I will contact you to schedule a time to present this report and answer any questions you may have related to it.

Should you have questions at any time during the course of the study, please do not hesitate to contact me. I look forward to working with you to explore this issue.

Sincerely,

Andrew Harris, Doctoral Candidate
East Carolina University

APPENDIX C: REQUEST TO PARTICIPATE LETTER

Dear Participant,

I am a student at East Carolina University in the Department of Educational Leadership. I am asking you to take part in my research study entitled, "Toward a balanced demographic: A case study of parents' preference for rural charter schools".

The purpose of this research is to gain a better understanding of how and why parents choose to enroll their students at [USCS]. [Note: This acronym will be replaced by the name of the real school in the actual letter.] By doing this research, I hope to learn how parents choose USCS and how the USCS marketing strategy has shaped its current student population. The results of this study will be used to inform future recruitment planning.

Your participation is completely voluntary. Your decision to participate or not to participate, any and all responses you provide, and any and all communication regarding this study will have no effect on your child's enrollment at USCS, including his/her grades, course and grade placement(s), and eligibility for school events and activities.

You are being invited to take part in this research by participating in an individual or focus group interview. You have been selected for an interview because you are a parent or guardian of a student enrolled at USCS. The amount of time it will take you to complete the interview may range from 30-60 minutes.

If you agree to take part in an interview, you will be asked questions that relate to how you found out about USCS and why you chose to enroll your child.

This research is overseen by the ECU Institutional Review Board. Therefore, some of the IRB members or the IRB staff may need to review my research data. However, the information you provide will not be linked to you. Therefore, your responses cannot be traced back to you by anyone other than the interviewer and, if you participate in a focus group, other focus group participants.

If you have questions about your rights when taking part in this research, call the Office of Research Integrity & Compliance (ORIC) at phone number 252-744-2914 (days, 8:00am-5:00pm). If you would like to report a complaint or concern about this research study, call the Director of ORIC, at 252-744-1971.

You do not have to take part in this research, and you can stop at any time. If you decide you are willing to take part in this study, please call the school at (555) 555-5555 or email me at XX@USCS.edu to schedule an interview. Thank you for taking the time to participate in my research.

Sincerely,
Andrew Harris, Principal Investigator
East Carolina University

APPENDIX D: PARTICIPANT ACKNOWLEDGEMENT AND CONSENT FORM

Background

I am currently conducting a study to seek a better understanding of how and why parents choose to enroll their students at USCS. To explore this topic, I will interview parents of enrolled students to obtain data relevant to the topic. The results of the study will be used to inform future recruitment planning.

Participation in Individual or Focus Group Interviews

You have been asked to participate in an individual or focus group interview. Should you agree to participate, please note that your responses will be recorded and transcribed by the interviewer. Your name and identifying information will not be made available to anyone other than the interviewer, and your responses and behavior during the interview will have no effect on your student's enrollment or standing at USCS. You do not have to take part in this research, and you may stop at any time.

Acknowledgement and Consent

I confirm that I have read and understand the statements above and have been provided an opportunity to ask questions.

Furthermore, I understand:

- My participation in this interview is voluntary and that I may withdraw from it at any time and for any reason;
- I am not entitled to, nor will I receive, any compensation for my participation;
- My responses will be recorded, transcribed, and analyzed by the interviewer;
- My name and identifying information will not be included in any publications resulting from this study; and,
- My decision to participate or not to participate, any and all responses I provide to the interviewer, and any and all communication regarding this study will have no effect on my child's enrollment at USCS, including his/her grades, course and grade placement(s), and eligibility for school events and activities.

I agree to participate in the study mentioned above.

Participant Signature

Date

Researcher Signature

Date

APPENDIX E: SEMI-STRUCTURED INTERVIEW QUESTIONS

Introduction read by interviewer:

Thank you for agreeing to speak with me today. In talking with you, I hope to learn more about how and why you chose to enroll your child at USCS. While our conversation is being recorded, please know that the audio recording will be used for my analysis alone and will not be shared with, or released to, anyone for any reason. I encourage you to be open, honest, and candid.

I truly look forward to learning from you, and I greatly appreciate your time.

Interview questions:

So, tell me about your journey to USCS. How did you first find out about the school, and what did you do afterward?

Why did you choose to enroll your student at the school? How did you make your decision?

Were there things that made you consider not enrolling your child at USCS?

At conclusion of interview, read:

Thank you for speaking with me today. This experience has been very helpful, and I've really enjoyed our conversation. I may be in touch over the next week to ask a follow-up question or two to dig just a bit deeper into some of your responses. Again, thank you for sharing.

APPENDIX F: SEMI-STRUCTURED FOCUS GROUP QUESTIONS

Introduction read by interviewer:

Thank you for participating as a part of this focus group. The goal of today's meeting is to learn more about how and why you chose to enroll your child at USCS. While our conversation is being videotaped, please know that the video footage is for my analysis alone and will not be shared with, or released to, anyone for any reason. I encourage you to be open, honest, and candid.

Hopefully, this experience will be more of a conversation and less of a question and answer session. As I ask each question, my intent is to pose the question to the group as a whole. Please feel free to add to what others are saying, confirm what they are saying by sharing your own experience. If your experiences or perceptions were different, I encourage you to share how they differed.

I truly look forward to learning from you, and I greatly appreciate your time. Now, for the first question.

Interview questions:

How did you first hear about the school?

What did you do after you heard about the school?

What made you want to find out more about USCS?

What items do you remember seeing before you enrolled your student? For instance, did you see flyers, brochures, posters, websites, etc.?

When you saw those items, what was your impression of them?

Which items were most helpful? What was most helpful about them?

Which items were least helpful? Why do you feel that way?

Based on those items, what did you know about the school? What was your perception of USCS?

Based on those items, what questions did you have?

Did you attend any of the school's recruiting events? What was your experience like at the/those event(s)?

Did you speak with anyone before enrolling your child? If so, who did you speak with and what was your experience like?

What were the most important factors to you in making your decision to enroll your child?

At any time, did you consider not enrolling your child? If so, why?

Why should a parent enroll their child at USCS?

What do you feel is special about USCS?

What type of student is best suited for USCS?

What is it like to be a USCS parent?

Is there anything else you wish to share?

Instructions to interviewer:

When all participants have finished sharing, state: *Thank you for all you've shared today. This experience has been very helpful, and I've really enjoyed our conversation. I may be in touch over the next week to ask a follow-up question or two to dig just a bit deeper into some of your responses. Again, thank you for participating in the discussion.*

APPENDIX G: MASTER LIST OF CODES WITH DESCRIPTIONS

Coding Categories, Properties, and Descriptions, Predisposition/Problem Recognition Phase

Category	Properties/Dimensions	Description
Explored Options Previously		The family has/has not explored alternatives to traditional public schools. Families who have enrolled a child/children in homeschools, private schools, and other school types are included as "has explored" due to familiarity and experience with school choice.
Initiator	Other	Person that initiated the choice process. Person who initially informed the parent about the school or suggested that the school would be a suitable option for the parent was not a parent or student. Examples include a student's teachers or close family members.
	Parent	Parent initiated the search process.
	Student	Student initiated the search process.
No Access to Information		The parent mentions that he/she or other community members did not have access to information about the school.
Satisfaction with TPS	Dissatisfied	Level of satisfaction with traditional public school options. Parent was not satisfied with traditional public school option.
	Mostly Satisfied	Parent was mostly satisfied with traditional public school option.
Specific Student Need	Fit	Parent has an ongoing awareness that his/her student has one or more individualized, special needs. Student does not "fit in" or may or may not "fit" at the charter school.
	High student previous performance in STEM areas	Student excels in STEM courses and/or activities.

Predisposition/Problem Recognition Phase, cont.

Category	Properties/Dimensions	Description
Specific Student Need	Introvert	Student is described as an "introvert", "quiet", "hard time making friends".
	Love of learning	Student demonstrates a "love of learning".
	Personalized	Student needs a "personalized" learning environment.

Coding Categories, Properties, and Descriptions, Search Phase

Category	Properties/Dimensions	Description
Interpretations	College prep	Parent interpreted the school's programming as providing access to and preparation for college.
	Exclusivity and admissions requirements	Parent perceived the school to have academic admission requirements, behavioral admission requirements, and/or a stringent process for selection. Parent perceived the school to be an elite school for honors level students.
	Hands-on versus PBL	Parent interpreted the school's instructional approach as "hands-on".
	Interdisciplinary STEM versus traditional STEM	Parent discussed ways in which course content was blended, such that all courses addressed content from other content areas.
	Public versus private	Parent perceived the school to be, or questioned that if it was, a free public school.
	Real world versus authentic	Parent described the instructional methods and/or course content as "real world".
	School's name as elite	Parent mentioned that the school name led him/her or other community members to perceive the school as being only for advanced/elite students.
	Too much info	Parent described information he/she obtained as being "too much", "too wordy", too complex to comprehend, or unclear.

Search Phase, cont.

Category	Properties/Dimensions	Description
Interpretations	What are charters	Parent mentioned a lack of knowledge pertaining to what a charter school is.
	What are STEM schools	Parent mentioned a lack of knowledge about what a STEM school is.
Methods and Actions	Active	Specific actions parents took to acquire information.
	Access to technology for parent	Parent referenced using technology to as a search tool.
	Attended recruiting events	Parent attended one or more recruiting events to acquire information about the school.
	Conducted online research	Parent conducted their own online research to acquire information about the school.
	Researched other schools	Parent actively sought information about some aspect of the school by investigating the websites of other schools with similar characteristics.
	Viewed school website	Parent researched information about the school by visiting the school's website.
	Web search	Parent sought information about the school using web resources other than the school website and the websites of other schools.
	Researching	Parent mentioned "researching" as a means of finding more information about the school.
	Solicited information from social network	Parent actively initiated dialogue within his/her social network to acquire more information about the school.
	Passive	Ways by which parents acquired information or awareness of the school without taking direct action to acquire it.
Bus as advertisement	Parent was made aware of the school by seeing a bus.	
Network - community	Parent received information about the school through day-to-day interactions within the community.	

Search Phase, cont.

Category	Properties/Dimensions	Description
Methods and Actions	Lack of community knowledge	
	Network - job	Parent received information about the school through day-to-day interactions while at work.
	Read newspaper	Parent acquired information about the school through newspaper coverage. Not as a research strategy.
	Received mail	Parent received mail sent specifically to him/her by the school.
	Saw road sign	Parent was made aware of the school by seeing a road sign.
	Social media	Parent acquired information about the school through passive use of social media versus a searching social media for the specific purpose of acquiring information about available school options.
	Social network	Parent received information about the school through day-to-day interactions within his/her social network.
	Lack of information in network	Parent specifically mentions a lack of information in their social network.
Types of Information	Dialogue and experiential	Information obtained by "word-of-mouth" and experiences with school personnel, staff, and students, such as Parent Nights and community events.
	Social media	Digital social media sources, such as Facebook or Instagram.
	Website	The school's website.
	Brochures	Parent obtained one of the school's brochures.
	Letter	Parent received a letter from the school.
	Newspaper	Parent read an article about the school in the newspaper.

Coding Categories, Properties, and Descriptions, Choice Phase

Category	Properties/Dimensions	Description
Community Factors	Negative	Community factors perceived to reflect the school choice option negatively.
	Community dissent	Parent mentions community sentiment against the charter school.
	Defensive	Parent mentions the need to defend the charter school in the community.
	Negative comments	Negative comments about the school made by community members.
	Outcast feeling	Parent mentions the potential to be outcast by community members as a result of considering the charter school as a school choice option.
	Shame	Parent mentions feel ashamed of considering the charter school as a school choice option or of being shamed by community members.
	Positive	Community factors perceived to reflect the school choice option positively.
School Factors	Admissions process	Parent mentions the process of admission as a factor in the school choice process. May include being "accepted", likeliness of being offered admission.
	Challenge	Parent mentions "challenge" related to his/her student.
	Connection to careers	Parent mentions a focus on career/professional skills, "life skills", or career-specific experiences, such as internships.
	Cost	Parent considered potential costs related to enrollment.
	Curriculum	
	College access	Students have access to college courses.
	STEM	Parent specifically mentions "STEM" courses as a factor.
Existing demographics	Parent mentions some demographic aspect of the student population, or the student population he/she perceives as attending (or that will attend) the school.	

Choice Phase, cont.

Category	Properties/Dimensions	Description
School Factors	Extracurricular programs	Parents mentions presence or lack of extracurricular programs and activities, such as athletics and band, as a factor.
	Facilities	The physical facilities within which the school is housed.
	Instructional methods	The specific teaching methods perceived to be commonplace at the school.
	Different teaching methods	Parent mentions "different" teaching methods.
	Hands-on	Parent describes teaching methods as "hands-on".
	PBL	Parent mentions "projects", "PBL", or "project based learning".
	Presentations	Instructional methods that require students to present information and/or develop presentation skills.
	Public speaking	Instructional methods that require students to speak to the public or to develop public speaking skills.
	Real world	Parents mention the instructional approach as "real world".
	Length of existence	How long the school has been in operation and/or the likelihood that it will remain in operation. Parents mention that the school is new and "unproven".
	Location	Geographic location of the school.
	College campus	The school is located on a college campus.
	Proximity to home	The school's geographic location in relation to the parent's residence.
	Opportunity/Exposure	Parent describes the school choice as an "opportunity" or as providing students with "opportunities". The school "exposes" students, raising their awareness of cultures, careers, or college.
Personnel	The personnel employed by the school or involved with its governance.	
Excellent leadership reputation	Parent mentions the school's leadership as being a motivating factor.	
Uncertified/certified teachers	Parent mentions the certifications, prior performance, or academic background and/or credentials of the school's teachers.	

Choice Phase, cont.

Category	Properties/Dimensions	Description
	Prepared for college	Parent perceives that the school will prepare the student for college.
	Resources	The physical assets of the school, such as laptops or lab equipment. Parent refers to the school's "technology".
School Factors	School culture and environment	
	Caring staff	The extent to which school personnel care for his/her student, as perceived by the parent.
	Family	The parent perceives the school to be "like a family".
	Interactions across grade levels	School implements systems/structures to facilitate interactions across grade levels.
	Safe environment	Whether the environment is perceived to be "safe" or not.
	Small class sizes	Parent refers to small class sizes.
	Vision	The vision, mission, beliefs, and/or philosophy of the school.
	School performance grade	The School Performance Grade or historical performance data, such as standardized test scores, students earned while enrolled at the school.
	School's name	The parent's perception of the school based on the school's literal name.
	Transportation	Transportation service to and from the school.
Student Factors		Factors directly related to the student or students.
	Desire to attend	The parent's perception of whether or not the student desires to attend the school.
	Fear/Exclusivity	A fear that the student will not succeed academically due to the student's previous mediocre or poor academic performance. Fear that the student is not "good enough".
	Independence	Parent perceives that the student will become more independent as a result of having attended the school.
	Leaving friends	The student will "leave friends" or may struggle to make friends.

Choice Phase, cont.

Category	Properties/Dimensions	Description
Comfort with Change	Love of learning	The child has a natural "love of learning".
	Unhappy at current school	Parent perception that the student is unhappy at his/her current school.
	Way out	Parent perceives the school to be "a way out" for the student, or a "fresh start".
		Parent mentions his/her comfort with change as a factor in the school choice decision-making process.
	Fear of change	Parent mentions a "fear of change".
Decision Maker	Sacrifice	Parent mentions the need to "sacrifice".
		The chief school choice decision maker in the student's family.
	Parent decision	The parent made the school choice decision without consideration of the student's preferred school option, or in spite of the student's choice.
	Student decision	The parent highly regarded the student's choice of schools and considered it as the most important factor in the school choice process. The school choice decision was essentially the student's choice to make.

Coding Categories, Properties, and Descriptions, Outcome Evaluation Phase

Category	Properties/Dimensions	Description
Community Factors		[See community factors descriptions in choice phase.]
School Factors	Closeness across grade levels	Parent mentions an appreciation for student interactions and relationships across grade levels specifically due to the school's focus on structures that encourage blended grades and whole school opportunities for collaboration.
	Student driven	Parent evaluates the school as a good or bad choice by the extent to which activities, programming, and decision making is perceived to be driven by a care for students and/or the students themselves.

Outcome Evaluation Phase, cont.

Category	Properties/Dimensions	Description
Student factors	Teacher communication and care	The frequency of, content within, and care demonstrated by teacher communications with the parent, such as emails and phone calls.
	Work in groups	Students work in groups to learn.
		Factors directly related to the student or students.
	Growth	The parent perceives the student(s) to have "grown".
	Overwhelmed	The parent perceives the student(s) to be, or have been, "overwhelmed".
	Struggle	The parent perceives the student to have "struggled".
	Engaged	Parent perceives the student(s) to be engaged in their learning and/or as a contributing member of the school.
	Happy	The parent perceives the student to be "happy", "unhappy", and/or to have a higher or lower self-esteem/confidence.

APPENDIX H: COMPARATIVE DEMOGRAPHICS BY COHORT

Comparative Demographics by Cohort and Total Student Population

Population	W	B	O	M	H	FG	FRL	FEM	T
Cohort 1	81 (66%)	29 (24%)	3 (2%)	7 (6%)	3 (2%)	63 (51%)	54 (44%)	59 (48%)	70 (57%)
Cohort 2	125 (80%)	17 (11%)	4 (3%)	4 (3%)	6 (4%)	53 (34%)	36 (23%)	76 (49%)	63 (40%)
Cohort 3	93 (69%)	23 (17%)	0 (0%)	13 (10%)	6 (4%)	60 (44%)	48 (36%)	76 (56%)	72 (53%)
Overall, Post- Study	251 (71%)	60 (17%)	5 (1%)	22 (6%)	14 (4%)	148 (42%)	117 (33%)	183 (52%)	178 (51%)

Notes. W=White, B=Black or African-American, O=Other, M=Two or more races, H=Hispanic and Latino, F=First generation college student, FRL=Free or reduced lunch, FEM=Female, T=Students meeting two or more target criteria. All values rounded to the nearest whole number. National School Lunch Program qualifying income increases took effect at the beginning of the Cohort 3 school year.

APPENDIX I: COMPARISON OF USCS MARKETING MIX STRATEGIES

<u>“P”</u>	<u>Previous</u>	<u>New</u>
Programs	Science, technology, engineering, math (STEM) Aerospace and Technology at the center Early College High School Full school name often used	Strategies that engage minds (STEM) Competitive academic teams and clubs Tutoring and mentoring National curricula and programs Pilot’s certification and early advancement Collaborations with professors and community organizations Intentional use of abbreviated school name
Place	College campus Regional school	College campus Field trip locations Remote Learning Days Service learning and internship locations Regional school Small setting Family, caring environment
Price	Public charter school College at no cost	Free, public STEM school Free college Value to community External funding brought to community Free transportation service
People	Little focus on people delivering the programs or services	Passionate, accomplished educators Happy, confident students Caring volunteers Cross-career professionals University collaborators State and national contributors

Process	<ul style="list-style-type: none"> Project Based Learning (PBL) Interdisciplinary Units of Instruction 1:1 Open lottery 	<ul style="list-style-type: none"> Innovative, hands-on instruction Testimonials from parents who didn't think their children would gain admission Open to all Small group instruction Student voice and choice Teaming Career skills Personalized instruction College courses Different (contrast to traditional) Free transportation service
Physical Facilities	<ul style="list-style-type: none"> University campus Laptops for students Classroom technology 	<ul style="list-style-type: none"> Access to university resources University STEM lab Robotics lab Aviation lab with flight simulators and air traffic control room Stadium seating lecture halls Laptops for students Classroom technology University cafeteria New buses
Promotion	<ul style="list-style-type: none"> Information nights Mass mailings (Cohort 1) Road signs Brochures and rack cards Newspaper ads Website and Facebook Placements at grocery stores and businesses 	<ul style="list-style-type: none"> Photos and videos of students in action across outlets and materials Intensive focus on social media and website Diversity apparent within publications Website, Facebook, Instagram, Snapchat, twitter Placements in fast food restaurants, convenience stores, churches Format of school events placed students and parents at the forefront Events were held in more campus facilities and locations Mass mailings Held community events closer to target population centers Held events that allowed for non-student participation Simplified communications Created Spanish publications Streamlined enrollment process and intensified focus on transition programs (enrollment considered part of marketing)

APPENDIX J: USCS MARKETING MATERIALS

Innovative Instruction in Project-Based Learning

Students learn best when they are challenged by creative approaches to learning and staff perform best when they develop varied methods to engage students. Through project-based learning, students master content and skills needed for the future world of work.

Opportunities for College Credit at [REDACTED] and [REDACTED]

Students have opportunities to earn high school credit in middle school and college credit in high school through partnerships with [REDACTED] University and College [REDACTED].



Cooperative Learning to Build Employability Skills

Teaming is a critical skill to develop for all students to be successful in life. Students learn best when they can support and are supported by others. At [REDACTED] students work in teams to gain and practice employability skills.

Partnerships with Parents and Families

Families are the most important influence on motivation for learning. [REDACTED] works to engage parents as partners.

Contact Information



is a highly innovative, free public STEM school open to all NC students where passionate, accomplished educators offer hands-on instruction in a family-like environment.



Offers a World Class STEM Education for ALL

STEM fields are careers in Science, Technology, Engineering, and Math.

Students learn content and develop skills that prepare them for high-paying STEM jobs.



Personalized Learning with Passionate Educators

Coaches are passionate about helping students learn. Coaches believe all students can learn, but not within the same timeframe or by using one size fits all instruction. Learning environments and pedagogy focus on meeting student needs.

Coaches facilitate flexible, adaptable lessons and bring personalized learning to students with the help of community volunteers. Students and coaches work together to include student voice and choice in all projects as part of the PBL model.

PBL is authentic Project and Problem Based Learning.

Students practice professionalism and problem-solving skills in real-world projects.

A digital learning ecosystem built for future generations.

All students receive Chromebooks with wireless access and video cameras for 24/7, on-the-go learning.



Hands-on instruction is supported in an authentic environment.

Students build hands-on projects to master key concepts and skills and present their projects to the public.



Community Learning in Real-World Contexts

Students engage in service learning, internships, volunteering, and other forms of community learning that are critical to establishing relevancy between classrooms and the real world. Students work in partnership with organizations like the Food Bank,

Adult Day Health Center, and the Museum of . Every PBL unit incorporates community learning goals. Students work in supported communities as part of NASA labs, robotic workshops, internships, STEM days, and arts programs.

There's a

NEW REGIONAL STEM SCHOOL

in the [REDACTED] area!

The [REDACTED] is a free, public STEM school open to all NC students. At [REDACTED] passionate, accomplished educators offer innovative, hands-on instruction within a family-like environment.

Located on the campus of [REDACTED] University, the school features:

- Real-world, project-based learning
- Free college courses, credentials, and certifications
- Internship and job shadowing opportunities
- Advanced career-oriented course offerings in key STEM areas
- Personalized instruction
- 24/7 access to a laptop computer
- Free transportation, and free/reduced price lunches

Come find out more about what [REDACTED] has to offer.

You're invited!

DATE

LOCATION

LOCATION 2

TIME

Don't let your child miss
out on this **EXCITING**
OPPORTUNITY!

APPLY TODAY

[www.\[REDACTED\].org](http://www.[REDACTED].org)



APPLY NOW

Grades 7 - 11

The [redacted] is a
FREE, PUBLIC STEM SCHOOL OPEN TO ALL
NC students. At [redacted]
PASSIONATE, ACCOMPLISHED EDUCATORS
offer
INNOVATIVE, HANDS-ON INSTRUCTION
within a
FAMILY-LIKE ENVIRONMENT
on the [redacted] U campus.

Check us out at
www.[redacted].org



World Class STEM Education For ALL



INSCRIPCIONES ABIERTAS, APLIQUE AHORA!

Grados 7 - 11

La escuela

es,

**GRATUITA, ES UNA ESCUELA PÚBLICA ENFOCADA
EN CIENCIA, TECNOLOGÍA, INGENIERÍA Y MATEMÁTICAS
ABIERTA PARA TODOS**

los estudiantes de Carolina del Norte. En nuestra academia tenemos

**MAESTROS PROFESIONALES, PREPARADOS Y DEDICADOS
que ofrecen**

INSTRUCCIÓN APLICADA E INOVATIVA

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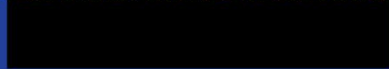
AMBIENTE FAMILIAR

ubicada dentro del campus de [REDACTED].

Visítenos en nuestro sitio de internet:

WWW. [REDACTED].org

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por internet o para aplicar en persona llámenos al:**



Educación de nivel Mundial en Ciencia y Tecnología para Todos

