

# VALUE AND VALUES

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How Parents Experience the Process of  
Choosing a School

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# 01. Executive Summary

The goal of this capstone project is to help an organization solve a problem of practice. We partnered with Southfield School, an independent elementary and middle school, struggling with increased attrition rates as the problem of practice. Our research goal was to provide solutions that may aid in both decreasing student attrition and increasing retention by assessing the ways parents select schools for their children and determining best practices based on comparable models. We examined empirical research to identify factors that have previously been correlated with parent decision making around school choice, conducted independent research using the jobs-to-be-done framework to determine specific factors associated within the context of this school, and developed solutions based on our findings.

Current literature helped us frame our problem of practice as well as isolate factors for our survey design. By better understanding what factors had been associated with school choice research and especially independent school choice decisions, we developed nine factors to investigate: academics, curriculum, financial, convenience, philosophy, extra-curricular, relationships, parent desire and student desire. From our research, we wanted to answer the following research questions:

## 1 Why do parents choose Southfield School?

## 2 Why do parents choose to exit or leave Southfield School?

Our research included administering online surveys to current and past parents as well as visiting the school to conduct in-person focus groups with current parents and teachers. We also interviewed the head of school, admissions director, and marketing director as leaders of the school and took a school tour. The school provided administrative data that assisted in better understanding the problem of practice and context of the school including admissions data, human resources data, and marketing data. Survey data was triangulated with focus group data to develop and support the following findings:



1. Parents choose Southfield primarily for academic reasons



2. Strong faculty increases student retention



3. Parents want to belong in the community



4. Finances, and a competitive free option, drive attrition at Southfield



5. Family relocation affects Southfield's attrition rate



6. Leadership changes have increased Southfield's student attrition

Simply put, survey data suggests parents choose Southfield School for academics and leave the school over finances, magnet schools, family relocation, and school leadership instability. Focus group data emphasizes community, strong faculty, and the competitive school market as the most important considerations in choosing Southfield or leaving Southfield. External factors such as location of the school within a city and location of the school in relation to other schools as well as COVID -19 considerations all play a role in understanding this schools' student attrition and retention rate as well as understanding parents' decision making around school.

The National Association of Independent Schools (NAIS, 2017) jobs-to-be-done research allows for further connections to be considered that help delineate the push and pull factors associated with parents' decisions about choosing an independent school. Costs are the most likely push factor away from Southfield while community and relationships along with teacher strength and longevity are important pull factors toward Southfield.

Answering our two primary research questions: why do families choose Southfield and why do families leave Southfield have led us to frame our recommendations around the central premise of how a tuition-based school can compete with the free schools which surround it.

Our recommendations include:



### **Revenue Quality: Overbooking**

Southfield School is operating at a loss and like many organizations, every penny counts. With approximately 12 students waitlisted annually, we see an opportunity to enroll those children with the potential additional income of approximately \$150,000.00. This strategy of overbooking attempts to recognize that families will leave.



### **Customer/Consumer Service: The Nordstrom Effect**

The next recommendation is centered on the premise that when a person buys a premium product they expect to receive first-rate premium customer service. We have adapted the phrase, the Nordstrom Effect. Nordstrom department stores are nationally known for exemplary customer service and high-end products. Southfield has the recipe to secure its market share as a luxury provider.



### **Market Differentiation: Opportunities**

We know that Southfield is in a saturated market with free competitors, if the neighboring magnet school is similar in most ways (e.g., academically, athletically, etc.) apart from the lack of annual tuition, then convincing families to enroll and stay at Southfield becomes a matter of differentiation (e.g., athletics, robotics, languages, etc.).

These recommendations offer considerations that we believe could help the school to reduce attrition and increase retention based on our research and findings. While no recommendations offer the panacea, these recommendations offer research-based ideas from which the school may begin to strategically plan for the future.



## 02. Project Introduction

Independent schools are, in some ways, an anomaly in education. Their independence from the public school system allows freedom to operate without specific governmental regulations and restraints, but that freedom comes with a price. The costs are significant for families. Further, this mix of business and education leads to an inevitable partnership between commerce and education for independent schools. In pursuing this project, then, it only made sense for a like partnership to form to explore our problem of practice: increased student attrition rates at an independent school. With backgrounds in the areas of education and business, our capstone team is uniquely primed to understand our problem of practice from two unique perspectives- values and value. We applied our broad knowledge in the

fields of education and economics to our research to uncover specific contextual reasons for the attrition rate increase at Southfield School and offer unique insight and solutions to enhance this school's student retention rate.

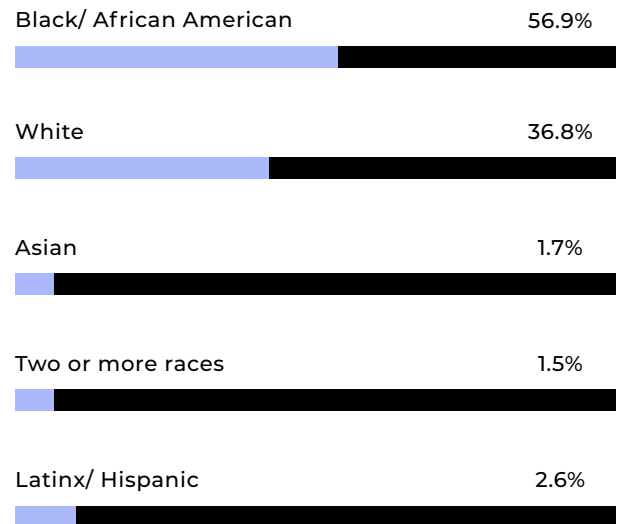
This project is specifically interested in serving the needs of Southfield School rather than producing generalizable findings outside of this context. Still, we hope our project can also offer insight and a path for other independent schools who may struggle with increasing attrition rates. When independent schools unlock the keys to understanding parent decision-making around choosing schools, they gain financial security which allows for increased emphasis on high quality programs and academics.

## Organizational Context

Southfield School is a pre-K through 8th grade independent school nestled in the historic South Highlands neighborhood in Shreveport, Louisiana. The school opened in 1934 and has operated for 88 years. It has a history of developing students who do well in the high schools they attend after leaving 8th grade and earn honors like Valedictorian, National Merit Semi-Finalist, Eagle Scout, and other academic and community honors ([www.southfield-school.org](http://www.southfield-school.org)). All of Southfield’s 2015 graduates are currently attending college. While the school began as a K-12 school, today it serves 371 preschool students through eighth grade students. The school website highlights unique programs including a third-grade humanities focus, a STEM lab, and a preschool teaching kitchen. The school website also touts “the joy of learning” and a collection of videos, made by teachers and students, help visitors imagine this experience ([www.southfield-school.org](http://www.southfield-school.org)). A Shreveport Times 2016 article, *Historic South Highlands Continues to Evolve*, mentions “Southfield School as one of the top three schools in northwest Louisiana” (Watson, 2016). An informal survey on the South Highlands neighborhood Facebook page asked, What good pre-k options are available in this area? Southfield is indicated in 25 of the 55 responses. This popular media indicates that Southfield School is recognizable in the community. From an educational standpoint, it seems that this school represents what all par-



2020 US Census: Shreveport, LA



**21%**

of Southfield students represent a racial or ethnic group other than White (2021).

ents would want for their children, yet a recent increase in student attrition rates suggest that there are other factors to consider. Thus we seek to better understand the problem of student attrition at this school and the underlying factors in decisions that parents make regarding school selection.

Shreveport, Louisiana is known as part of the Ark-La-Tex area where the three states of Arkansas, Louisiana, and Texas meet. While Shreveport is often recognized as the center of this region, it has seen a decrease in popula-



tion from 2010 to 2020 according to US Census data ([www.census.gov](http://www.census.gov)). Shreveport is a diverse community. 2020 US Census data indicates that 56.9% of Shreveport is Black/African American, 36.8% is White, 1.7% Asian, 1.5% two or more races, and 2.6% Hispanic or Latino of any race. Southfield School explicitly appreciates diversity and offers the following mission statement:

The vitality of a community is enhanced by its diversity, and our commitment to learning goes hand in hand with a commitment to safeguarding diversity in our student body and faculty. We seek to create an atmosphere that challenges us to open our minds and hearts to others, to understand and celebrate our differences, whatever they may be, and to discover common ground. At Southfield School, we embrace and celebrate all cultures. We welcome the opportunity to expand and enrich our Southfield family. Southfield is committed to seeking diversity of race, religion, and ethnic origin among its students and faculty.  
(Southfield School, 2021).

While Southfield’s website promotes diversity, Southfield School does not currently match the demographics of the city of Shreveport. At Southfield, 21% of students represent a racial or ethnic group other than White and according to Southfield’s admissions data, Southfield’s racial diversity has seen a slight decrease in the past two years (21% students of color in 2020-2021, 25% in 2019-2020). Increasing student diversity continues to be an important goal for the school, as expressed by school leadership and the parent participants in our focus group discussions.

Southfield’s campus reflects its history. A combination of historic buildings and new construction visibly blend tradition and innovation. Newer buildings showcase STEM programs and highlight the strong preschool program while the original buildings offer the appeal of the neighborhood, matching the nostalgic style of the historic homes in the area. The very close proximity of Southfield to South Highlands Magnet School and several other nearby public and private schools emphasizes the competitive educational market in this area. The map in Appendix G illustrates this

further, showing five additional schools within two miles of Southfield School.

Southfield School’s mission to promote lifelong learning is supported by 76 employees, 59 teachers and teaching assistants, three division directors, nine business office employees, seven support staff employees, and the Head of School. As we began our research, the Head of School had been the educational and business leader of this organization since 2018. More recently, leadership has changed, and the long-time former head of school is serving again as the Interim Head of School. A new head of school will begin in July 2022.

The recently hired head of school, beginning in July 2022, is returning to Southfield School where she formerly served as second-grade teacher, assistant preschool director, and assistant head of preschool through second grade. She is supported by the Board of Trustees and the Foundation Board which help to guide the fiscal and strategic long-term planning of the school. The Southfield School website says, “At Southfield, our talented and experienced faculty cultivate curiosity, character, kindness, and a lifelong love of learning” and goes on to explain that Southfield does not “teach to a test” and “helps students find the joy of learning.” Southfield’s website touts the creation of a partnership among faculty, parents, and students ([www.southfield-school.org](http://www.southfield-school.org)).

### Problem of Practice

While this school has successfully served its students for 88 years, Southfield School, like all schools, is not immune to operational issues. As a result, the problem of practice that we will examine in this study is the increasing student attrition rates at the school. Available data suggests students are forfeiting their spots and leaving the school at higher than median independent school rates nationally (16% attrition in 2019-20, 22% retention in 2020-2021, 14% retention in 2021-2022) (Southfield, 2022). The National Association of Independent Schools (NAIS) facts-at-a-glance 2020-2021 lists the median student attrition rate as 9.6% and the average attrition rate as 12.2% (NAIS, 2020). While the school’s target enrollment at each grade level is 40 students, the primary levels (preK-2, preK-3, preK-4), kindergarten, and sixth grade are the only

**Table 1:** Possible issues that may lead to attrition

Competitive Market	Lack of Trust/ Commitment (National Trend or Local Issue?)	Lack of Connection/ Relationships to School Community	System Design
Free vs. Paid Education – Families jump ship for free public education at K level	Possible trend toward less trust in institutions across nation	Parents/students did not meet friends/build relationships over first 3 years that tie them to school	Moving from brand new building to older building – does this feel like a downgrade?
Customer Satisfaction Value Added – Parents may not feel totally satisfied with what they are getting in the first 3 years	Parent buy-in; does “portrait of grad” feel too far away; need better connection to next division? End of a division feels like a stopping/transition point?	Did not live up to family’s expectations when they signed up for this school	Is too much emphasis placed on the higher levels like middle school or particularly 8 <sup>th</sup> grade?
Religious/Nonreligious – Families shift to a religion-based school to grow children’s faith systems	What is the school’s story/mission/reason? Mission statement is generic – What is the story this school has to tell?	Families always had this plans to leave after PK, so they never fully invested in making connections	Do parents know enough about what is happening at the next level to stay invested? Are the breaks in divisions in the right places? Do breaks in the divisions feel like good places to break up?

grade levels that have met the goal or nearly met the goal in the last two years, with all other grade levels dropping to the thirties, twenties, or teens (Southfield, 2021).

To address our problem of practice, we would like to know more about reasons that contribute to the retention and attrition rates of Southfield’s students. Specifically, we hope to uncover factors contributing to why families leave after preschool or kindergarten and what might improve the attrition rate. Retaining students is a critical component to the financial health, program quality, enrollment growth, word of mouth advertising, donor partnerships and positive community culture of independent schools including Southfield. As a result, Southfield has many initiatives designed to attract and retain students such as on-campus behavioral therapists for speech and occupational therapy, a full-time dyslexia therapist, and a variable tuition model—yet the attrition rate is strikingly high at 14%-22% in the last three years.

Some of the possible causes of student attrition from primary to lower school at Southfield include the competitive school market with popular public magnet schools nearby, a shift in local or nationwide trends among families and their valuing of private school education, or factors related to family commitment to the school. School dissatisfaction, possibly based on lack

of connection to the community, as well as systematic decisions within the school may also play a role in this issue. Table 1, above, suggests some possible areas to explore as we seek to better understand this issue.

Our study aims to extend the available research regarding how and why parents select independent schools by examining why current parents chose Southfield School and what has caused former parents to leave this school before the end of its academic program. More specifically, this study also aims to understand choice at Southfield and the importance of personal values and economic value for parents in their school choice decisions.

**Increased student attrition rates pose a problem of practice for this organization.**

## 03. Literature Review

We will take a stratified approach to understand the available body of knowledge surrounding school choice by examining current literature around why and how parents make decisions about schools by first looking at values associated with parent decision-making about education, then assessing how economic value plays a role in parent decision independent school choice, and finally determining how personal values play a role in the selection of independent schools. This stratified approach will allow us to better assess and diagnose the phenomena of dropping enrollment and increased attrition at Southfield School.

### The Values Associated with Parent Decision-Making about Schools

All parents make school choice decisions for their children whether they realize it or not. For some, school choice is almost invisible. Parents may keep their children at home until school-aged and then send them to their local, assigned, elementary school. Whether conscious or not, the decision to attend a zoned neighborhood school is a school choice decision. For these parents, the first active school choice decision might come at the college level.

For other parents, choosing a private pre-kindergarten program might be the first instance of school choice decision making. At pivotal points throughout their child's education, deciding whether to continue a private school track or transition to the neighborhood elementary school could prompt another school choice. A school choice decision might also arise if parents decide that they are unsatisfied and that their child needs to change from one school to another. While it is critical to understand the impact of school choice programs, it is also important to better understand why parents opt-out of public schooling, choosing to pay for tuition-based programs such as in-

dependent schools. While much research exists around parent decision-making and school choice, very little academic research exists to explain how independent schools are specifically selected and what may lead a parent who has selected an independent school to leave.

Programs designed to influence and support specific school choices are not new. In the last twenty years, vouchers, tax credit scholarship programs, increased number of charter and magnet schools, virtual schools, and educational savings accounts have made public and private school choices available to those of all socioeconomic statuses. As a result, parents have had the opportunity to value and select schools beyond their zoned or assigned schools for many years. Lincove (2018) calls this a "portfolio" of school options in her study of schools in the New Orleans area.

This "portfolio" descriptor showcases that school choice programs come in many varieties and have been designed to meet many different needs. Yet even with the wide suite of opportunities available to all parents, school choice options are more frequently utilized by higher socio-economic households (Bosetti, 2004; Holme, 2002; Hubbard, 2019). Parents with available resources may choose to move closer to a higher quality school, enroll in private schools, apply for specialty programs such as magnet schools, list better schools higher in a ranking system for school choice, and advocate for school improvements (Bosetti, 2004; Holme, 2002; Hubbard, 2019; Phillips, 2012; Prieto, 2014). Researchers attribute this to the fact that higher socio-economic status (SES) families often live closer to better schools which allows time to develop tools and resources and provides flexibility to invest hours and energy into school choices (Holme, 2002; Hubbard, 2019). However, socio-economic factors are not the only demographic factors that affect school choice decisions.

Researchers find that school choice often leads to increased racial segregation (Dauter & Fuller, 2019; Holme, 2002; Prieto, 2014; Schneider, 2002). Comparing parent surveys with an examination of internet searches on a school choice website finds that parents' actions speak louder than words when it comes to choosing schools that are racially segregated (Schneider, 2002). While parent surveys report that race is not a factor in their searches, parents consistently searched for demographic information on the website, indicating that these characteristics are more

important than parents may admit on surveys (Schneider, 2002). Parents applying to school choice programs are likely to choose schools where the majority of students match their own race (Prieto, 2019).

Besides potentially promoting segregation, critics argue that school choice programs, specifically voucher programs, have not shown positive impacts in student achievement (Anders et al., 2016; Ravitch, 2016). Program evaluation of the DC Opportunity Scholarship found no significant difference in student achievement between treatment and control groups and no significant difference among parent satisfaction or perceptions of school safety between the treatment and control groups. It did, however, find significant differences in student satisfaction and safety reporting (Webber, 2019). Students believed they were happier and safer in private schools. The Louisiana Scholarship Program found a statistically significant positive impact on math scores for public school students (Egalite & Mills, 2021). This finding might indicate that the competition for students, brought about by the voucher program, may have helped public schools in Louisiana to improve. Both evaluations relied on student testing to measure achievement despite concerns about that type of data.

Using student standardized testing to measure student achievement, while used in many studies, is somewhat controversial (Rapposelli, 2021; Tenam-Zemach, 2021). Independent or private schools may place less emphasis on standardized testing or provide less practice for test taking. Whether achievement should be measured by testing is outside the scope of this research but is important to note how often the topic of school choice impact is tightly woven with standardized testing to provide outcome data which is often used by government officials and constituents to argue for or against these types of programs.

Whether looking at school choice as part of a federal or state program or simply employing school choice decisions privately, understanding parent decision-making around school choices is complex. The rational choice process occurs when parents select specific external criteria and use these criteria to choose the best schools they can for their child (Bosetti, 2004; Burgess et al., 2015; Krull, 2016). Researchers, however, rarely agree on which external factors par-

ents are looking for in school choice decisions. Some research has highlighted the importance and value of school quality or achievement as related to test scores (Rapposelli, 2021; Tenam-Zemach, 2021). In a Milwaukee study, Krull (2016) found that parents of all socioeconomic and educational levels looked for high quality academics. High quality academics are often measured by test scores, or school report card data produced by state departments of education. Other studies looked at external criteria for school choice decisions including school safety, religious belief or specific values, location, or various other factors (Bosetti & Pyryt, 2007; Cucchiara & Horvat, 2014; DeAngelis & Lueken, 2020; Markow, 2007). In some research, school safety issues are valued reasons for choosing one school over another (DeAngelis & Lueken, 2020).

There can also be differences in school choice decisions made when children initially enter school versus school choice decisions made when families leave one school for another. Mid-program mobility is often related to family needs like moving or family dissatisfaction with the current school (Dauter & Fuller, 2019). When parents are dissatisfied with the child's school, they report that they are looking for higher quality teachers, better programs, more activities, or that they are leaving a bad situation behind such as poor school climate, fewer opportunities for parent involvement, or bullying (Bejou, 2012; Goddard, 2000; Hubbard, 2019; Olsen Beal & Hendry, 2002). Researchers disagree about which external elements are the most important. While all factors may contribute to parent decisions in a specific context, none lead to a panacea which explains the reasons for all school choice decisions. Quite possibly, external factors are not as important because parent decision making, rather than following a rational choice approach, relies more so on identity.

Taking an identity approach to parent decision-making around schools, Cucchiara and Horvat's (2014) ethnographic research introduced the idea that "school choice was more than just a search for the best school for their children. It was also . . . an articulation of who they were as parents and people" (p. 488). This identity related research suggests that families look for schools in much the same way that consumers might look at products, purchasing those that align with their values and needs while rejecting those that seem in opposition to beliefs, values, or needs. In a study of high school stu-

dents leaving public schools, parents involved in the study indicated that they were looking for schools based on values or beliefs that were misaligned with their current school (Hubbard, 2019).

Parents can be even more concerned with perception and identity in school choice decisions than their child's interests (Cucchiara & Horvat, 2014; Olsen Beal & Hendry, 2012). Cucchiara and Horvat (2014) observed that parents in parent group meetings—a “forum” promoted by the school for parents interested in the school—spent more time introducing themselves and their own experiences than they spent talking about their children, highlighting the importance parent identity plays in school choice decisions. Olsen Beal and Hendry (2012) shared the thoughts of a Chief Academic Officer from their study who stated “we’re a consumer society. Parents are gonna apply ruthless self-interest to the decision about where to send their child” (p. 538). The aggregated research indicates that when making meaning of the child's school choices, parents are likely thinking about how the school choice represents their family's values or philosophies as well as what their choice says about them or their identity as a parent.

Emotion is therefore entwined in the process of making meaning of a situation. While not specifically related to parent decision making, Carton's (2017) research on NASA and job satisfaction is useful to explain the importance of meaning-making and the value of ultimate aspirations on personal identity. He found that employees consider work to be more meaningful when they feel connected to the overall goals of the organization and can help to explain the deeply symbolic nature of identity that parents might feel when selecting a school for their child (Carton, 2017). Some parents understand the school choice decision as a form of aspiration for their child by looking at the kind of person they hope their child will become in the long-term or the kind of college their child might attend in the future. In connecting their own values to the goals they have for their child, they realize a sort of “ultimate aspiration” for their child and a kind of school they want their child to attend that may help him or her reach this goal (Carton, 2017, p. 324). Unlike rational choice theory, this does not always mean that the child will attend the highest quality school with the best test scores. In Cucchiara and Horvat's (2014) study, parents noted that they had to choose

schools that aligned with “who we are” and “the human beings we are” (p. 498). This desire for a school to match the parents' identity or perceived identity and for that to be apparent to others in their community highlights another important factor in school choice decision making research (Cucchiara & Horvat, 2014; Olsen Beal & Hendry, 2012).

Parents trust their social networks. Researchers suggest that parents choose schools based on the views of their friends, family, and community (Cucchiara & Horvat, 2014; Holme, 2002; Hubbard, 2019; Olson Beal & Hendry, 2012; Phillips et al., 2012). In a study of parents in Louisiana selecting preschools, 40% of parents chose a preschool within one day and 68% of the parents studied looked at only one option (Bassock et al., 2018). Parents in this study reported caring about the quality of the program but lacked information about program quality, outside gathering information from their social networks (Bassock et al., 2018).

Hubbard's (2019) research also points to efficiency and social networking in parents' school choice decisions. Offering a different perspective, Raveaud and Van Zanten (2007) say that parents act as a reference for other parents when making decisions. This grapevine approach to choosing schools is mentioned throughout research (Bosetti, 2004; Holme, 2002; Olsen Beal & Hendry, 2012; Phillips, 2012; Raveaud & Van Zanten, 2007) likely because it makes decision making easier and takes the pressure off parents to make important decisions alone.

Holme (2002) examined the idea that parents are not looking for academic quality, as evidenced by interviews, indicating that parents knew little about their chosen school's programs or philosophy. Rather, parents may be more interested in approval from their social connections and enhanced reputation among their social community (Holme 2022). Bosetti and Pyryt (2007) offer insight through an interview with a parent:

When we moved here...our top priority in choosing a house was to be within walking distance of a good school. My husband and I drove around all these lovely neighborhoods where we had heard there were great schools and looked for 'For Sale' signs.

(Bosetti and Pyryt 2007, p. 98).

A parent in Holme's (2002) study suggested,

We didn't even look because the schools...they're just bad. Everybody we know who lives in [that area], they all send their kids to private school. (p. 193)

Trusting others' views of schools and using this information to make important life purchases such as homes is seen throughout the literature (Bosetti & Pyryt, 2007; Holme, 2002), highlighting the value of school reputation and the reliance on community for parent decision making.

Parenting is full of difficult decisions. Having a social network or community to rely on for decision making advice can make this easier for parents. Hubbard (2019) explained that when parents are seeking information from social networks about school decisions the reactions from other community members may influence the parents' decisions which indicates the importance of relationships and social networks to parents. In essence, the parents' social network either encourages them to change or rallies support for staying in the current situation. Whatever the influence their communities have on them, parents also play a role in constructing the communities or social networks that in turn support their decision-making processes.

When parents do not feel supported by the community, they are more likely to decide to leave the community. Dauter and Fuller (2019) suggested that student mobility may relate to the students' or families' position in "the social field of the school and the nearby organizational ecology" (p. 34). Social positioning can play a critical role in a student's school success and a family's satisfaction with school. When children are thriving academically and socially, there is less likelihood that they will exit the school. When students leave one school mid-year, they are more likely to engage in further school changes in the future (Dauter & Fuller, 2019). Likely, this is tied to social connections and feelings of belonging within a community.

Parent decision-making around school choice is broad and complex, often involving consideration of the child's interests, family's values or goals for the child, and the social role of the family in the school and community. As a result, a detailed exploration of parent expectations involving school selection and

school mobility can help independent schools or private schools improve retention and fulfill their missions effectively. Personal values play an important role in school choice decisions, but tuition-based schools must also examine the importance of economic value in school choice decisions.

## Does Economic Value Play a Role in Independent School Choice?

While much research exists to suggest that voucher programs provide opportunities for lower income families to choose private schools, eighty-one percent of independent schools in the National Association of Independent Schools (NAIS) who responded to the 2017 NAIS Government Programs Survey said they do not participate in any federal voucher programs (NAIS, 2017). Only twenty-seven percent of independent schools who responded from a state with a voucher program reported participation in the program (NAIS, 2017). Researchers reported that independent schools shy away from these state and federal programs due to the increased oversight, low amount of funding, paperwork, and "strings attached" to these programs (NAIS, 2017). If policy makers want private schools to participate in voucher programs, issues like voucher value, autonomy in admissions policies, and testing mandates must be considered (Egalite & Mills, 2021). The hesitancy of private schools to participate in governmental programs could potentially be inferred from the participation rate on the NAIS government programs survey on the topic. NAIS reported that the survey was mailed to 1,341 business officers in NAIS affiliated schools and only 411 responded for a twenty-nine percent participation rate (NAIS, 2017).

Independence is one factor that distinguishes independent schools from other types of private schools. Some parents may not even realize that private schools are very different. Categorizing all private schools as independent schools is a mistake; an independent school is just one type of private school. Private schools vary greatly in size, scope, traditions, type, and mission: faith-based schools like Catholic, Quaker, Baptist, Seventh-Day Adventist, Jewish, Mennonite, Episcopal, as well as special interest schools such as Montessori, Waldorf, military, and in-

dependent schools are just a few of the varied private schools that currently exist in the United States. While all private schools use similar tuition based operational models, independent schools distinguish themselves from other private schools in several important ways.

First, independent schools are not supported or controlled by any other for-profit or not-for-profit entity such as a church or business. While some independent schools are religious-based, school business is separate from church operations or control. While all independent schools vary in philosophy and mission, they are similarly run by their communities through a board of trustees. NAIS says that unique missions are an important feature of independent schools (NAIS, 2021). We did not find recent literature focused on American Independent school mission statements, however, a study of Canadian private school mission statements suggests that independent school mission statements commonly appeal to tradition, mention academic or intellectual development, and include references to “lifelong learning” or “critical thinking skills” (Boerema, 2006, p. 195). Mission statements vary considerably between religious-affiliated schools and non-religious schools due to the emphasis on religious values (Boerema, 2006).

Independent schools are just one of the many private school options available in the United States and occupy a relatively small space in the market. Some literature indicates that private schools help public schools by reducing the number of children in public schools and increasing public funding for these schools (DeAngelis & Lueken, 2020). Today, there are approximately 703,000 students that are enrolled in independent schools (NAIS, 2021). Broadening to include all private schools, the National Center for Educational Statistics Private School Universe Survey and the National Center for Educational Statistics’ Digest for Education Statistics shows that private school enrollment has remained steady, at approximately eight to nine percent of the total population of US school children (preschool-12th grade) since 2005 (NCES). Given the steady enrollment in tuition-based schools, research can help us to better understand why parents are choosing (or not) independent schools over other school choice options.

Cost is a considerable factor in whether parents choose an independent school (Bosetti, 2004; Cucchiara & Horvat, 2019; Hubbard,

2019; Lincove; 2018). Independent schools require parents to pay tuition as well as additional costs for supplies and materials. Higher socioeconomic households have greater ability to afford independent schools for their children with their own means; however, independent schools often have healthy financial aid funds available to mid-income and lower income families. These funds often allow children from a variety of family incomes to enroll and participate in the school. One challenge for independent school enrollment is helping families, who do not see themselves as private school families, investigate this option.

In Cucchiara and Horvat’s (2019) ethnographic work, an interview with a parent revealed some tension among choosing a private school for her child and the differences among the financial situation of their family versus the other families in the school; she worried that it might “become a lot more obvious over time that a lot of them have a lot of money” (Cucchiara & Horvat, 2019, p. 503). This fear of being seen as an outsider in the community due to financial aid standing or lower income levels can be a barrier to parents exploring independent school options. Often when families learn that an independent school is accessible to them through support programs, they must reconcile feelings about income levels, socioeconomic status, and obvious financial differences in the community.

From a microeconomic and business perspective, there are three specific considerations that require additional review in the context of understanding that school choice is a consumable product that is repurchased (or not) by parents on a yearly basis. The first of which is the price elasticity of demand and an analysis of the extent to which schools are either elastic or inelastic. The National Business Officers Association (NBOA) studied the elasticities of private schools in 2017 to determine whether private school tuition was subject to demand fluctuations based on increasing or decreasing costs of enrollment (ISM, 2017). The results were fascinating: the study concluded that no mathematically significant relationship existed between enrollment demand and rising costs in tuition, thus proving that the price (cost) of private schools is inelastic. This information is critical to our study as it helps to eliminate some possible reasons for student departures from Southfield School—increased tuition is likely not a factor.

It is important, however, to keep in mind

the possible impact “free” might have on independent schools. Based on the Harvard Business Review (HBR) threat Assessment (Bryce, Dyer, & Hatch, 2011; see figure 1) Southfield School is in the “immediate threat” category due to the current defection rate of students (-21.8%).

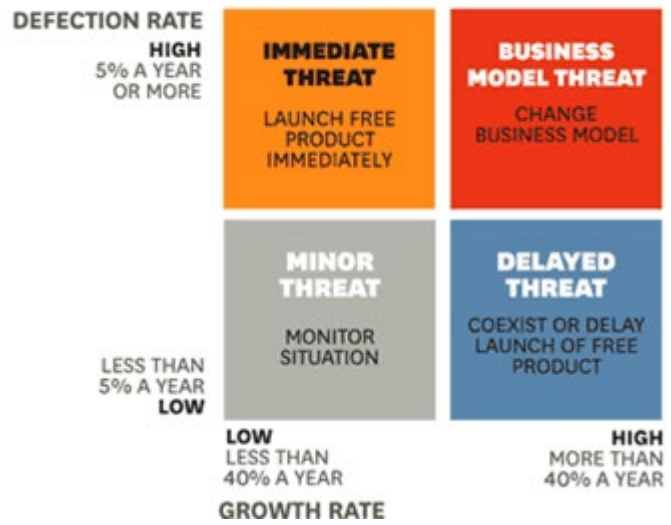
The next economic consideration is pricing strategy (see figure 2), which is an effort to better define and articulate how price and quality interact to demonstrate product value. As with many private and independent schools, the product positioning, compared to the public and magnet alternatives, must be seen as premium or luxury. That is to say, the price is higher than public school alternatives because the quality of the product is superior. If that statement is untrue, then competing with free is not possible.

Another economic consideration is the perception of value amongst the consumer base. Selling the value is the ability of an organization to justify the premium product placement in the pricing strategy matrix. Said plainly, the central question is: what makes your school worth the expense? Perception of value will be an important variable in our study of Southfield School as we uncover the differentiators that make Southfield unique in the Shreveport educational market.

The final economic consideration involves the scarcity principle as related to pricing theory. According to the scarcity principle, the price for a scarce good should rise until a market equilibrium is reached between

Figure 1: HBR Threat Assessment

HOW BIG A THREAT IS “FREE” COMPETITION?



Note: This figure from Bryce, Dyer, & Hatch, 2011 demonstrates the threat of free competition

supply and demand. However, this would result in the restricted distribution of the good to only those who can afford it.

In economics, market equilibrium is achieved when supply equals demand (Chen, 2022). If there are mismatched levels of supply and demand in the economy, a phenomenon referred to as disequilibrium occurs. When the supply of a good is greater than the demand for that good, a surplus ensues which drives down the price of the good. When demand for a commodity is higher than the supply of that commodity, the resulting scarcity leads to higher prices for that product (Hayes, 2021). For example, if the market price for wheat goes down, farmers will be less inclined to maintain the equilibrium supply of wheat to the market since the price may be too low to cover their marginal costs of production (Tuovila, 2022). In this case,

farmers will supply less wheat to consumers, causing the quantity supplied to fall below the quantity demanded (Kenton, 2021).

In a free market, it can be expected that the price will increase to the equilibrium price, as the scarcity of the good forces the price to go up. When a product is scarce, consumers are faced with conducting their own cost-benefit analysis; a product in high demand but low supply will likely

Figure 2: Pricing Strategy Matrix





be expensive (Hayes, 2021). The consumer knows that the product is more likely to be expensive but, at the same time, is also aware of the satisfaction or benefit it offers. This means that a consumer will be more likely to purchase the product if they see a greater benefit from having the product than the cost associated with obtaining it.

Consumers place a higher value on goods that are scarce than on goods that are abundant. Psychologists note that when a good or service is perceived to be scarce, people want it more (Ballina, 2019; Cialdini, 2009). Consider how many times you've seen an advertisement stating something like this: limited time offer, limited quantities, while supplies last, liquidation sale, only a few items left in stock, etc. The feigned scarcity causes a surge in the demand for the commodity. The thought that people want something they cannot have often drives them to desire the object even more. In other words, if something is not scarce, then it is not as highly desired or valued. This connects to school choice decisions as well. When schools are able to show distinction in a competitive market or otherwise be seen as "uncommon" they increase their status in the market (Saltman & Means, 2019, p. 263). Schools that do not separate themselves as something more special in the market lack desirability. Being an elite school is based on the principle of scarcity; it is prized because it is scarce (Saltman & Means, 2019).

Marketers use the scarcity principle as a sales tactic to drive up demand and sales. The psychology behind the scarcity principle relies on social proof and commitment. Social proof is consistent with the belief that people judge a product as high quality if it is scarce—or if people appear to be buying it. On the principle of commitment, someone who has committed themselves to acquiring something will want it more if they find out they cannot have it.

Most luxury products, such as watches and jewelry, use the scarcity principle to drive sales. Technology companies have also adopted the tactic to generate interest in a new product. For example, Snap Inc., unveiled its new spectacles through a blitz of publicity in 2016. but the new product was available only through select popups that appeared in some cities. Tech companies may also restrict access to a new product through invites. For example, Google launched its social media service, Google Plus, in this manner. Robinhood,

a stock trading app, also adopted a similar tactic to attract new users to its app. The ridesharing app Uber was initially available only through invites. The idea behind this strategy is to place a social value on the product or service and leverage the idea of exclusivity.

In the educational setting, when there are multiple schools in a tight geographic area, there is no scarcity. When there is no scarcity, it is difficult to sell the school as a premium product in the school market. It simply does not have the same market value. The scarcity philosophy is a driver in pricing strategy for independent schools. Schools have to think, how is our product unique, what do we offer that other schools around us do not, and what is the demand? When the demand is low, the school must differentiate from other nearby schools to be successful at selling their school.

## Does Availability of Schools Influence Decisions?

Beyond finance, school types can also influence parent decisions regarding independent schools. In the Los Angeles Unified School District (LAUSD), an average elementary student lives within a two-mile radius of 14 public schools, seven religious private, schools, three secular private schools, and a magnet and a charter school (Dauter and Fuller, 2019). While specific to LAUSD, this average shows a relative likelihood that many urban parents have more than the neighborhood school from which to shop for schools for their children.

Magnet school research indicates that while magnet schools were originally designed for the purpose of desegregating schools and increasing diversity, many are now more focused on offering specialty programs and, as a result, have increased selection criteria and decreased accessibility resources such as transportation, effectively making enrollment more difficult for lower income families (Olsen Beal & Hendry, 2012). Strong magnet school programs are a direct competitor with independent schools, especially when they offer a similarly unique program in the community such as a foreign language immersion school or STEM school. High-quality magnet schools are important school choice options for independent school leaders to identify and monitor as they provide unique programs within the public-school field. Independent schools must be able to clearly explain and market their goals and missions for parent consumers to justify the ad-

ditional cost.

When looking specifically to identify the way school availability specifically affects independent school selection, separate from the larger private school data, most of the available data comes from independent schools themselves. Independent school associations spend considerable time and resources on current research within the independent school industry but the use of this research may yield results that unequally favor independent schools.

A white paper by Symmonds and Associates (2010), a strategic analyst for independent schools and private universities, found that parents reported their desire for personal attention for their children at school as the top reason for choosing an independent school. The assumption that smaller class sizes offer more personal attention has been debated in current literature with recent studies finding very little significant positive effect of small class sizes on achievement (Browne, 2017; Filges, 2018). Still, the personal attention parents want from independent schools may come from the smaller overall size of the student body. This small school feel may yield what Epstein (2010) described as “caring in schools” (p. 7). Epstein (2010) says, “the way schools care about children is reflected in the way schools care about the children’s families” (p. 7) which may be an area where independent schools have an advantage over many other types of schools.

Very recently, the COVID-19 pandemic has played a role in the increase in enrollment in some independent schools which offer in-person learning. Scafidi (2021) found that in areas where public schools were open for virtual learning only, independent schools saw an increase in enrollment. Continued research will be needed in the future to determine if the parents that chose independent schools for their children for the 20-21 school year, due to in-person learning, continue to enroll in these schools in the future. The pandemic has not been a boon to all independent and private schools however as it closed the doors of some schools which had been operating for many years. The CATO Institute recently reported that 12 independent schools have closed due to the coronavirus pandemic (2021). The report indicated a worst-case financial scenario for public schools, if all children who attend private school that have closed enter public schools and tax existing

resources. Increased stress on the public education system due to increased enrollment could offer further support for recognizing a beneficial symbiotic relationship among independent/private schools and public schools.

In examining when parents typically decide to send children to an independent school, Bosetti and Pyryt (2007) suggest that parents often make this decision early on. These initial decisions do not always predict that independent school children will remain in independent schools throughout their educational experience. Possibly, feeling comfortable making one school choice decision leads a family to feel more comfortable continuing to make these types of decisions throughout the child’s educational journey if they are not satisfied with the perceived quality of the school (Chakrabarti & Roy, 2010). For families who leave schools, the most common reasons within the research are parent dissatisfaction, financial reasons, frustration with school policies, teacher or leadership decisions, or bullying/perceived bullying (Beebe, 2014; Bejou, 2012; Catt & Cheng, 2019; Chakrabarti & Roy, 2010; Markow, 2007). Stratification of age levels and grade levels with respect to school choice reflects specific differences among elementary parents’ decisions about schools.

## Do Social Factors Influence Decisions?

A child’s age can be an important factor in parents’ school choice decisions. While affluent families are more likely to make conscious school choice decisions overall, parents of elementary-aged students are more likely to move children from one school to another than parents of secondary children (Dauter & Fuller, 2019). Elementary students are less likely to move schools if the schools are charter or magnet schools, the school buildings are newer, the teachers have higher levels of training, and the staff-student ratio is smaller (Dauter & Fuller, 2019). School level performance, at the elementary level, is not a strong indicator of student movement (Dauter & Fuller, 2019). This may be due to the emphasis placed on social-emotional skills and relationships in elementary school. Parents want children, in elementary school, to successfully build relationships with peers and teachers and to be given personal attention. NAIS (2002) says that secondary schools are somewhat, but “not overwhelmingly” likely to experience lower attrition rates than elementary schools. In their study, nineteen percent of

the low attrition rate schools were elementary compared to thirty percent secondary (NAIS, 2002).

Parent involvement decreases with the age of the student. This could be a factor that affects school choice more directly in elementary schools. Harris and Robinson (2016) suggest that “the benefits associated with parental involvement appear to be strongest for younger children (grades 1 to 5)” (p. 187) and offer a different view of how parents help children flourish throughout school. In a focus group study, college-age students were asked what their parents had done to make them academically successful. The students reported that parents cared and supported them with academics and activities outside of school, parents acted as school navigators finding the best schools for their children, with many selecting private schools or making “vigorous efforts to enroll them in high quality public schools” and parents stressed the importance of school (Harris & Robinson, 2016, p. 188). This stage-setting approach indicates that it is the behind-the-scenes involvement of parents or parents who help children create a “life space” for learning rather than parental involvement that is key to growing successful students (Harris & Robinson, 2016, p. 188). The decisions parents make about school choice can help to set the stage for future academic success.

Student mobility in early elementary may be a function of strategic long-term planning by parents. Preschool-age children sometimes begin in private or independent school programs and then move to public school programs once they are eligible. Parents of preschool-age children may value the educational quality of a private pre-K program over that of a daycare if the cost is comparable or even higher as it is for a short period of time. Once children are eligible for public school, the cost may seem less appropriate for the family moving forward. If independent schools understand the effect of this phenomenon on their enrollment, they could plan for the inevitable attrition or develop methods that could entice or encourage these families to stay enrolled. This study seeks to better understand this situation and offer possible solutions for one Louisiana independent school.

## Looking at Louisiana

Louisiana is an ideal state in which

to examine school choice options. Politically, Louisiana has several programs aimed at providing school choice program options for all families including charter and magnet schools, tax credit incentives, and a statewide voucher program. Data accessible from the Louisiana Department of Education shows there are 42 public schools in the Shreveport/Caddo Parish area serving elementary and middle school students, including 8 magnet schools (louisianabelieves.com). There are 2 public charter schools serving elementary students and there are 16 nonpublic schools serving elementary and middle grades in Shreveport and Bossier City (louisianabelieves.com).

School report cards for the eight magnet schools in Shreveport, serving elementary and middle grades (ps-8) in 2019, demonstrate clearly that the magnet schools outperform other public schools in the Caddo Parish district. Six of the eight elementary/middle magnet schools scored a grade of A, one scored a grade of B, and one scored a grade of C (louisianabelieves.com). Other public schools within this same district all scored D’s and F’s with the exception of six elementary schools scoring a B or C (louisianabelieves.com). While magnet schools were designed to increase diversity many have lost that focus and instead have begun to limit access to transportation and increase enrollment standards as well as to use parent groups to actively recruit families, Olsen, Beal and Hendry (2012) argue in their study that:

parent involvement at South Boulevard in Baton Rouge, Louisiana, focused on competing with other schools, both public and private, for resources rather than on creating more access for a greater number of students.  
(Olsen, Beal and Hendry 2012, p. 543).

School choice centers around schools that can demonstrate a record of performance. Parents are willing to send children to public schools that are effective if those are available (Lincove, 2018). In a study of school choice in New Orleans, the school choice debate centered around parents wanting high-performing schools:

parents who opt out of the public system, or at least consider opting out, are doing so primarily to improve academic experiences for their children. There

is nothing about public schools, per se, to which these parents object, and they will choose high-performing public schools when available. (Lincove 2018, p. 222).

While there is abundant literature on school choice programs and parent decision making within these programs, there is less

research available to determine why parents initially choose private or independent education and what makes parents decide to leave independent schools. More research is needed to understand this aspect of school choice. This capstone study aims to better understand how one independent elementary school in Shreveport, Louisiana can increase retention after 88 years of operation.

## 04. Conceptual Framework

The National Association of Independent Schools (2017) recently conducted research for its member schools utilizing the jobs-to-be-done theory popularized by Clay Christensen in his 2007 book, *The Innovator's Dilemma*. The jobs-to-be-done theory relies on the idea that consumers “hire” or “fire” products or services to fulfill jobs they need done in their lives. A “job” is the problem a customer needs to solve in a specific context. NAIS conducted surveys and categorized data to create four main “jobs” that parents hire independent

schools to do. Figure 3, from the NAIS jobs-to-be-done research highlights the NAIS findings (NAIS, 2017).

To explain the jobs-to-be-done framework, Christensen (2007) provides the example of the milkshake. He explains that a researcher observing a fast-food restaurant was surprised to find that 40% of the milkshakes sold that day were sold in the morning. To better understand why, he asked consumers what milkshakes in the morning were doing to improve their lives and found that they were facing a boring com-

Figure 3: Why do families choose independent schools?

### Why Do Families Choose Independent Schools?



mute to work and wanted something quick and easy to consume that would sustain their hunger until lunch (Christensen, 2007). The milkshake does this breakfast-on-the-go job well, so it is often “hired.” When we apply the same framework to the Shreveport, Louisiana school market, we must consider what parents in the area need schools to do for their children. Why might a parent “hire” Southfield School for their child’s education and what causes parents to “fire” this school?

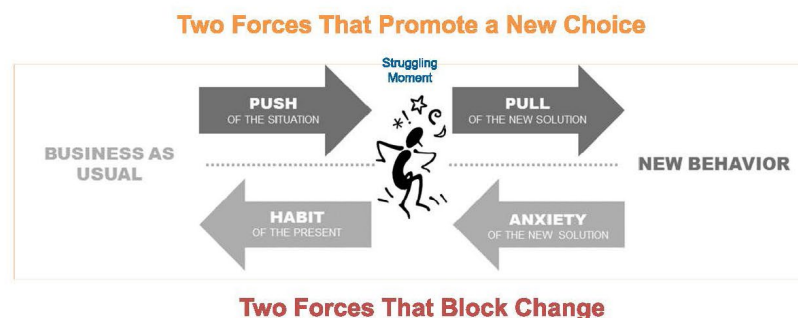
When parents are faced with a school choice decision, they should be considered consumers. As such, they are driven by forces that help them choose to hire a new service, fire an old service, or remain committed to an existing service, such as illustrated by Figure 4 below. Jobs-to-be-done utilizes the idea that a moment of struggle pushes or pulls a consumer to new behavior while habits and anxieties resist the change. For example, a parent may be unhappy with a school’s stance against student awards. They know that at XYZ school, students are given awards for many talents and achievements and they feel their child deserves these accolades. They feel pushed by the stance against awards while feeling pulled to a school that does give awards, possibly leading the family towards attrition or the “firing” of their current school. At the same time,

these same parents may worry that their child will not be as successful at the new school alongside the extremely talented children that they assume make up the student body. As well, parents may be familiar with the teachers at their existing school and comfortable with the family routines they have developed while attending it. The anxiety surrounding the new school and the entrenched habit of the current school are strong factors in the family retaining a business-as-usual plan to stick with the school they know.

Having reviewed the available literature, this study will examine choice as it pertains to the issue of retention and attrition at Southfield School. The question of school choice for private independent schools, private elementary independent schools, and private elementary co-ed independent schools can be understood by assessing how parents “hire” and “fire” schools based on personal values and the overall value of the education. The retention problems that exist at Southfield School are not uncommon and are proximal to the problem of practice, increased student attrition. Of equal interest to this study is the distal problem of understanding the forces and dynamics at play when parents are charged with making choices for their children.

Figure 4: The Jobs-to-Be-Done Method

### The Jobs-to-Be-Done Method



## 05. Research Questions

The problem of attrition at Southfield School provides a unique opportunity to test the jobs-to-be-done framework within an independent school context. While NAIS conducted research at the national level with this framework, exploring it within a specific context can provide better information for the school and possibly allow for a more tailored solution to this problem of practice.

As we look at why current parents chose the school and why past parents may have exited the school, we will use survey data to define the “jobs” that parents hire the school to do. Comparative data gathered from interviews and focus groups will be analyzed and compared to the four “jobs” developed by NAIS to better understand how or if Southfield provides these parents “a pull” towards this school for their child (NAIS, 2017). We will compare the “jobs” we find in our research to the national research from NAIS to understand if Southfield has similar jobs-to-be-done or if Southfield has a more unique set of “jobs” related to its context. Interviews

with parents who have exited the school will provide us with information about struggling moments that may have pushed them out of the school and help clarify “the pull” they felt towards another school solution. Finally, we will code qualitative data to better understand the “job” stories that parents share related to their child’s school choices.

By interviewing school employees and collecting school system data, we will be able to better understand the structure of the organization and determine if school systems are contributing to attrition rate issues. We intend to better understand the effect of neighboring schools and whether these schools may offer similarly appealing messaging to parents of the Southfield community. With the goal of capturing the jobs-to-be-done in this community and collecting stories from parents about the “jobs” they have hired the school to do alongside stories from the teachers about the “jobs” they think the school is doing, we hope to better understand the following research questions:

### Research Question



#1

**Why do parents choose this school?**

### Research Question

#2

**Why do parents choose to exit or leave this school?**

## 06. Data Collection

This inquiry employed a mixed methods approach to collecting data involving surveys, on-site parent and teacher focus groups, school observations, and on-site and remote interviews with school leadership. Administrative data was used from the school site including admissions' department exit data, marketing data, and student information data. The following explains how the data collection aligns with each research question.

### Why do parents choose this school?

To better understand the first research question of why parents choose a school, we administered surveys to all current parents of Southfield School (Appendix A). These surveys were delivered electronically to all 313 current parents in the school; 135 were completed for a 43% return rate. The school sent an email to current families asking for participation in the survey (Appendix H). The survey link, included in the school recruitment email, led respondents to a Survey Monkey survey that we administered. All survey results came directly to us, independent of the school. The survey (Appendix A) listed nine factors associated with school choice selection developed through current literature and discussions with admissions directors at other NAIS affiliated schools: financial, academic, curriculum, philosophy, parent decision, student decision, convenience, extra-curricular, relationships (Burgess et al., 2015; Markow, 2007). We asked parents to rank these nine factors from most important to least important in their decision to choose Southfield School for their child or children. Surveys also included an open-ended response section for additional comments. Of the 135 surveys completed by current parents, 38 current parents (28%) added additional comments to support their survey rankings.

On-site focus groups were used to further validate the survey and to help better understand the survey results (Appendix B). Two focus groups were conducted, at the school, and the focus groups included nine and 10 parents respectively. Focus groups were formed

by parents selected by the school and included parents from each division of the school to form a representative sample. The parents who participated in the focus groups self-identified as three Black/African American, 14 White, and two Asian. The 19 parent participants in the two focus groups represented 30 children in mixed grade levels from preschool through eighth-grade with 12 children in the primary division, two children in kindergarten, 10 children in first through fourth grades, and six children in fifth through eighth grades. Parent focus group demographic data can be found in Appendix C. While attention was paid to the formation of these groups to gather parents who were representative of the entire parent body of the school, the data collected in these focus groups may not reflect the overall feelings of the entire parent body. This is one possible limitation of our study.

The focus group discussions were recorded using the Otter app, open coded for analysis using MaxQDA software, categorized into themes based on the nine factors used in the survey (financial, academic, curriculum, philosophy, parent decision, student decision, convenience, extra-curricular, relationships) as well as the NAIS 2017 jobs-to-be-done findings, and analyzed for frequency of occurrence of themes and specific words or phrases. Some themes also emerged organically from the data that did not fit into the nine factors used in the survey or the NAIS findings. Focus group data also provided quotations from parents that aided in the development and support of research findings.

We asked focus groups about school choice decisions to provide additional context for survey results. For example, the survey had parents rank their reasons for choosing Southfield School, and the focus group was asked to provide a more open-ended response to the same question: “why did you choose Southfield School?” The data collection plan in Table 2 offers additional details about our methods for data collection around this question.

In addition to the above methods, we mapped the school from other elementary and middle schools in the area (Appendix G) using Google Maps to better understand the natural environment and neighboring community and determine exactly how many schools are located within a two-mile and a five-mile radius of the school. This idea emerged from literature which indicated that parents of all socio-economic groups prefer schools close to their homes (Burgess et al., 2015) and

that charter schools near private schools can decrease enrollment in private schools (Chakbarathi & Roy, 2010). We wondered if the magnet schools near Southfield might have an effect as well.

To examine the relationship of neighboring schools to Southfield, we documented the number of instances that the neighboring schools were brought up in our focus group conversations. As the parents in the focus groups are current parents who chose this school, their opinions on other nearby schools might help better understand the lure of other options. In our current parents’ survey, while we did not ask a particular question about neighboring schools, we did analyze open responses for the number of times other schools were mentioned as well as the context in which the schools were mentioned. We were interested in learning how often other schools were mentioned by both current and past parents without prompting.

**Table 2:** Data Collection Plan: Why do parents choose this school?

Data Collection Plan: Why Do Parents Choose Southfield School?				
Data Type	Operational Definition	Stratification Factors	Sampling Notes	Who and How
Qualitative Data	Parent comments about school satisfaction and initial reasons for choosing Southfield	Grade Level/ Demographics	Samples for focus groups were selected by the school. We asked the school to select parents that represent the school's population in respect to varied grade levels.	We held two focus groups with parents at the school in fall 2021.
Quantitative Ordinal Data	Current parent survey asks parents to rank nine factors related to school choice decisions	No demographic data was collected on our current parent surveys	All current families were sent an email by the Head of School requesting their participation in a survey using a link to a Survey Monkey online survey.	We collected the results from online surveys in fall 2021.



## Why do parents choose to exit or leave this school?

Surveys were also sent electronically to parents who had recently left the school to gather data explaining why parents leave a school they have begun mid-program (Appendix D). Mid-program is defined as leaving the school any time from enrollment through the culmination of the program in eighth-grade. The past parent survey matched the current parent survey asking parents to rank the same nine factors to answer the question: why did you leave Southfield School? We used the same nine factors in both surveys to assess the responses of the two groups for significant differences among rankings. We wanted to explore whether parents were choosing and leaving the school for similar reasons or choosing the school for one reason and leaving for another.

Past parents were also given the opportunity to add additional open response information. We requested that past parents provide the name of their child’s current school

and that they compare their child’s new school to Southfield by answering: in what way(s) does Southfield School outperform your new school? Capturing information about new schools allowed us to analyze the number of attrition group families that went to another local school versus those who have moved out of the city. The responses also gauged the past parents satisfaction with the new school in comparison with Southfield. We received 22 past parent survey responses. Of these 22 responses, only 3 declined to list their new school. Of the 22 past parent responses, 19 parents added open response comments regarding their survey rankings. Of the 22 past parent responses, 20 parents chose to answer the final question on the survey that asked them to compare their current school to Southfield. The data collection plan in Table 3 offers additional details about our methods for data collection around this question.

**Table 3:** Data Collection Plan: Why do parents choose to exit or leave this school?

Data Collection Plan: Why Do Parents Leave Southfield School?				
Data Type	Operational Definition	Stratification Factors	Sampling Notes	Who and How
Qualitative Data	Parents comments to the Admissions Director at time of exit: Why are you leaving? What school are you attending?	Grade Level/ Demographics	Sample all notes from the past two years- 10 years of data was requested but the school could only provide data for two years	Admissions Director provided exit interview information and admissions data
Quantitative Ordinal Data	Exited parent survey results	New school information provided by parents on survey	Sample all families who left Southfield in the past year	Exited parent surveys were emailed to past parents by the school (Appendix H: Recruitment Emails)
Qualitative Data	Parent comments about initial choice	New school information provided by parents on survey	Sample came from parents who added thoughts to the open response portion of the past parents survey	Survey Open Response by past parents

## What role does the school, as a system, play in retention or attrition?

The school is a system. It is impossible to separate the parts from the whole. Ackoff (1994) employs a car analogy to explain systems thinking by describing disassembling several cars to build one using only best pieces of each. The finished product will not run despite the quality of each of its unique components as its overall system has been compromised. Ackoff's example (1994) has been used by many to better understand systems thinking and provides an excellent framework which can be applied to understand the system of a school. As we look for reasons to explain attrition and retention, we must assess how the parts of the school are functioning to create or undermine its

When a school operates as an academic institution as well as a business, it is important to examine the financial levers as well. To compile school administrative data, we worked with the admissions director to collect data related to enrollment trends, family exit information (e.g. where the student plans to go and the reason given for exit), and available student information. Marketing data and financial expenditures related to marketing were gathered from the marketing director. The data collection plan in Table 4 offers additional details about our methods for data collection around this question.

A possible limitation of this study involves school records. The school has only recently employed an electronic system to collect admis-

**Table 4:** Data Collection Plan: What marketing measures exist at this school?

Data Collection Plan: Marketing Measures				
Data Type	Operational Definition	Stratification Factors	Sampling Notes	Who and How
Qualitative Data	Marketing Activities Descriptions	Targeted grade levels and divisions	Interview with Marketing Director	Marketing Data from school
Quantitative Ordinal Data	Dollars spent on marketing annually	Targeted grade levels and divisions	Marketing Director	Marketing Data from school

stability.

At Southfield School, the organizational divisions include preschool (two years to pre-K), lower school (kindergarten through fourth-grade), and middle school (fifth-grade through eighth-grade). Children transition to a new building at kindergarten, first-grade, and fifth-grade. For the purposes of this research, kindergarten will be treated separately from the lower school (first through fourth grades) to examine how divisional and structural organization may relate to possible exit points. In focus groups and interviews, we sought to understand the importance or lack of importance of transitions among both structural and organizational divisions in this school.

sions data, so little long term historical school administrative data was available for analysis. The current system also has some limitations. For example, when students are withdrawn, grade level data is removed so it is difficult to capture the grade level of the child at the time of exit.

In addition to gathering data from parents at the school, exited parents, and school administrative data, we also interviewed three school leaders—the head of school, admissions director, and marketing director (Appendix E). Their interviews were recorded and provided insight into leadership decisions, business office decisions, school mission, and goals. Teachers at the school were invited to participate in a focus group (Appendix F). This focus group session

**Table 5:** Data Collection Plan: What is the longevity and satisfaction of teachers at this school?

Data Collection Plan: Teacher Longevity				
Data Type	Operational Definition	Stratification Factors	Sampling Notes	Who and How
Qualitative Data	Teacher Focus Group Discussion	By division; by years taught; by years taught at this school	9 Southfield teachers	Focus group conducted at the school
Quantitative Ordinal Data	Dollars spent on marketing annually	By division; by years taught; by years taught at this school	All current Southfield teachers (average years of service)	HR Data

consisted of 8 female teachers. Using a demographic survey, we discovered that five had taught at the school for over 10 years, two had taught at the school for 7-10 years, and one declined to answer demographic information. In discussion, we learned that several had taught at the school for much longer than 10 years, more in the range of 20-30 years. Of the teachers who chose to participate, seven self-reported as White and one declined to report on race or ethnicity. The teachers discussed the school culture, satisfaction, and parent involvement. Teacher employment data was also analyzed to determine

mean teacher longevity as well as median teacher longevity as demonstrated in Table 5.

The structural and organizational data of the school was used to better understand the school as a system and to determine if contributing factors may exist within the school that relate to attrition or retention of families within the school community. If “every system is perfectly designed to get the results that it does” (attributed to multiple sources--D. Berwick, W. E. Deming, and P. Batalden), then an exploration of this school’s system could reveal an area of system redesign needed to reduce attrition rates.

## 07. Data Analysis

For data analysis, we began by looking at school enrollment trends and student attrition and retention rates. We then examined our survey data for factors that may be influencing family exit or attrition (past parents survey) and factors that may be influencing family retention and choice (current parents survey). We used independent samples t-tests to compare survey factors between the current parents at Southfield and the past parents. We also used

paired correlation tests to test associations between survey variables within each group (current parents and past parents).

Triangulating the data from our surveys and focus group data came next and we used a process of thematic analysis to further explore and validate many of our survey findings. Our process included open coding our focus group transcripts with MaxQDA software using the factors from our surveys as well as the NAIS jobs-to-be-done outcomes. We expected

that some of our coding would fit into these themes while other codes may emerge as part of the coding process.

Table 6 illustrates a sample of our codebook and highlights our decision making around coding our focus group data. The second column shows coding, as appropriate, using the nine survey factors as well as NAIS jobs-to-be-done indicators. The third column highlights our original open coding results, demonstrating some areas where themes emerged from the research.

Finally, we used school administrative data, such as HR data, student enrollment/exit data, and school marketing data when appropriate to back up findings that we initially derived from our research.



**Table 6:** Codebook Excerpt

FG	Themes	Code	Example
2	Academics	Rigor\academics	Yeah. So, when we moved here, we were looking for a school that was maybe not the norm for Louisiana, where if we were to move, we could be on par with top schools in other areas. In fact, this was the only school that met that criteria. It is the only school in Shreveport that is accredited by that standard level.
2	JTBD #1	school comparison\ academics\COVID	They have a great dyslexia program for years that was the only one in town, but we now have it, it launched during COVID. But Southfield now has a dyslexia program, and it is set up and ready. They haven't really advertised it as much because it started during COVID, but it is something that's available to our students now.
1	JTBD #2	rigor\expectations\ non-religious\academics	And it's important not because we don't believe in religion, but because we want our kids to be very open minded, but we also want them to get a really good education and more of a Montessori style setting, while not being behind the curve when it came to education and learning. So that was our biggest reason for choosing Southfield.
2	JTBD #4	Rigor\academics\ high school plan	She didn't have time to waste anymore, so anyways, all that said is that, for me, the why we chose this school is just accreditation and success rate.
2	Finances	expensive\magnet	Yeah, about three kids with this tuition is that education comparable to this. No. Is it good enough, it's just, it really is the financial thing is like, I mean, three, three kids. What's three kids tuition here, it's like a big chunk of change. Yeah, versus free, what is the trade off...
1	Convenience	Community\neighborhood	when you move around, you just can't, not consider that and as much as I'd love to send them to a cute neighborhood school, you know, down the street from the house...that's not even an option anymore.
2	JTBD #3	diversity	I think my daughter got a lot out of that, you know, okay, we embrace the diversity, the different cultures and the people from all different walks of life here versus what I've seen in other schools where they don't so much if you don't fit into a certain category or person and they kind of push you aside.
2	Parent Desire	School comparison	Based on this, we know that they're given a system that all public schools live in and so I think that's why we, I choose a private school. I'm like, okay, that's fine that system can exist, but guess what, we don't have to participate.
1	Relationships	Community	All the teachers know all the kids whether it was your teacher or not, you know, they call them all by name, the library or the music teacher or the art teachers...so it really is a family, it really is a community.
2	Student Desire	independence\ student choice	And honestly, I did show my daughter two schools I was okay with, and she liked the cafeteria and no uniforms.

# 08. Key Findings

## Research Question #1: Why do parents choose Southfield School?

### Finding #1

***Parents choose Southfield primarily for academic reasons.***

When we asked the research question, Why do parents choose Southfield School? overwhelmingly the data indicated that parents choose Southfield School for high quality academics. As demonstrated in the lowest mathematical means in Table 7 (which in our survey indicate highest importance), current parents, or the parents who have stayed at Southfield,

responded that academics were the most important reason for staying at the school or choosing the school.

Further, as illustrated in Table 8, there is a significant difference between the value parents who stay and parents who leave place on academics.

The differing values of importance that are found in the data is particularly compelling

**Table 7:** Descriptive Statistics

	Parent Status	N	Mean	Std. Deviation
Financial	Current Parents	133	7.80	1.890
	Past Parents	19	3.63	3.386
Convenience	Current Parents	134	6.38	2.040
	Past Parents	20	4.45	3.203
Academic	Current Parents	134	2.13	1.653
	Past Parents	17	4.35	2.473
Curriculum	Current Parents	134	3.05	1.660
	Past Parents	17	4.59	2.033
Extracurricular	Current Parents	134	6.24	1.924
	Past Parents	16	5.50	.966
Philosophy	Current Parents	134	5.09	2.451
	Past Parents	16	4.94	2.205
Relationships	Current Parents	134	4.96	1.915
	Past Parents	16	5.75	1.915
Student Preference	Current Parents	134	4.93	2.366
	Past Parents	16	6.44	2.828
Parent Preference	Current Parents	135	4.39	2.112
	Past Parents	16	4.31	3.114

**Table 8:** Differences between parents who stay and go

	t-value	p-value
Financial	7.989	.000
Convenience	3.629	.000
Academic	-4.897	.000
Curriculum	-3.501	.001
Extracurricular	1.510	.133
Philosophy	.237	.813
Relationships	-1.569	.119
Student Preference	-2.354	.020
Parent Preference	.123	.902

networks to determine school quality (Bosetti, 2004; Holme, 2002; Olsen Beal & Hendry, 2012; Phillips, 2012; Raveaud & Van Zanten, 2007). Another parent spoke to the investment in academics for her child:

My child has not struggled academically like some of the public-school children I know. I feel confident that the school is. . . ensuring that my child excels academically. It is costly to send my child to school here but I would do anything necessary to keep him in a thriving academic, hands-on school.  
(Current parent survey, open response)

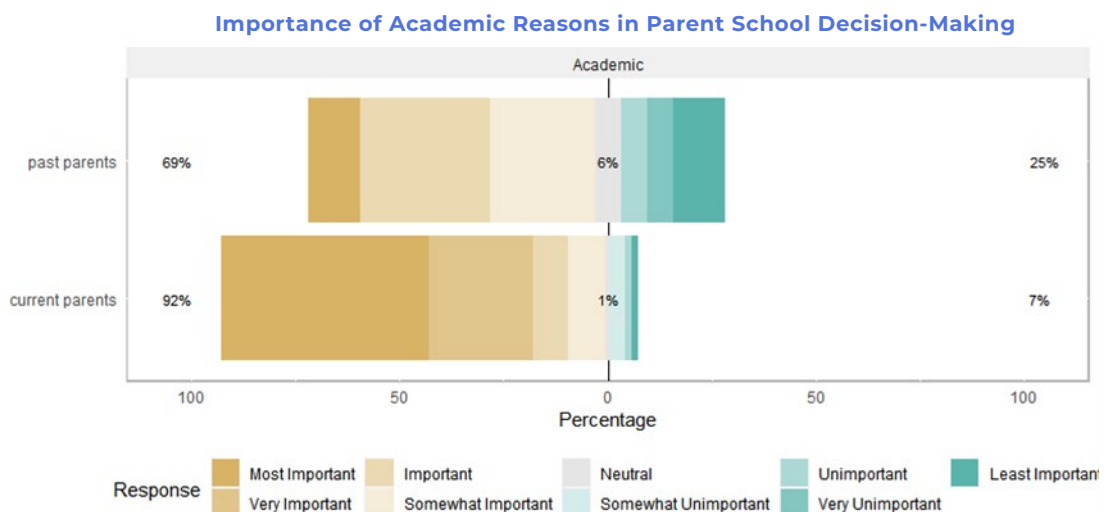
when visually displayed in Figure 5. Both parent groups valued academics in their decisions about school, but parents choose Southfield for academics to a larger extent than parents leave based on academic reasons. Fifty percent of the 135 current parents indicate that academics are the most important reason for being at Southfield while only 12% of past parents felt that academics were the most important reason for leaving Southfield. Statistical data supports that parents choose Southfield due to academic reasons.

Both focus groups and open-ended survey responses also support the importance of academics for choosing Southfield. One parent said, “I heard from a high school teacher that all the Southfield students that come to their school are the most prepared students, they are ready, they know their stuff” (Parent, focus group 1). This quote highlights the reputation of the school with parents. As documented in literature, parents rely heavily on their

This parent compares her child to “public school children I know” highlighting a public school system that has two dimensions- magnet schools that score high on the Louisiana Department of Education annual report cards and schools that are rated as academically poor (louisianabelieves.com, 2022). This state data does suggest that many public school students in Shreveport are academically struggling. State data does not include evidence of the academic strength of non-public schools but parents in our findings relied on accreditation from the National Association of Independent Schools (NAIS) as an indicator of Southfield’s academic success. One parent said:

when we moved here, we were looking for a school that was maybe not the norm for Louisiana, where if we were to move, we could be on par with top schools in other areas. In fact, this was

**Figure 5:** Likert graph of survey data from current parents and past parents



the only school that met that criteria. It is the only school in Shreveport that is accredited by that standard level. (Parent, focus group 2)

Other parents shared similar feelings that national accreditation was an indicator to them that the school was academically successful.

Beyond accreditation as a symbol of high quality academics, parents shared satisfaction and alignment with the academic mission of Southfield. One parent suggested that the school's mission of "a lifelong love of learning," was meaningful to her (Southfield 2017). She said,

I love their logo, a lifelong love of learning, and from day one with my children...I just want you to want to pick up a book when you're 45 and read it and go back to school. If you want to get your doctorate, like, I want you to fall in love with expanding your thoughts in your brain and so this school-that's part of their mantra, what they do. (Parent, focus group 2).

While this parent talks about the "logo", she is referring to a well-known shorthand of the mission statement. The school's full mission statement reads:

At Southfield, our talented and experienced faculty cultivate curiosity, character, kindness and a lifelong love of learning. Our secure environment surrounds the whole child on a journey through a challenging curriculum that results in exceptional young scholars with self-confidence and integrity. (www.southfield-school.org).

The phrase "lifelong learning" is often used among independent school mission statements (Boerema, 2006), and Southfield has embraced the idea for its school. In interviews with three administrators, all focus group discussions, and a tour of the school, each time, this phrase was mentioned. The repetition of the mission statement in full or condensed form seems to indicate its importance to many parents.

In our conceptual framework, the exploration of push and pull factors that block or create change (Figure 4) can help us understand school decision making by parents.

Using this conceptual framework with our research, we understand that academics are a factor that pulls parents toward Southfield initially and prevents current parents from wanting to change schools. Parents report choosing Southfield for academic reasons and staying at Southfield due to academic reasons at a higher percentage rate than parents report leaving Southfield over academic concerns. A comparison of our findings to the NAIS 2017 jobs-to-be-done research (Figure 3) that originally inspired our project shows commonalities between the themes introduced by parents and teachers Southfield School and national data.

Our research indicated that many parents at Southfield School hire the institution for the "job" of overcoming academic obstacles. A current grandparent said:

I visited with my daughter who was looking for a school appropriate for her dyslexic daughter. The Admissions Director met us with enthusiasm and knowledge and my daughter and I were so impressed by the friendliness and openness of all the staff we met. We had two more schools to tour later in the day but because of the face of the school we were totally sold. It met all the requirements my daughter was looking for. She had two other children that she placed there as a convenience and they have had 1 1/2 years of phenomenal schooling. (Current parent survey, open response)

Another parent said:

Our son was in public school and we were getting a lot of push back on getting him a 504 and accommodations. We chose Southfield because of the small classes, the philosophy, the extra help academically as well as the rigorous curriculum. (Current parent survey, open response)

These two quotes show how Southfield was hired by these families to help overcome academic obstacles that they had encountered in other schools.

The NAIS (2017) job related to helping my gifted child realize a plan for the future was unexpectedly present in our research. Parents in our survey did report that they are already focused on their children's adult successes.

One parent was really worried about the future of his child growing up in Shreveport. He shared:

This was the only school that was actually nationally accredited that met the same learning benchmarks as a school we were at in Savannah, Georgia, that I knew when she was 40, so, maybe I was thinking a little too far down the road, but that she would be getting the same quality of education that students in Savannah, Georgia and Charlotte, North Carolina and New York and Dallas, Texas.

(Parent, focus group 2)

This parent *hired* Southfield to ensure that

his child was getting a strong academic education comparable to schools in other cities and states around the United States.

### Curriculum

Curriculum was a tricky factor in our study as survey results indicated that past parents' and current parents' opinions were significantly different regarding curriculum. Current parents stated that curricular reasons were another very important reason for staying at Southfield while past parents found curriculum to be more neutral. It was not clear from our research that parents separated academics and curriculum in their opinions. We learned that our survey design might have led to some confusion with word choice among some of the parents.

## Finding #2

*Strong faculty increases student retention.*

When we asked, what makes parents choose Southfield or stay at Southfield?, we found that strong faculty was important to parents. Parent focus group discussions and survey open responses provide evidence that parents feel like teachers know their children and are dedicated to the school. One parent shared,

My child is in kindergarten, and I was blown away when a middle school teacher said Hi to her. They're in two separate buildings that seemingly would never interact, but there's a vested interest already knowing that potentially this will be one of my students one day"

(Parent, focus group 2)

Parents report that the teachers go beyond expectations in caring for children. Further, parents indicate that tradition and teacher longevity are valuable to them, "my friend who graduated 15 years ago can talk to my five year old about the songs Miss Davis sings, or just a variety of things that make it feel like a cyclical community" (Parent, focus group 2). When parent alumni see the teachers they had as students continue to teach at the school or parents who are not alumni hear about teachers who have been at the school for twenty years or more, they see stability, commitment, and strength from the teaching staff. This, in turn, helps them to feel confident in their decision. One current parent explicitly said, "The faculty are an important reason why I choose to stay. They treat each child as an individual and foster a sense of security and encouragement" (Current parent survey, open response).



Faculty communication with parents was an important highlight in our focus group discussions and survey open-responses. As one example, a parent shared,

What I find to be one of the biggest strengths is when I need to talk to someone, they're very responsive, the teachers, they will call you, they will text you, they will email you...I think those are things that you may not find in a larger public school.  
(Parent, focus group 1)

Willingness, from the teachers, to communicate well and often with parents was echoed throughout our discussions with parents. The current parents reported that they value their teachers' willingness to communicate.

While it was not surprising that current parents dote on the teachers, it was unexpected to see many past parents who still praise Southfield's teachers. These past parents provide further evidence that the teachers at Southfield are strong. One past parent shared a response to an open-ended survey question that asked, In what ways does Southfield School outperform your new school?,

"Every way. Student, teacher and parent interactions, curriculum, teacher involvement and caring" (Past parent survey, open response 4) while another past parent said, "I had a much better relationship with the staff and teachers at Southfield. Southfield has a much more open and welcoming environment than public schools" (Past parent survey, open response 4). Thirteen of the twenty-two past parents (60%) who responded to our survey indicate that Southfield outperforms their new school in at least one way, with eight (30%) specifically referring to teachers.

Positive comments about Southfield's faculty occurred in the past parent survey open responses, current parent survey open responses, parent focus groups, teacher focus groups, and leadership interviews causing us to believe that the strong faculty are a pull factor toward Southfield when parents make an initial choice to attend and a factor that blocks parents from wanting to make a change in their child's school, when looking to our conceptual framework (Figure 4). Habit is seen in our model as a positive element. Satisfied parents keep children enrolled and engaged at Southfield due to the strong faculty supporting these students.

## Finding #3

### *Parents want to belong in the community.*

When we asked, Why do parents choose Southfield?, we found that parents want to belong in the community and when they do feel that they belong, they stay.

Focus group data notes a high frequency of occurrence of the theme of community in discussions. These occurrences represent many forms of relationships within the community such as teacher-to-student, teacher-to-family, family-to-family, and student-to-student relationships. One parent who participated in the focus groups said:

We have a very different [background]

and we move around, we also move around in the United States so we have experienced different regions of education and different regions of culture, so when I was looking for school for my kids, I will like the place to make sure that they will accept all kinds of opportunity or a different kind of thinking or thought or in that community.  
(Parent, focus group 1)

The theme of diversity came up several times with several families expressing the desire to increase diversity at the school. One parent

shared that the lack of diversity was something they had to overcome in choosing Southfield while another family expressed hope that increased scholarship funds may increase diversity at the school. Other families reiterated the welcoming and open environment,

Ever since we toured this school, it just felt like home; on the staff, just everyone, is just, just friendly and amazing and actually interested in who you are and where you come from and why are you here and I just feel safe here.  
(Parent, focus group 2)

One parent shared her perspective of the Southfield community as a teacher, parent, and wife of an alum:

So I taught here for four or five years. My husband went all the way through, his brothers went all the way through, and his dad was here. And I was told I needed to see it. I taught at a school in Fort Worth, for two years before this, and I was told when we got engaged, I needed to come up to Southfield and meet the headmaster, and associate headmaster and so I did that, and I walked on campus, and it was just, it was like our own little Disney World right here, like just love everywhere from teachers and from parents.  
(Parent, focus group 2)

Each of these parents centered themselves in these quotes—I want a school that accepts all kinds, I just feel safe here, I taught here. As found in literature, parents seemed to place an emphasis on their own identity through school selections for their children (Cucchiara, 2014).

In our focus group discussions, several parents expressed the word tradition to define Southfield. One parent shared,

It's a tradition thing. . . there's a lot of parents that went here that want their children to go here. Shreveport is a small, tight knit community, and a lot of people have gone to college and then returned back to the community. . . have been here the majority of their lives. And if they went to Southfield, they want their children to go to Southfield and Southfield is still carrying on some of the same things they did as students,

to this day, like the monthly flag celebration or the annual pumpkin shine.  
(Parent, focus group 1).

While focus group data indicates parents were very interested in the community and their relationships with other families and the relationships among the staff and students at the school, survey data show “relationships” as a much less important factor for staying or leaving. The choice to use the word relationships on our survey, rather than community, likely played a role in less significance on the surveys. Possibly, parents felt many factors contributed to their decisions and survey data was a reflection of the divided interests parents feel when making school choice decisions. The difference in formats (surveys versus focus groups) may have also affected the findings as well. In focus groups, stronger voices may be louder in the group or the group may focus naturally coalesce around one theme in conversation. Regardless of these possible limitations, in our research, it was clear that belonging to the community was an important theme in our focus group and open-ended survey data.

NAIS 2017 jobs-to-be-done research (Figure 3) says that parents hire a school to “fulfill my child’s potential in a values-aligned community” (NAIS, 2017). Our research at Southfield provided several examples that connect to this theme. In both focus group discussions and survey open-responses, parents shared that they valued that the school was a non-religious community. One parent said, “Southfield came up as one that was not tied to a religion, which was important to me. And it’s important not because we don’t believe in religion, but because we want our kids to be very open minded, but we also want them to get a really good education” (Parent, focus group 1). A parent shared on the survey, “We chose Southfield because of the quality academics. We also like that this school is not associated with any religious organization” (Current parent survey, open response). Parents report hiring Southfield because it aligns with their feelings that school should be focused on learning over religion.

Our research also encountered evidence of the NAIS (2017) job of hiring the school to help develop a well-rounded person who could impact the world. In our focus group discussions, themes of confidence and acceptance were found. One parent shared regard-

ing her child’s confidence:

I mean, it can be small things like my son prayed at a basketball game. I mean, like if they ask for volunteers, they’re bold and they’re ready, they’re not afraid. . . I think Southfield instills the confidence that they can get up and do things, you know in front of people, because they have to present things all the time.  
(Parent, focus group 1)

Another parent shared, “My son was an especially shy child, and he is far more outgoing after being here at Southfield for several years” (Parent, focus group 1). Acceptance of others and developing an understanding of different cultures and people was found in our research. One parent discussed “the different cultures and the people from all different walks of life here versus what I’ve seen in other schools, where if you don’t fit into a certain category or person, they kind of push you aside” (Parent, focus group 2). While another parent shared that she appreciates Southfield as a school with a desire to become a more diverse school, “I would say not only race part, but like how they are open to every kind of people and people from everywhere” (Parent, focus group 1).

Looking to the forces that block or promote change (Figure 4), parents report in our research that they chose Southfield, or were pulled toward Southfield, due to their preference for a school without a religious affiliation and the desire for their child to be a confident

global citizen. Evidence of these pull factors can be found in focus group discussions as well as survey open responses.

“Southfield does not operate like other places, they do make you feel like family...it really is a family, it really is a community, and once you get locked in, it’s really hard to leave” (Parent, focus group 1). This parent shares that Southfield is a hard school to leave, but some parents who have left expressed just the opposite when asked about belonging in the Southfield community, so we turn to our second research question, *Why do parents choose to leave Southfield School?*

While no past parents indicated that relationships were central to their decision to leave Southfield, several shared, in survey open-responses, frustration with the community that contributed to their reasons for leaving. One parent said, “The school seems to service three to four families’ desires only. Also, when board members repeatedly come from the same family, I think there is a problem” (Past Parent Survey, Open Response 1). Another past parent indicated “bullying, snobbery, lack of religion, lack of problems being addressed when presented” as reasons for leaving (Past Parent Survey, Open Response 1). Hearing from past parents who left, partially in response to feeling like they do not belong in the community, is important information for the school to consider as they strive to retain current families and welcome new families. Our research helped to identify three additional findings to answer the question, *why do parents leave Southfield School?*

“

Southfield does not operate like other places, they do make you feel like family...it really is a family, it really is a community, and once you get locked in, it’s really hard to leave.

”

## Research Question #2: Why do parents choose to exit or leave Southfield School?

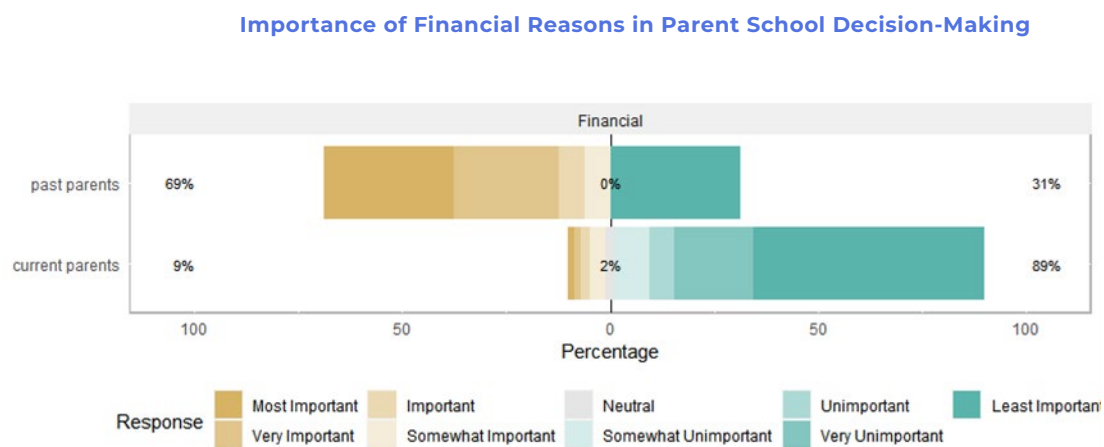
### Finding #4

*Finances, and a competitive free option, drive student attrition at Southfield.*

When we asked our second research question, Why do parents choose to leave Southfield School?, we found that finances and a competitive free school option were critical drivers of attrition. T-test results indicated that there was a significant difference in the way past parents and current parents responded to this factor (Table 8). Past parents, according to survey data, say that cost was a main factor in why they left. As illustrated in Figure 6, 69% of past parents indicate that finances were important reasons for leaving compared to only 31% of past parents who said finances were not important. This is a striking difference in comparison to the importance of financial reasons among current parents, according to survey results.

Past parents indicate that finances were an important factor in their decision to leave Southfield School, and of the past parents who responded to our survey, 36% chose public schools in the Shreveport area after leaving Southfield. Including those that moved to a school in another state but attended public school, 55% chose public school education after leaving Southfield. This clearly indicates that parents were looking for a less expensive option for their child's education. Of the parents on our survey who chose public schools in Shreveport as their next school, 75% went to magnet schools.

Figure 6: Likert graph of survey data from current parents and past parents



**Magnet Schools**

Financially, the pull of the magnet schools is intense in the Shreveport community. One past parent shared, “We got into a magnet school for kindergarten and our income was impacted by COVID” (Past parent survey, open response). Other past parents whose children now attend a magnet school in the Shreveport area said finances were the only reason for leaving. One past parent who listed finances as the most important reason for leaving on the survey, added to the open response section, “we really had no issues with Southfield at all, we really loved it. We had an opportunity to move our kids to a public magnet school that is consistently ranked the #1 elementary school in the state and so we did” (Past parent survey, open response 1).

Data suggests that the magnet school threat exists among current Southfield parents. One current parent shared, “we have one starting kinder next year and are testing her for magnet due to cost. If it weren’t for cost we would keep all three of ours at Southfield” (Current parent survey, open response) while a parent in a focus group shared, “we’re making a decision this year, I mean. Next month is when you, I guess, apply to test for magnet, and we have a daughter in PS4 and a daughter in PS2 and a third who will be here next year at PS2, and so yeah it is a financial decision for us” (Parent, focus group 2). A school employee shared in the affordability dilemma stating that her family had considered changing to a magnet school, due to cost, before she was hired to work at Southfield. Her employment was the reason her family stayed at the school (Leadership interview 3).

Current parents who are looking at magnet schools in the area demonstrate a challenge for the school to showcase why Southfield is better than free competitors. If families believe the free alternative is “good enough,” it may be increasingly more difficult to keep them paying a tuition for their children’s schooling. A current parent suggested this trend will continue, “There is usually some expectation that some will test for magnet and leave, and that is one of our gaps here” (Parent, focus group 2).

**Financial Factors and Student Desire**

A strong negative correlation between financial factors and student desire is noted in Table 9. It seems that if past parents valued finances, they did not place as much emphasis on student desire and if they valued student desire, they did not value financial factors. One scenario in which value judgements such as these could be made for past parents is if a child did not feel a strong desire to remain at Southfield, the expenditure for tuition would no longer seem worth it—particularly combined with the pull of a strong free magnet school in proximity. In another situation which demonstrated similar value judgements, if money precluded a family from staying at Southfield, the parents may no longer state they value their child’s desire to stay at the school over their financial health.

Returning to our conceptual framework (Figure 4), finances seem to be a strong push factor for families who have left Southfield while current families suggest that finances are not an important consideration. There may be some indication from focus group discus-

**Table 9:** Financial factor correlated with other survey factors for past parent group

**Paired Samples Correlations**

		N	Correlation	Significance Two-Sided p
Pair 1	Financial & Convenience	17	.269	.296
Pair 2	Financial & Academic	17	-.262	.309
Pair 3	Financial & Curriculum	17	-.148	.571
Pair 4	Financial & Extracurricular	16	-.010	.971
Pair 5	Financial & Philosophy	16	-.042	.876
Pair 6	Financial & Relationships	16	-.027	.921
Pair 7	Financial & Studentdesire	16	-.738	.001
Pair 8	Financial & Parentdesire	16	-.251	.349

sions and open-ended survey remarks that current parents care more about finances than is registered by the survey rankings. The cost of the school is juxtaposed with a demonstrably attractive free option in the same area which complicates the financial reasons for leaving the school.

For these reasons, financial considerations, overall, indicate a push factor away from the school and must be noted as a cause of parental attrition.



**“If it weren’t for cost, we would keep all three of ours at Southfield.”** --Current Parent

## Finding #5

*Family relocation affects Southfield’s student attrition rate.*

When we asked, *Why do parents leave Southfield?*, we found that many families simply move away from Shreveport each year. Survey results show that 5 of the 22 past parents, or 23%, who responded to our survey indicated that they had moved away from Shreveport. Using school administrative data, 43% of students who had withdrawn in 2020 and 2021 cited relocation away from Shreveport as the reason for leaving on school exit data and of those families that moved, 13% were military families.

This is not surprising. With a military base nearby, and a tuition scholarship for military families, Southfield tries to attract military families and regularly loses them. The question is, has this changed? The school shared that in 2019-20, there were 15 students withdrawn for out of town moves. In 2020-21, there were 32 students with out of town moves, or an increase of 113%. In 2021-22, there were 27 out of town moves (52% of withdrawn students). This school data indicates that students moving out of town is a continuing problem. This is consistent with the decrease in population in the city of Shreveport from 2010-2020 ([www.census.gov](http://www.census.gov)).

The mean of past parents’ response to convenience is 4.45 while the mean of current parents’ response to convenience is

6.38, a significant difference as Table 7 shows. The higher mean equals lower importance. This is deceiving because it leads you to believe that past parents felt the school was less convenient than current parents. When disaggregating the data, there are six past parents who marked convenience as the most important factor for leaving. Of the six past parents who marked convenience as the most important reason for leaving, four families moved out of Shreveport, one did not offer any additional information, and one answered that transportation was inconvenient. Another past parent, who offered that they had moved, marked convenience as the least important reason for leaving Southfield, but marked all other fields “NA.” In the open response section, all five of these parents who had moved indicated that their move was the main reason for leaving Southfield. While the survey may have been designed in a way that parents who had moved did not know how to answer, the five who responded to our survey all chose “convenience” as a proxy for moving.

Still, due to the open response area, families moving out of the city or state indicated that they left with positive views of the school. Of the five past parents who responded to the survey and moved, all responses were positive towards Southfield. One said, “Loved the school. My family relocated” (Past parent survey, open response 1) while another said, “We left Southfield, only because we have moved out of state”

(Past parent survey, open response 1). A third said, "Moved out of town. We LOVED Southfield!" When asked, *In what ways does Southfield School outperform your new school?*, parents who have moved said, "All ways!" and "Southfield had more of a personal touch, a family atmosphere. It was so great for our little ones!" (Past parent survey, open response 4).

Family relocation happens. Population decline in Shreveport was notable on the 2020 US Census ([uscensus.gov](https://www.uscensus.gov)). It is outside the scope of our research to determine specifically why families moved away from Shreveport, but we accept that there is a general pull of op-

portunities away from Shreveport for some of Southfield's families. We also know, from our research, that Southfield incentivizes military families to enroll and that military families are among those that were listed as moving on school exit data. The push of the military to other locations is inevitable. These push and pull factors, as associated with our conceptual framework (Figure 4) are important considerations as the school continues to plan for future enrollment needs.

**2021-2022 School Year**

**27 students relocated**

**2020-2021 School Year**

**32 students relocated**

**2019-2020 School Year**

**15 students relocated**

## Finding #6

***Leadership changes have increased Southfield's student attrition.***

When we asked, *Why do parents choose to leave Southfield School?*, we found that leadership changes increase attrition. Past parents offered negative views of school leadership and climate. A past parent shared a largely critical view of the leadership of the school in their survey:

Southfield School has lost its way. Sadly, they don't know who they are... Southfield does not have religion at its foundation but has always had spirit and pride in school and nation. The recent backing away from things like the Pledge of Allegiance is against the history and everything that Southfield

stands for, it embarrasses me to know that the head of school is buckling under the pressure and misguiding children. He is not using this time in history to teach students to be proud of being Americans and also pride in their school. Also, teaching them that if they do not agree they are allowed to voice that opinion. That is the exact thing the flag stands for. He [Head of School] is promoting his personal agenda and he will play a part in the destruction of Southfield School, if he hasn't already.

(Past parent survey, open response 1)

This parent chose to leave the school due to a misalignment with school leadership. Separate-

ly, this may be one frustrated parent sharing his or her story, but when triangulated with other data, it suggests a larger concern over leadership at the time of the survey. Another past parent shared that his child's new school has "academic rigor, less drama, more leadership." (Past parent survey, open response 1). While there may be some reason to believe that past parents would be more critical of school leadership, there were similar concerns among current parents. A current parent shared:

The decision to stay at school has been increasingly difficult over the past two years with the philosophical changes from new administration. We are sad to see so many people leave the school. Other area schools offer just as good of education, but we will stay if our child chooses to do so.  
(Current parent survey, open response)

This parent was not alone in the assessment of the school's administration at the time of the survey. Another current parent shared:

I feel like the school has lost the warm, inviting atmosphere that was ever present with the previous administration. This major problem is unrelated to COVID. We need that feeling back again. If you fix that problem, all others will fall into place. Change has to come from the very top.  
(Current parent survey, open response)

Perhaps timing led to increased frustrations. The new leadership at Southfield began in 2019 directly before the start of the pandemic. COVID-19 has tested school leadership globally and Southfield is no exception. While feeling that logistics were handled well, one parent expressed some disappointment,

But COVID, I will say, and this has nothing to do with Southfield itself, but it has taken some of our culture away, you know, I miss speaking to friends in the parking lot and walking my kids up to class and talking to the teachers and, you know, just that friendly family bond that we all had. I mean the school can't do anything about it, you know the pandemic that we're in, but it

really has taken some of our, a little bit of our culture away, you know, when we are not allowed to come on campus.

(Past parent survey, open response 1)

While the COVID situation undoubtedly made leadership more challenging, parent frustrations around leadership changes were clear in our survey open-response data, both past parents and current parents, as well as the teacher focus group.

Past and current parents report that leadership changes have been unsettling. Our conceptual framework highlights the choice to stay or leave when faced with a struggling moment. When leadership is the struggling moment, some of Southfield's parents felt pushed to make a change to another school while some stayed but shared anxieties around this issue that could lead to these parents feeling pulled towards another school. When looking at the NAIS (2017) jobs-to-be-done research, parents hire a school that aligns with their values. At Southfield, some parents suggest that the leadership, at the time of the survey, no longer aligned with their values and led them to make a change to another school.

Simply put, data suggests parents choose Southfield School for academics and leave the school over finances or family relocation. Focus group and survey open response data emphasizes community, faculty/leadership, and other schools as the most important considerations in choosing Southfield or leaving Southfield. External factors such as location of the school within a city and location of the school in relation to other schools play a role in understanding this schools' student attrition and retention rate as well as understanding parents' decision making around school.

The NAIS jobs-to-be-done research allows for further connections to be considered that help delineate the push and pull factors associated with parents' decisions about choosing an independent school. Costs are the most likely push factor while community and relationships along with teacher strength and longevity are important pull factors.

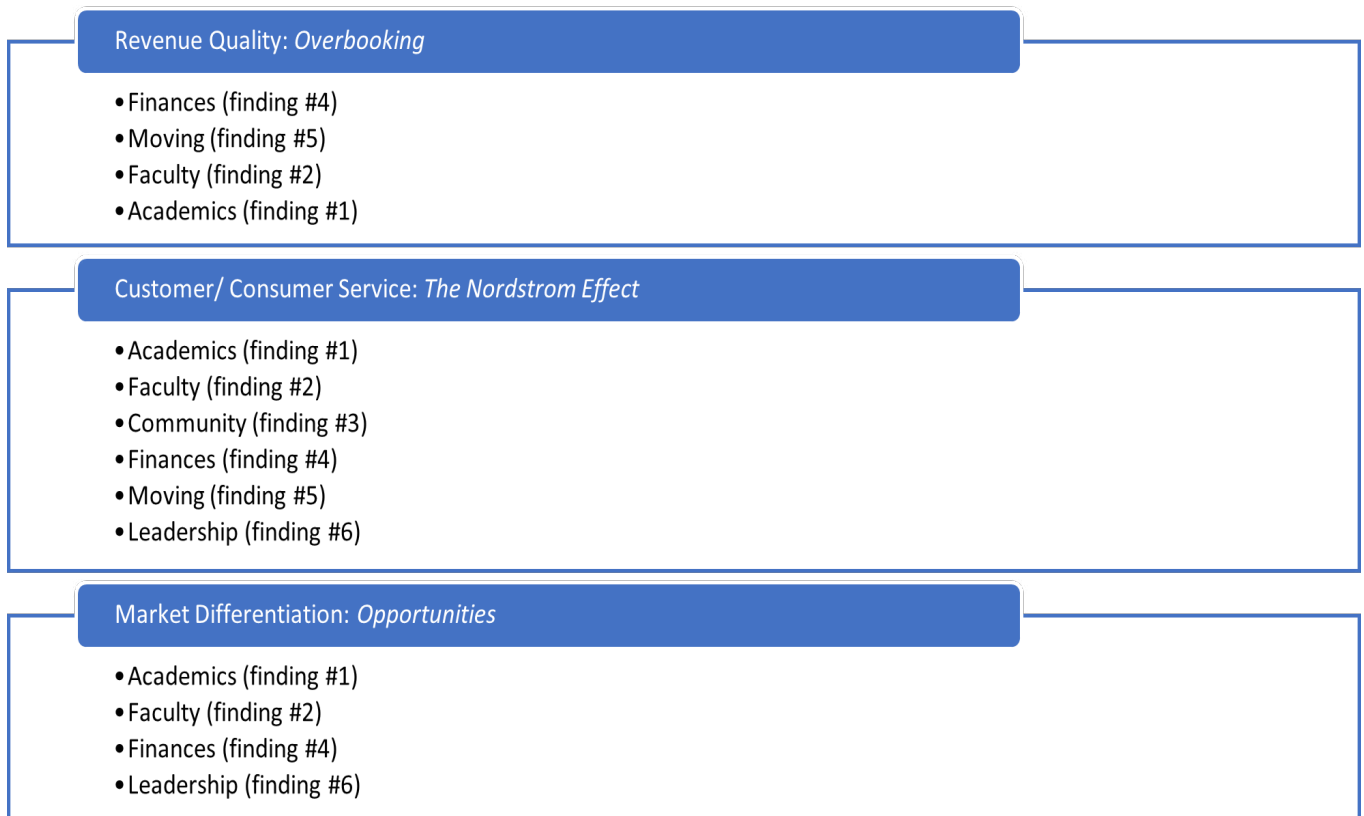
Answering our two primary research questions of why families choose Southfield and why families leave Southfield have led us to frame our recommendations around the central premise of how a tuition-based school can compete with the free schools which surround it.



# 09. How to Solve Recommendations

After thorough and comprehensive analysis of the data collected, the recommendations for Southfield School, generally, fall under one of three categories and are aligned with the specific findings as noted in Figure 7.

**Figure 7:** Recommendations and associated findings



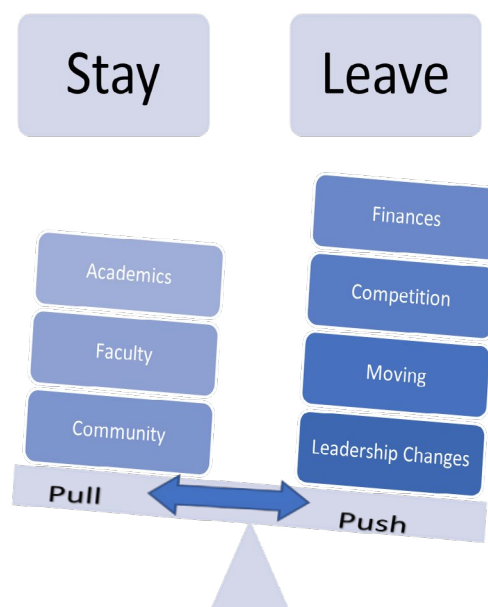
Before expounding on each of the recommendations and the related categories, it would be useful to describe and reiterate some of the critical factors associated with the Southfield School's problem of practice. As one of several private schools in Shreveport, Louisiana, Southfield School is experiencing competition for enrollment from the nearby magnet schools. One competitive magnet school is in the same neighborhood as Southfield. The two schools are equal in terms of quality (i.e. market parity) but one operates without the associated expense of annual tuition. As such, we offer these recommendations as a way to not only differentiate Southfield School in the marketplace but to gain market and product superiority thus giving Southfield School a sustainable competitive advantage (SCA).

With such a SCA, Southfield will then be able to defend its market share and institutional brand. In today's competitive and saturated landscape, Southfield School has earned the reputation of an esteemed independent school but with mounting pressure from new entrants in the marketplace as well as a declining population it is becoming increasingly difficult for Southfield to compete with the free services provided by competitors. Therefore, the underlying philosophy of the recommendations is that a premium or luxury product should have a proportional premium experience.

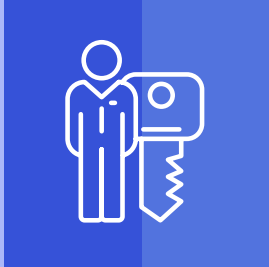
### Recommendation #1: Revenue Quality

In the current financial climate, Southfield School is operating at a loss and like many organizations, every penny counts. In the retail industry, organizations measure revenue per linear inch for items on shelves. Similarly, independent schools should consider revenue per square foot. With approximately 12 students waitlisted annually, we see an opportunity to enroll those children with the potential additional income of approximately \$150,000.00. This strategy of overbooking attempts to recognize that families will leave. As noted in finding #4 (Finances and a competitive market drive attrition) and finding #5 (Mobility leads to student attrition), the school has no choice but to plan for families to leave. High quality academics (finding #1), strong faculty (finding #2), and a loving community (finding #3) all suggest pull factors towards Southfield, but when compared to the push factors of finances and a competitive free option (finding #4), moving out of town (finding #5), and leadership changes (finding #6), the hypothetical scale inevitably tips for some families away from Southfield. Figure 8 illustrates that Southfield must embrace movement as part of their current situation.

Figure 8: Push and pull factors affecting decisions to stay or leave the school



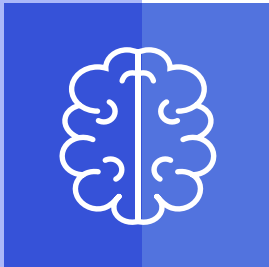
If the school recognizes that families will leave, it must make a plan to fill those seats. Rather than wait for families to leave, we recommend that the school overbooks. The preschool has a waitlist due to ratio constraints and may need more flexibility in enrollment management strategies. While it may seem impossible to change ratios, the school should consider the feasibility of the following:



Exploit and maximize the scarcity of preschool programs in the area by adding numbers to compensate for known future departures. With high-quality academics (finding #1), Southfield enjoys success in educating students and could use the already proven model to expand in this area.



Examine the layout of the school/classrooms to better maximize the demand in the p2-SK sections (overbooking) in anticipation for reductions in grades 1 and 2. Could additional spaces be used to accommodate additional classes at each grade level for the purpose of overbooking? Could classrooms and layout be more flexible to ebb and flow with the enrollment needs rather than rely on a strict maximum number in each grade level (findings #4 and #5)



Examine the cost of hiring additional preschool staff to accommodate overbooking in the youngest grades. Faculty is strong (finding #2) but succession planning is always a consideration when hiring new teachers.



Explore an incentivized tuition schedule for families who choose to stay beyond preschool (finding #4). For example, if a family remains enrolled, through the continuous enrollment process, for a period of three years, beginning the fourth year, a 2% tuition remission could be offered after sliding scale tuition decisions. In essence, this is an incentive beyond sliding scale financial assistance.

## Recommendation #2: Customer Service

### *“The Nordstrom Effect”*

The next section of recommendations is centered on the premise that when a person buys a premium product they expect to receive first-rate customer service. We have adapted the phrase, the Nordstrom Effect (McGowan, 2009; Silverlining Marketing, 2022). Nordstrom department stores are nationally known for exemplary customer service and high-end products. Store employees go out of their way to make shoppers feel welcomed and valued by offering cold beverages and a friendly attitude. The store policies reflect the luxury care and service (e.g. Nordstrom return policies allows consumers to return previously worn items up to a year after purchase). The organization feels stable, secure, and mission aligned (finding #6). Our findings demonstrate a strong faculty (finding #2), loving community (finding #3), and high-quality academics (finding #1). These are strengths of Southfield. Playing to these strengths, Southfield has the recipe to secure its market share as a luxury provider. To be the luxury provider, however, Southfield School must consider:



Rolling out the red carpet not only in the admission process but year-round as part of a retention strategy. The current Admission Director focuses on bringing new families into the Southfield community and according to families, does this very well. This role should be expanded to include modernized enrollment management and retention strategies. This role should keep the pulse of the entire community through data management and should be ready to make data-driven decisions. In doing so, the admissions director should have the ability and power to provide early intervention strategies when families start to contemplate leaving (findings #4 and #5).



Stabilizing leadership. Southfield has experienced substantial leadership instability with four Heads of School (one leader served twice) in as many years. Our findings document that parents feel the stress of the leadership changes (finding #6). While we recognize that much of this was beyond the control of the school, turbulence ensued nevertheless. Some of the greatest assets of the school are also documented in our findings including the community, strong faculty, and high-quality academics as well as the traditions and longevity of the school over the past many decades. Stabilizing leadership and supporting and mentoring the newest leader will become absolutely essential to regain the confidence within the community.



Targeting luxury buyers rather than discount shoppers. Sell the strengths of the school rather than the affordability. In the early grades, consider admissions policies that favor a target audience rather than a first-come, first-serve policy. While offering a variable tuition scale makes sense and demonstrates Southfield's commitment to providing opportunities for many families, in the earliest grades, where there is stronger demand, you may consider fewer financial incentives, aid, and scholarship funds reserving these funds for incentives in the older, less occupied grades.

## Recommendation #3: Market Differentiation

The third recommendation stems from a product marketing perspective. We know that Southfield is in a saturated market with free competitors, and our findings demonstrate that parents are very aware of this (finding #4), therefore the need to differentiate is paramount. If the neighboring magnet school is similar in most ways (e.g., academically, athletically, etc.) apart from the lack of annual tuition, then convincing families to enroll and stay at Southfield becomes a matter of differentiation. Our findings show that parents value the high quality academics (finding #1), but even that is not enough to keep all families enrolled. Keeping families invested in the school may require additional academic opportunities. Some such examples include, but are not limited to:

- Language Emersion Programs (e.g. Spanish, French, Mandarin, Latin)
- Expanded Robotics and Technology Programs
- Entrepreneurial and Business Programs
- Science Research Programs
- Unusual or differentiated sports camps: Hockey, Trap, Lacrosse, etc.

According to our findings, the teachers are strong (finding #2) which should mean that they are more than capable of creating new programs that highlight the differences available to students at Southfield. The new leader of Southfield has a unique opportunity to bring new ideas to the school and promote new opportunities (finding #6) as she begins to carve her legacy as leader of the school. Helping teachers and faculty realize new programs and new potential should be a dream role for any aspiring and courageous leader. Opportunities await!

## 10. Project Conclusion

This entire process from understanding the problem of practice, increased attrition at Southfield School, to exploring literature that would help us isolate factors for our research design, developing research questions, collecting and analyzing data to triangulate emerging findings and building recommendations, as helped us to grow as researchers. When we set out on this journey, we had

done each of these steps in isolation, through various coursework, but had little experience combining and creating the work to produce something meaningful from all of the pieces. Through this process, we were able to use both of our areas of expertise to help a school address a problem.

We identified a problem of practice with Southfield and then set out to answer our research questions—why do parents choose

Southfield? and why do parents choose to leave Southfield? We used literature to develop factors for our survey design and then administered surveys to both current and past parents about their school choice decision regarding Southfield. We also conducted two parent focus groups, a teacher focus group, and leadership interviews. From this data, the following findings emerged:

- Finding #1: Parents choose Southfield primarily for academic reasons.
- Finding #2: Strong faculty increases student retention.
- Finding #3: Parents want to belong in the community.
- Finding #4: Finances, and a competitive free option, drive student attrition at Southfield.
- Finding #5: Family relocation affects Southfield's student attrition rate.
- Finding #6: Leadership changes have increased Southfield's student attrition.

These findings represent a mixed-method approach to data analysis and emerged through a process of data analysis.

Possible limitations for utilizing our findings include some rear-view realizations about our survey design. Vague word choices like convenience and relationships may have limited the findings. Parents in focus groups focused primarily on community themes, centered on relationships, while the survey indicated parents cared very little about relationships. Would the word community have been a better choice? Was convenience too broad? Should we have said transportation instead? These word choice decisions may have limited our findings. We also noticed that parents seemed to interchangeably use academics and curriculum. While we saw these terms differently, they were used in our data to interchangeably and to broadly encompass anything to do with learning or teaching. We ended up combining the two into an academics finding due to the complication of teasing out how parents had

defined these factors. The school did a great job of helping us to find parents and teachers to participate in our focus groups. They also tried hard to gather a representative sample from the school population. Still, there is some limitation and possible bias from selecting parents rather than having random volunteers from the population. The teachers who participated in the discussion had all been at the school for at least 7 years. We wondered if younger teachers have the same view of the school and climate?

Combining what we learned in our literature review with survey findings, we noticed another possible limitation of our study. When parents overwhelmingly suggested that academics was a main reason for choosing Southfield, we know from research by Schneider (2002) that parents are likely to indicate academics as one of their top reasons for school choice decisions even when there are other considerations. This could be partly due to parents feeling that they should rate academics higher than other factors when looking at schools, whether this is actually indicative of their true preferences. Validity of survey data is always a possible limitation of research that centers around personal values outside of a controlled lab experiment. Whether parents answered truthfully remains outside the scope of our research, so for the purpose of this work, we will assume given answers accurately reflect the perspectives of parents choosing to stay at the school or parents who have chosen to leave the school.

The school, or perhaps another researcher, could use our data to conduct additional research to better understand the nuances among some of the broader factors. When it comes to community: is it the relationship among teachers and students, students and students, teachers and parents, parents and parents, or all of these combined? We hope the school will investigate some of our recommendations as possible avenues for continued inquiry. It would be interesting to see how the recommendations might be applied and what outcomes might emerge or how might these recommendations open new paths for discovery as a school.

Beyond offering our research findings, recommendations, and sincere thanks, we do have a few low-level observations to continue to help the school, should they find these visitor-perspective, fresh-eyes helpful. If Southfield School is positioned as a luxury product with a substantial price tag, the first impressions it

makes on potential families are paramount. During our site visit to Southfield School, we noticed that the antique iron Southfield School sign in front of administration building is hard to read and in a state of disrepair (see Figure 9). We would suggest new, fresh, clean signage that reflects a strong luxury brand. While this sign may have sentimental value or tradition attached to it, a new sign might help modernize the initial feel for a prospective parent pulling up to the campus. The older sign could be repurposed into art or signage used elsewhere on campus.

We also noticed, while on campus, there were weeds growing in the flag area courtyard lawn that had not been recently

tended. A clean, well-groomed property sends a message of value, attention to detail, and confidence. We believe that very small physical touch-ups could make a big impact on first impressions of prospective parents.

Beyond maintenance needs, we noticed a school that was well-loved by the teachers who have made it their home for many years. As these teachers begin to retire, the school needs to develop a plan for recruiting, hiring, and retaining the next generation of Southfield teachers. We discovered through our research that Southfield is a special place to many, and we hope that it continues to thrive for another 88 years.

Figure 9: Southfield School facade



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# 12. Project Appendices

## Appendix A: Current Parent Survey

### Southfield School: Current Parent Survey

1. The decision to attend/stay at Southfield School is due to (drag into order of importance):

		Financial reasons
		Convenience/location
		Academic reasons
		Curriculum
		Extra-curricular
		Philosophical reasons
		Relationships
		Student's desire
		Parent's desire

2. If you have additional comments to add:

DONE

## Appendix B: Parent Focus Group Guide

### Focus Group Questions

1. What word or phrase comes to mind when you think of the Southfield School?
2. What drives your negative, neutral, or positive opinion of Southfield?
3. How has your perception changed over the past three years? Why?
4. What was the decision-making process like when you chose Southfield?
5. What has been your experience since coming to Southfield?
6. How can Southfield improve for you?
7. What is the best way for Southfield to communicate with you? Why?
8. Who do you think is the largest competitor to Southfield? Why?
9. What do our competitors do better than Southfield?
10. What does Southfield do better than our competitors?
11. What motivates you to stay at Southfield? Explain.

## Appendix C: Focus Group Demographic Data

Name	Focus Group	Grade Level	Longevity	Alum	Parent Gen	Parent Rac	Ethnicity
Liliva Wang	Mandy-1		2 4-6 years	No	F	Asian	Not
Liliva Wang	Mandy-1		6 4-6 years	No	F	Asian	Not
Rachna Patel	Mandy-2	Below PK	4-6 years	No	F	Asian	Not
Rachna Patel	Mandy-2	PK	4-6 years	No	F	Asian	Not
Rachna Patel	Mandy-2	K	4-6 years	No	F	Asian	Not
Kevin Flood	Mandy-3	Below PK	4-6 years	No	M	White	Not
Kevin Flood	Mandy-3	PK	4-6 years	No	M	White	Not
Kevin Flood	Mandy-3		1 4-6 years	No	M	White	Not
Andrew Crawford	Mandy-4	PK	1-3 years	Yes	M	White	Not
Shannon Elder	Mandy-5		1 4-6 years	No	F	White	Not
Shannon Elder	Mandy-5		3 4-6 years	No	F	White	Not
Lindsey Raymond	Mandy-6	PK	1-3 years	No	F	White	Not
Angela Frierson	Mandy-7		1 7-10 years	No	F	Black	Not
Angela Frierson	Mandy-7		4 7-10 years	No	F	Black	Not
Jennifer Paris	Mandy-8		8 1-3 years	No	F	White	Not
Unknown	Mandy-9	PK	1st year	No	F	Black	Not
Unknown	Mandy-9		7 1st year	No	F	Black	Not
Destiny Calahan	Mandy-10	PK	4-6 years	No	F	White	Not
Destiny Calahan	Mandy-10	PK	4-6 years	No	F	White	Not
Melissa Spellman	Jason-1	K	1-3 years	No	F	Black	Not
Jessica O'Neil	Jason-2		1 1-3 years	No	F	White	Not
Tina Paik	Jason-3		8 4-6 years	Yes	F	White	Not
Meredith Bell	Jason-4		7 1st year	No	F	White	Not
Elizabeth Kennedy	Jason-5	PK	4-6 years	No (gma is	F	White	Not
Elizabeth Kennedy	Jason-5		1 4-6 years	No (gma is	F	White	Not
Shani Crawford	Jason-6	PK	1-3 years	No	F	White	Not
Unknown	Jason-7		6 1-3 years	No	F	White	Not
Sam Smith	Jason-8		3 4-6 years	No	M	White	Not
Laura Moore	Jason-9	Below PK	4-6 years	No	F	White	Not
Laura Moore	Jason-9		1 4-6 years	No	F	White	Not
Leah Thelen	Teacher-1		6 10+	No	F	White	Not
Holly Berry	Teacher-2	6,7,8	10+	No	F	White	Not
Melissa Wyss	Teacher-3	PK	10+	No	F	White	Not
Kari Laborde	Teacher-4	PK	10+	No	F	White	Not
A. Hale	Teacher-5	PK	10+	No	F	White	Not
Unknown	Teacher-6		3 7-10 years	No	F	White	Not
Kay Batte	Teacher-7	PK-6	7-10 years	No	F	White	Not
Unknown	Teacher-8						

## Appendix D: Exited Parents Survey

### Southfield School: Past Parents Survey

1. The decision to leave Southfield School was due to (drag into order of importance):

		Financial Concerns
		Convenience/location
		Academic concerns
		Lack in curriculum
		Lack in extra-curricular activities
		Philosophical differences
		Personality conflicts
		Student's desire
		Parent's desire

2. If you would like to expand on any of the reasons, please explain:

3. If you want the research team to follow up, add your email here for more discussion



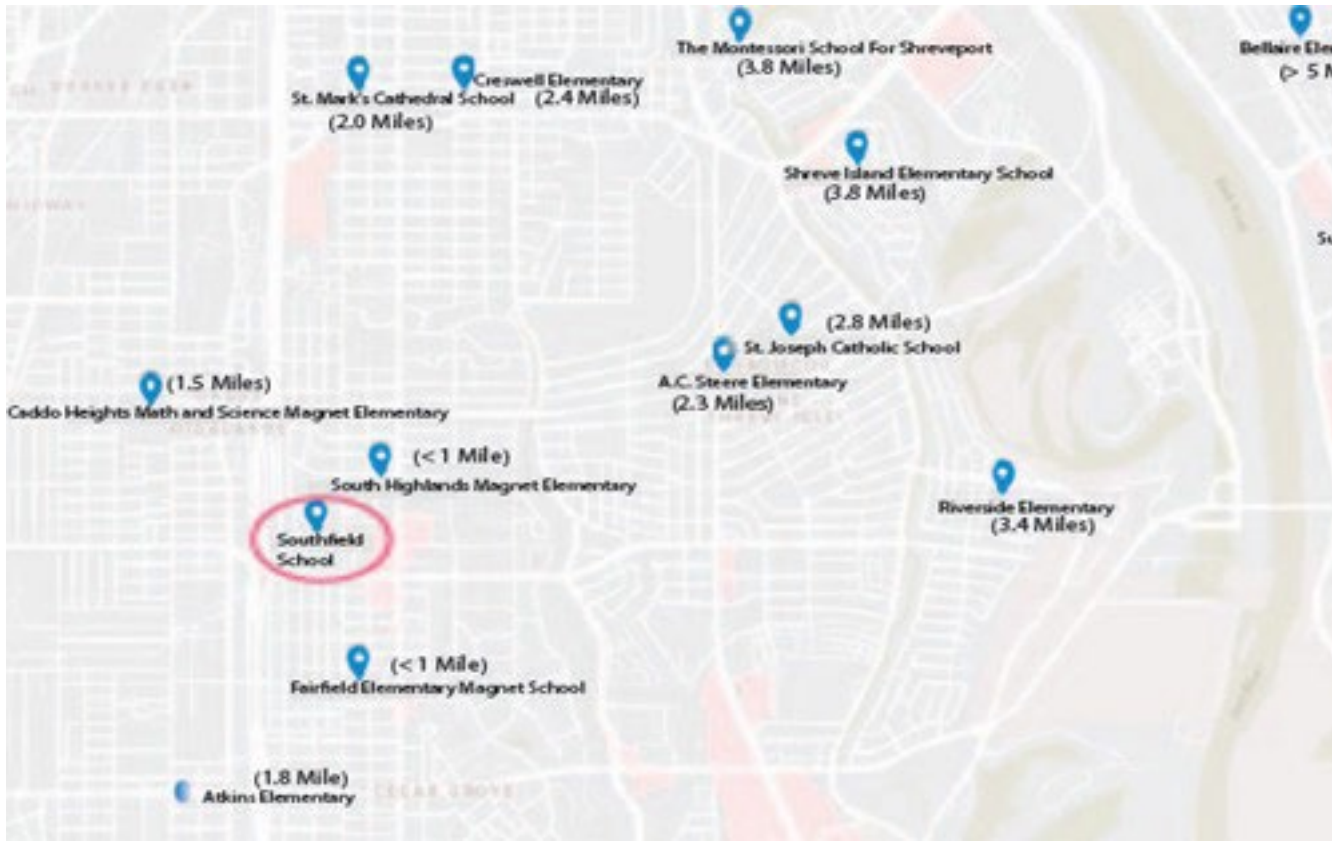
## Appendix E: Leadership Interview Questions

1. What word or phrase comes to mind when you think of the Southfield School?
2. How would you describe the employee culture and employee satisfaction at Southfield?
3. How has leadership changed over the past three years? Beyond just new leaders, what types of new programs or new philosophies have come with new leadership? In your opinion, is the school growing? Why or why not?
4. How does the leadership team make decisions at Southfield? Describe how decisions that affect the school are made?
5. What are your future hopes for Southfield?
6. How do you communicate with your stakeholders? What feedback have you received regarding communication at the school?
7. What are your goals for this year? What are the most important goals on your strategic plan? How are these goals formed? Who takes responsibility for achieving these goals? Who is held accountable for goals?
8. Who do you think is the largest competitor to Southfield? Why?
9. What do our competitors do better than Southfield?
10. What does Southfield do better than our competitors?
11. What motivates you to stay at Southfield? Explain.

## Appendix F: Teacher Focus Group Guide

1. What word or phrase comes to mind when you think of the Southfield School?
2. How would you describe what it feels like to work at Southfield?
3. What are Southfield's best attributes? Why?
4. What are some areas of needed growth for Southfield?
5. Why do you think parents choose Southfield for their children?
6. What is Southfield's mission? How do you see this mission operating in the school?
7. What is your favorite lesson to teach? Why? What is your favorite school activity? Why?
8. Have you taught at another school other than Southfield? How does Southfield compare to other teaching positions you have held?
9. Who do you think is the largest competitor to Southfield? Why?
10. What do our competitors do better than Southfield?
11. What does Southfield do better than our competitors?
12. What motivates you to stay at Southfield? Explain.

## Appendix G: Map of Neighboring Schools



## Appendix H: Survey Recruitment Letters

### Current Parents:

Dear Southfield Parents,

As you already know, our mission promotes lifelong learning. We are proud to be able to help doctoral students from Vanderbilt University continue their lifelong learning as well. For their doctoral project, they are trying to better understand school choice decisions that parents make, especially in the context of Southfield School. We hope that you will participate in the following survey, offering your opinions regarding why you chose Southfield School for your child or children. This anonymous information will be used by our friends at Vanderbilt to better inform our school about possible recommendations for enrollment and future needs. We appreciate that you have chosen Southfield School and we are eager to learn more! Just like our students, we continue to learn as a school!

Sincerely,  
Head of School

### Former Parents:

Dear Parent,

Hello from Southfield School! We are working with doctoral students from Vanderbilt University who are conducting research to learn more about parent school choice decisions. As former parents of Southfield, we hope that you will take a few minutes to answer these questions. This anonymous information will be used by our friends at Vanderbilt to better inform our school about possible recommendations for enrollment and future needs. We appreciate your help!

Sincerely,  
Head of School