

NATIONAL HYBRID SCHOOLS SURVEY 2024

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01 Introduction

This report includes the results of the third annual National Hybrid Schools Survey. In Year 3, we are finding results consistent with previous years, suggesting that we do have a reasonable grasp on what the landscape of hybrid schools around the country looks like, especially in terms of size, location, curriculum, and other operational characteristics.

In this third survey, we find continued and accelerating growth in the raw number of hybrid schools. These schools tend to have a diverse set of curricular programs, and that diversity seems to be increasing as well. Now that the U.S. is a few years past COVID-prompted school closings, the increased popularity in this model seems unlikely to be a fad, and these schools are more likely to persist and grow in the future.

Even though these schools follow a basic structure that uses time in innovative ways, with some formal, in-class instruction and some homeschooling, the communities that craft these schools tend to do so in several different ways – as private schools, as collections of homeschoolers, as charter schools, or even as conventional public school programs. Because of these different “operating systems,” no federal or private entity collects data on the sector as a whole. The value of this report continues to be in its unique effort to corral and report out information on the entire sector.

02 Hybrid Schools Defined

The nature of hybrid schools, microschoools, homeschool co-ops, learning pods, and other newly-popular, community crafted schooling arrangements is that they often take existing homeschool, charter school, or private school policies, and innovate on top of those. Because these arrangements start from the same few bases but look so different in their particulars, it is important to define the sort of schools represented in this report. As we have done previously, we operationally define “hybrid schools” as schools in which:

- “1. most or all of the curriculum is decided by the school (though varying levels of instruction and grading may be done by parents), and
2. students attend live classes fewer than 5 days per week in a physical building, and are “homeschooled” the rest of the week.”²

This definition allows us 1. to focus on the schools that have the most “institutional” characteristics, even if they are much less formal than most schools, and 2. to narrow our list

² Wearne, E. & Thompson, J. (2023). National Hybrid Schools Survey 2023: <https://www.kennesaw.edu/coles/centers/education-economics-center/docs/2023-hssurvey-report.pdf>

to a practical subset rather than including every possible homeschool co-op arrangement in the country. To locate hybrid schools to survey in all of their various modes (private schools, homeschool groups, charter schools, conventional public school programs), we conduct an ongoing set of searches for candidate schools. The searches for such schools includes finding schools through web searches; through contacts initiated by the National Hybrid Schools Project to schools themselves, or from schools contacting us; and through word-of-mouth referrals, which we then evaluate for inclusion or exclusion. Through these efforts, we have created a curated dataset of schools meeting our criteria. Again as in past years, we acknowledge distinctions among these schools, and make inclusion/exclusion decisions for a variety of reasons. If a particular hybrid school offered some a la carte classes but otherwise mostly determined the curriculum for individual students, that school was likely included. If a particular school was built mostly as a collection of a la carte classes, we would consider that functionally to be a homeschool co-op, and would exclude it from our list (while noting that such a school might still call itself a “hybrid.” These distinctions are only meant as a way to define a set of survey subjects). Some conventional five-day schools (both public and private) have started hybrid programs; we would likely include these programs as long as they were full programs and not a set of a la carte classes. Being religious or secular, private or public or charter did not matter for inclusion in the list. Whether students are considered by their states to be homeschoolers or students attending a school did not matter either (this is, in fact, still an aspect of this sector that will likely be a permanent example of unique school cultures and local policy characteristics). We find a variety of combinations of these characteristics and include them if they otherwise meet our definition of a “hybrid school.”

03 Quick Facts

- ◆ Hybrid schools seem to be growing in number and in size. The average enrollment has consistently grown over the past several years, from an average of 152 in 2018 to an average of 263 in 2023.
- ◆ The average hybrid school responding to this survey was founded in 2013, with a significant percentage founded in the last 3-5 years.
- ◆ Hybrid schools still seem to be a phenomenon of suburban areas, suggesting them as a school choice option for more middle class families.
- ◆ More hybrid school students than last year were considered to be “homeschoolers” than students enrolled in a school.
- ◆ The average hybrid school’s tuition is below the average education savings account (ESA) value in states with current ESA programs.



04 Methods and Data

This survey is an attempt to reach this specific model of schooling around the country in as comprehensive and systematic a way as possible. To do so, we have used consistent methods for the past three years. This year, in order to build on our unique dataset, which we created for the first annual survey, we again reached out to school leaders and asked them to complete the survey themselves, or to hand it off to member(s) of their team to complete it. We emailed a revised (but similar) version of our inaugural survey to school leaders, and the survey window was open from November 2, 2023 to December 1, 2023 (four weeks total). This year, we received over 70 responses to the survey request, and obtained a response rate of approximately 23 percent, both slight increases over the previous year. This survey has limitations in that even though it is a curated list, it is something of a convenience sample and relies on voluntary self-reporting by school leaders/administrative teams. As a group, the responses we received this year appear to be from a set of larger schools, on average, than in the past. Even as a descriptive project, however, this survey is still the most consistent measure of this sector of part-time school models.

05 Locations by State

The states colored green in Figure 1 include schools responding to this year's survey, Blue states in Figure 1 also contain hybrid schools, though no school from those states responded this year. The respondents' locations roughly follow the distribution of hybrid school locations in our full dataset overall. As shown in Figure 2, most responding schools were, as last year, located in the South and Texas, with clusters of schools elsewhere. (The state of Georgia is likely overrepresented once again because of our own location).

Figure 1: Hybrid School Distribution

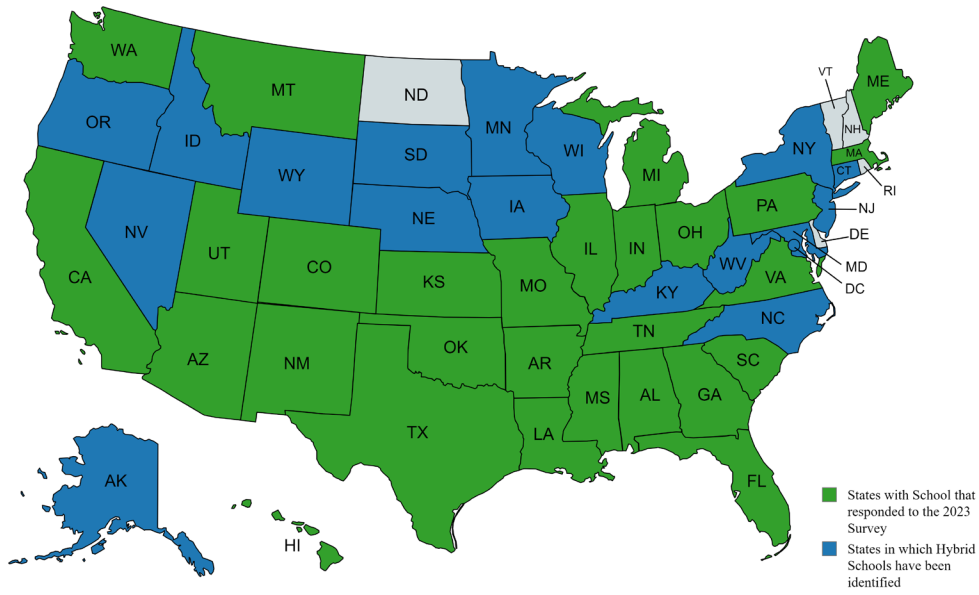
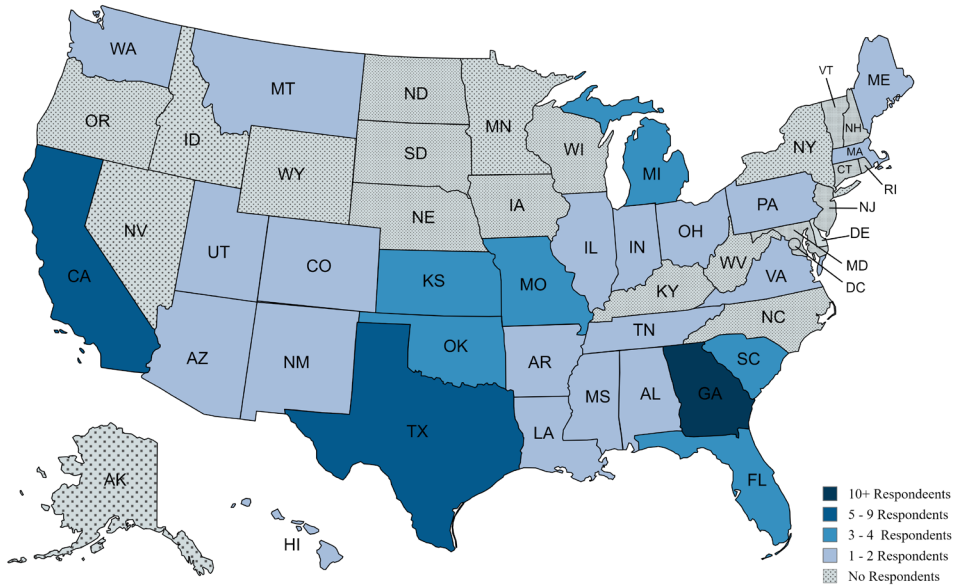


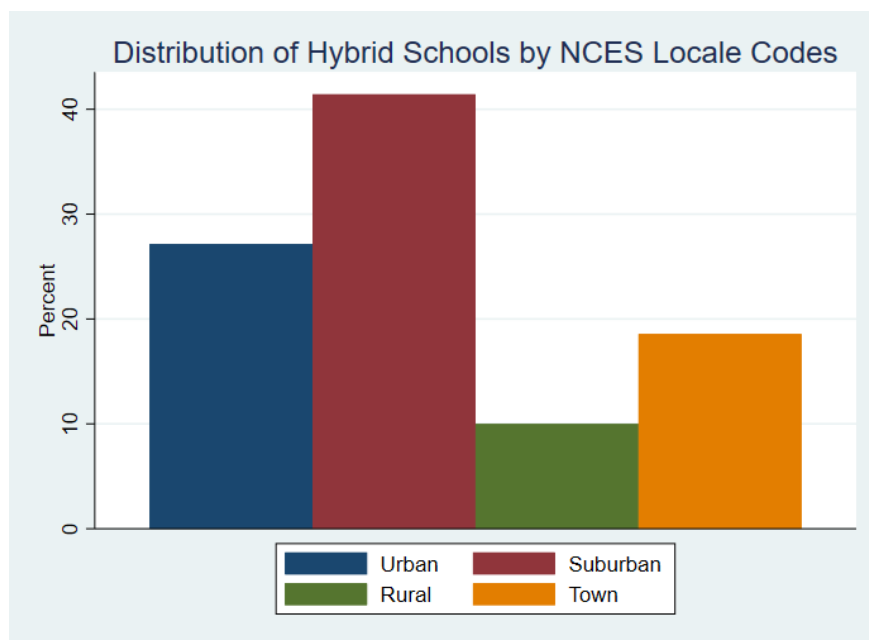
Figure 2: Hybrid School Distribution



06 Urbanicity

Location by urbanicity in 2023 returned similar results to prior years, with a smaller fraction of schools being located in suburban areas, and more hybrid schools located in areas categorized as rural or towns. This year, 43 percent of schools reported being located in suburban areas, with 28 percent in urban areas and 19 percent in rural areas. At this point we have a consistent finding that these schools are found in all geographic contexts, but still tend to be located most often in suburban areas.

Figure 3: Hybrid School Distribution by NCES Locale Codes



Notes:

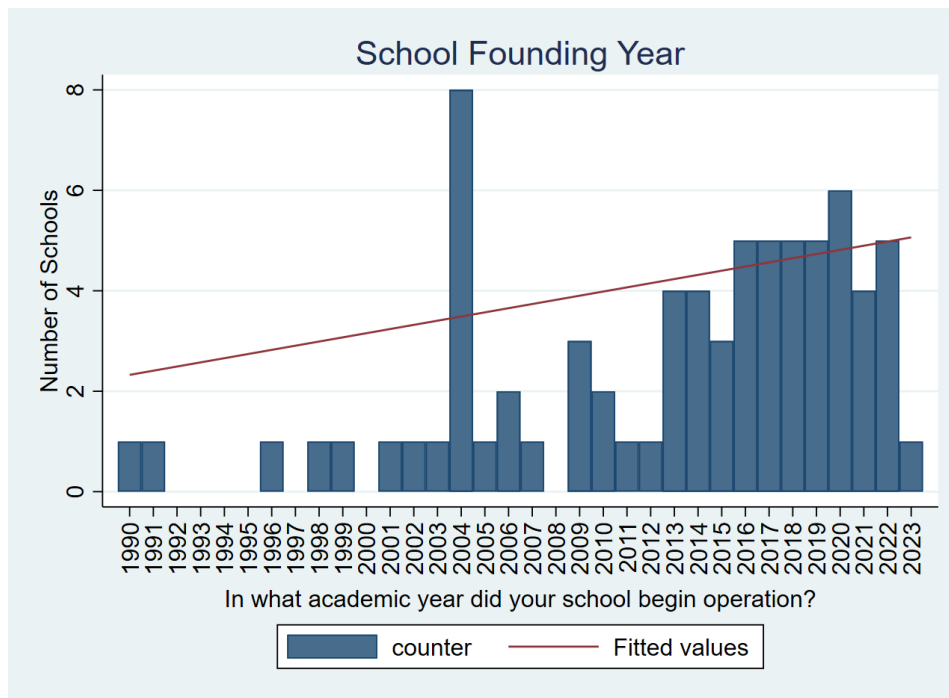
- a. Categories are based on NCES Locale Codes, with all "City" codes grouped together, all "Suburban" codes grouped together, all "Town" codes grouped together, and all "Rural" codes grouped together.
- b. See here for a discussion of NCES Locale Codes and their definitions: <https://nces.ed.gov/programs/edge/Geographic/LocaleBoundaries>
- c. For the purpose of this report, schools were assigned to a locale code based on their self-reported address information.

07 Characteristics

7.1 School Ages

We again found a pattern of new schools being founded at an increasing rate. The average start year for schools in this survey was late 2013, with half of the responding schools being founded in 2015 or later, and over a quarter of them being founded in 2019 or later (and 24.3 percent of responding schools were founded since the arrival of COVID-19 in 2020). The pace of new hybrid schools opening was increasing from around 2000-2015, but that pace has accelerated in recent years.

Figure 4: Hybrid School Founding Frequencies



Notes:

- a. This figure was generated from a sample of 70 survey responses and produced by averaging within each state all responses to the question "In what academic year did your school begin operation?".
- b. The trend line in the above figure represents a line of best fit for the average number of hybrid schools which opened per year from respondents to this survey.

7.2 Enrollments

Comparing enrollment levels to previous years, we again find evidence of increased average enrollment in hybrid schools, with the average enrollment level of K-12 students in 2023 being 263. Enrollments by grade maintained the pattern found in the prior year's survey: more students attend hybrid schools in grades K-8 than in high school, with high school enrollments again being the lowest.

Table 1: Hybrid School Enrollments by Grade Band

	Overall	K-8	9-12
Mean	263	200.3	59.1
Min	7	0	0
Max	2364	1813	551

^a The minimum number of students enrolled in the non Overall categories is 0 because not all hybrid schools enroll students from all grades.

Figure 5: Hybrid School Enrollments Over Time

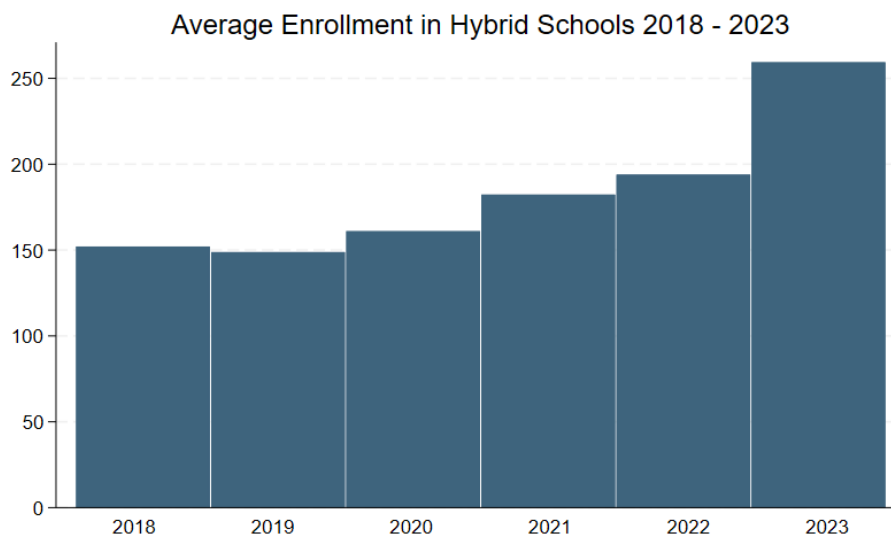


Figure 6: Hybrid School Enrollments By State

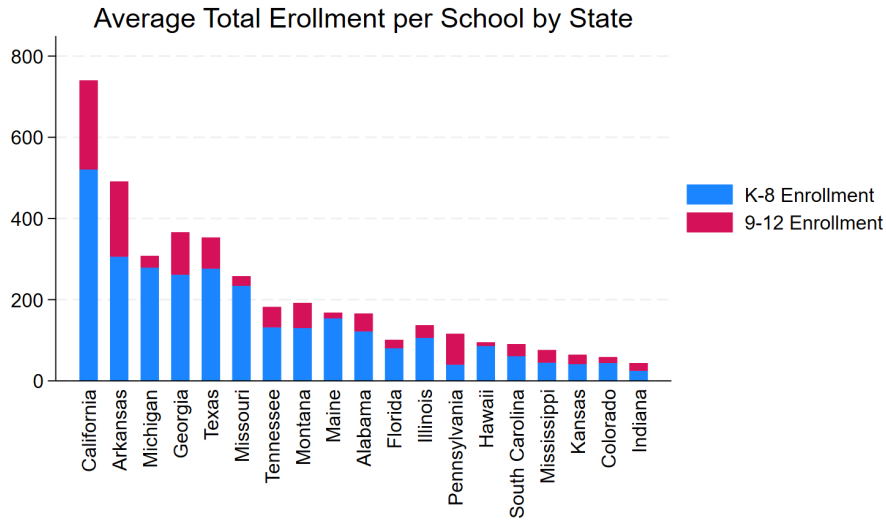


Table 2: Hybrid School Enrollments Over Time

	2018	2019	2020	2021	2022	2023
Mean	152.1	148.8	161.0	182.3	193.95	263.07
Min	5	4	15	4	6	7
Max	1,689	1,725	1,804	1,870	1,725	2,364
N	38	47	51	60	62	70



7.3 Tuition

Tuition among responding schools for the 2023-24 school year ranged from \$0 (public and charter versions) to \$8,250, with a mean tuition of \$4,071 and a median of \$3,600. This result is slightly higher than last year’s average of \$3,504, but still lower than 2021’s average of \$4,158, and may reflect the fact that the group of responding schools reporting their tuition this year was significantly smaller than in prior years. The average tuition among schools charging a tuition is \$4,385. Of course hybrid school families face particular tradeoffs – someone must be home to work with or at least monitor students on home days, rather than earning money at work – but this tuition level of \$4,385 would fall below the average education savings account (ESA) value in every state with an ESA program.³

Table 3: Tuition

Mean	Median	Min	Max
4,071	3,600	0	8,250

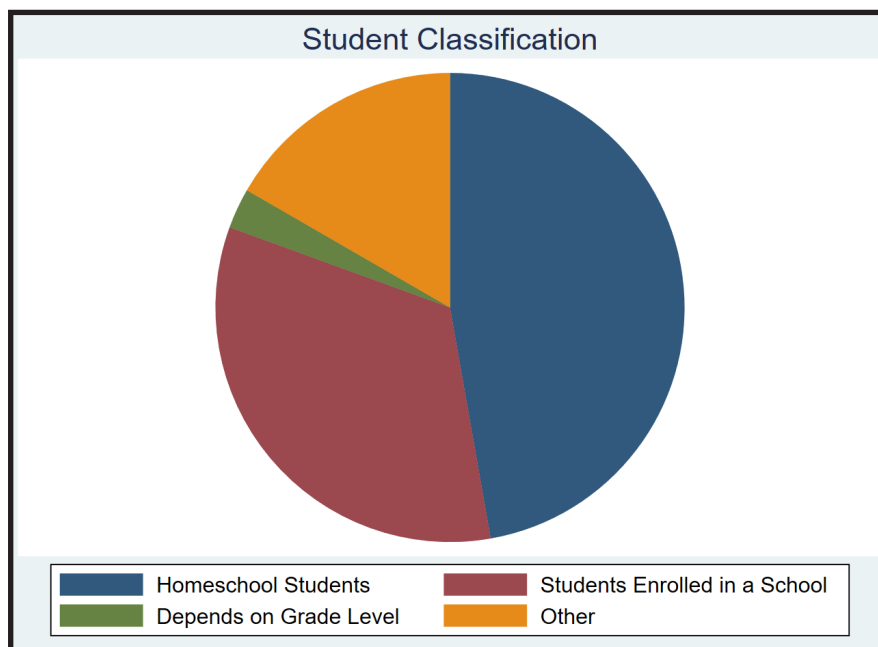
³ EdChoice lists the average amounts for current state ESA programs here: <https://www.edchoice.org/school-choice/types-of-school-choice/education-savings-account/>

08 School Models

8.1 Homeschool or Private School?

As noted above, these schools have aspects both of formal schools and of homeschools, and as such the schools themselves and the families that use them often feel that they are experiencing both kinds of education. While some percentage of the students included as part of the increase in “homeschooling” over the past few years⁴, the schools and families in this sector often give inconsistent or even seemingly contradictory responses to questions like “are your students homeschooled, or enrolled in a school?” In 2023, a larger percentage of schools responding to this survey said their students were homeschoolers, and a smaller percentage said that the classification “Depends on the grade level,” compared to past years.

Figure 7: Hybrid School Institution Classification



Notes:

- a. This figure was generated from a sample of 69 survey responses to the question "Are the students at this school formally registered as homeschool students, private school students, or something else."
- b. The majority of respondents who selected the "Other" category here indicated that their students were homeschool students enrolled in a school.

⁴ For example, see this discussion of recent US Census Bureau data:
<https://www.educationnext.org/new-u-s-census-bureau-data-confirm-growth-in-homeschooling-amid-pandemic/>

8.2 Curriculum Model

A slightly higher proportion of schools in this year's survey reported being classical schools (28.57 percent) compared to last year (25.7 percent), or alternative schools this year (35.71 percent) compared to last year (29.7 percent). These remain the two most-common curriculum models reported by respondents.

Table 4: Hybrid School Curriculum Models

Curriculum Model	Frequency	Avg. Student Enrollment
Regular / Comprehensive	22	190.5
STEM	2	146.5
Classical	20	345.5
Alternative / Other	25	280.1
Special Education	1	20

^a Here a Regular/Comprehensive school is a school that does not focus primarily on vocational, special, or alternative education.

^b Here a STEM school is a school that focuses on providing technical education focused in the fields of Science, Technology, Engineering, and Math.

^c Here a Classical school is a school which focuses on teaching students in a style which aligns with a classical education.

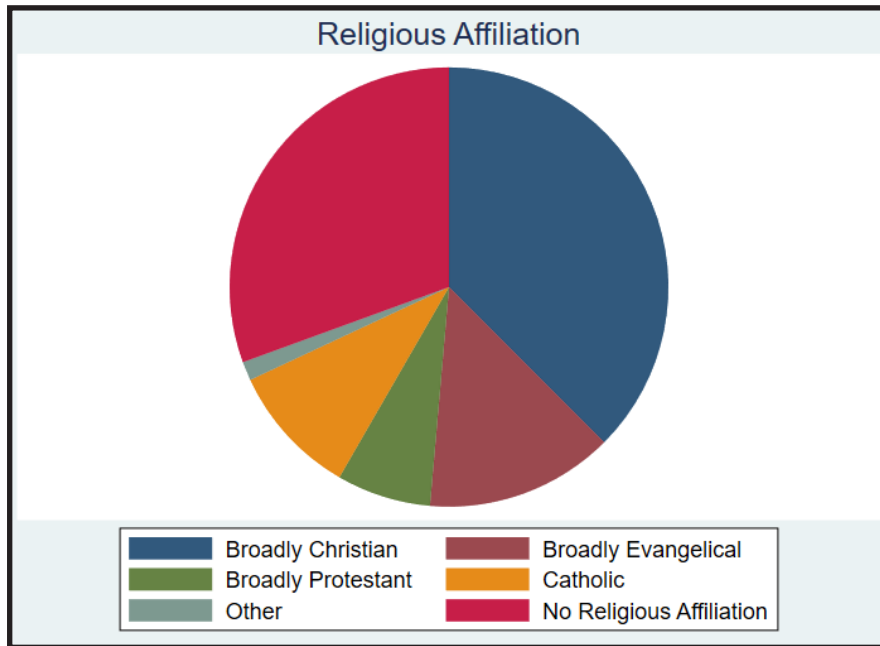
^d Here an Alternative school is a school that addresses needs of students that typically cannot be met in a regular school, or provides nontraditional education.

8.3 Religion

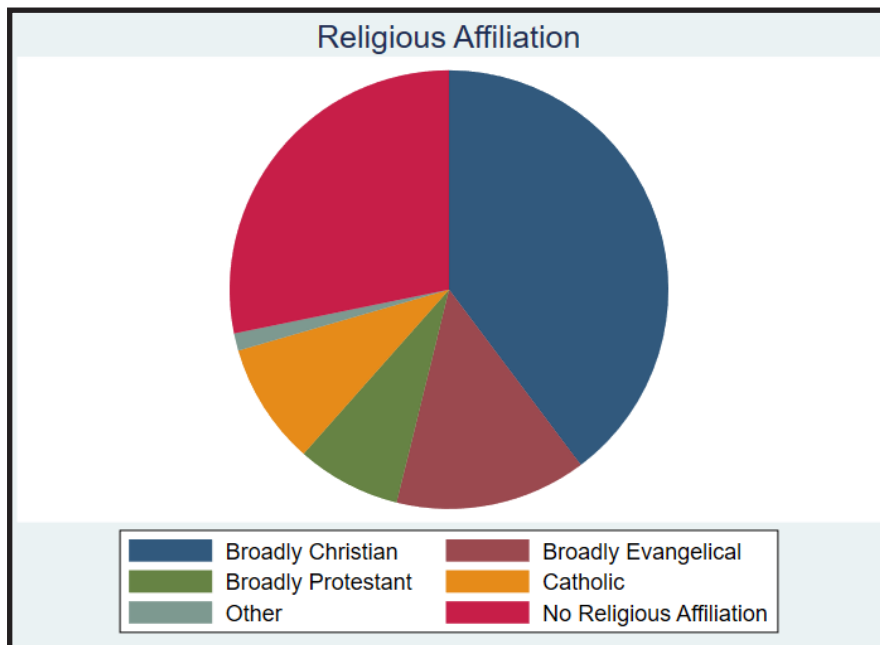
Religious Affiliation among respondents looks somewhat similar from past years. In a continuation of a trend, the percentage of schools claiming “No Religious Affiliation” grew again. This survey may be capturing more public/charter schools in responses over time, but also the number of the newer private hybrid schools which are not religiously-affiliated continues to grow. Figure 9 reports religious affiliation for the country as a whole, for Georgia and Texas individually (as both are overrepresented in our sample), and for all states excluding Georgia and Texas.

Figure 8: Hybrid School Religious Affiliations

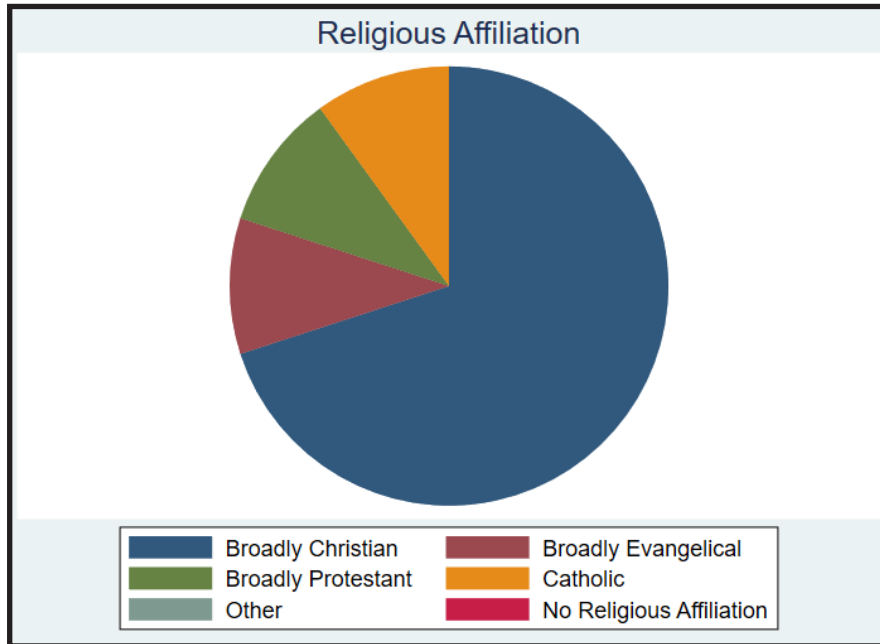
(a) Hybrid School Religious Affiliation - Overall



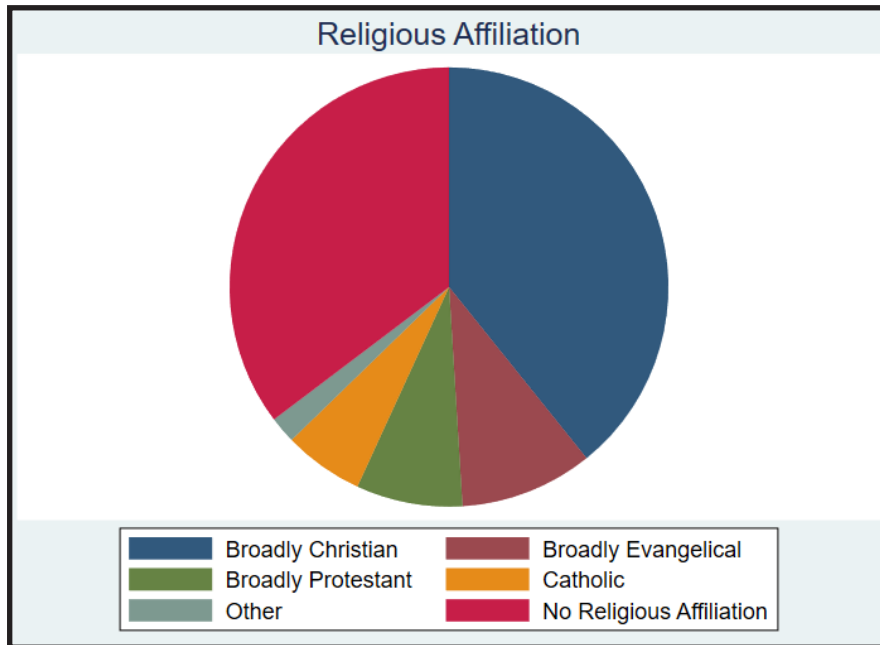
(b) Hybrid School Religious Affiliation - Georgia



(c) Hybrid School Religious Affiliation - Texas



(d) Hybrid School Religious Affiliation - Excluding Texas and Georgia



Notes:

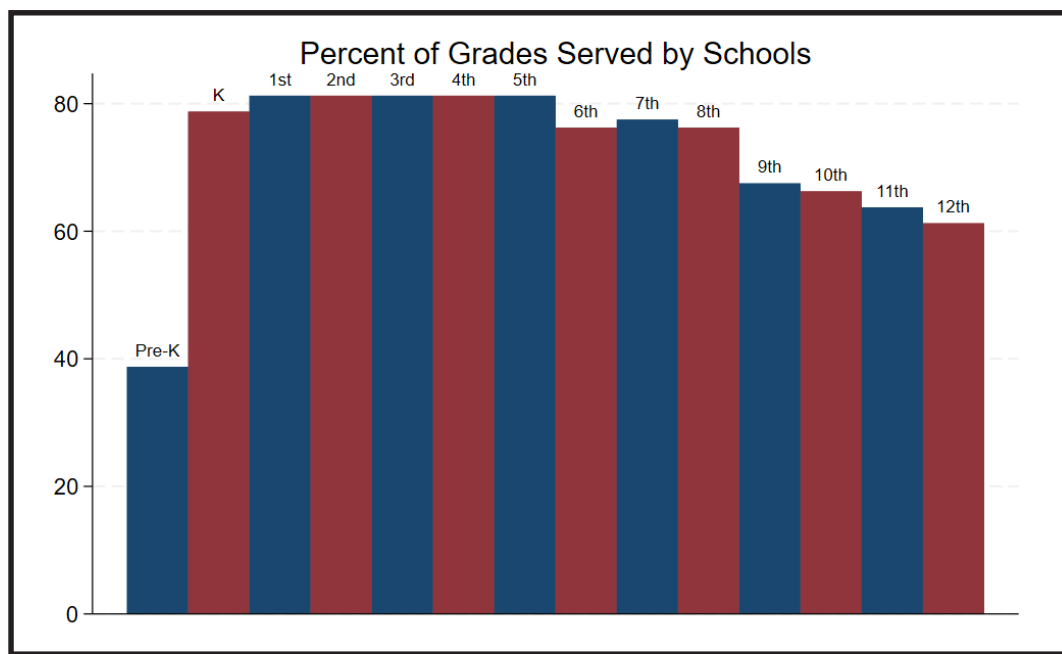
- a. This figure was generated from a sample (and sub-samples) of 70 survey responses to the question "What is your school's religious orientation or affiliation?"

09 Operations

9.1 Grades Served

Similar to previous years' respondents, more hybrid schools served students in elementary grades than middle school, and even fewer offered high school programs.

Figure 9: Hybrid School Grade Level Enrollment



Notes:

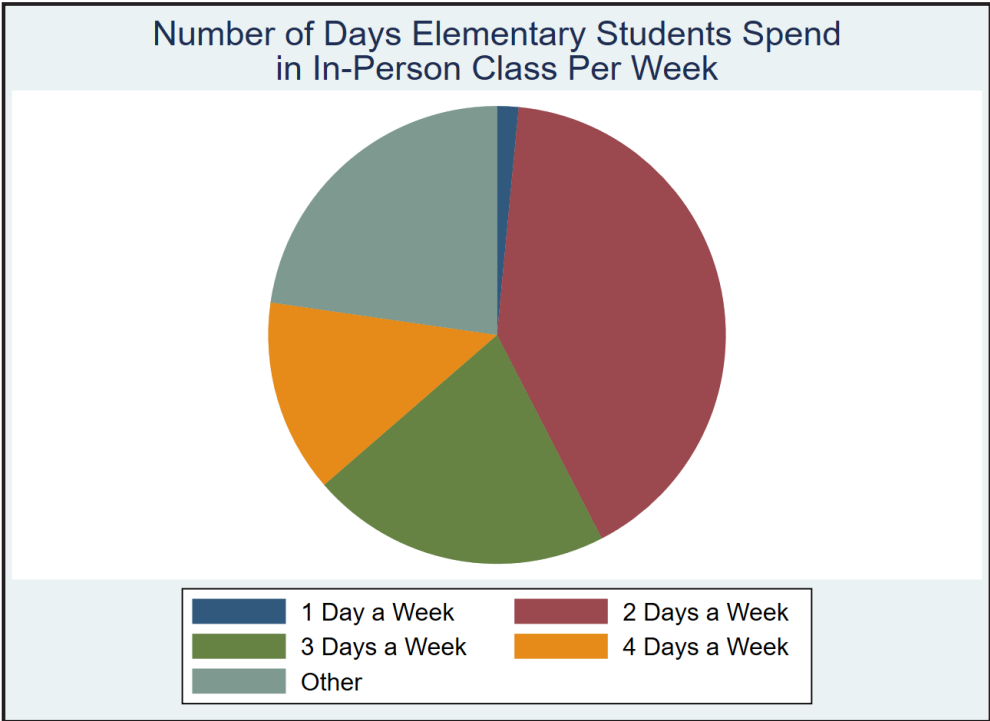
- a. This figure was generated from survey responses to the question "How many students were enrolled around the first of October."
- b. These bars represent the average enrollment within each grade across all hybrid schools.

9.2 Days per Week/per Year

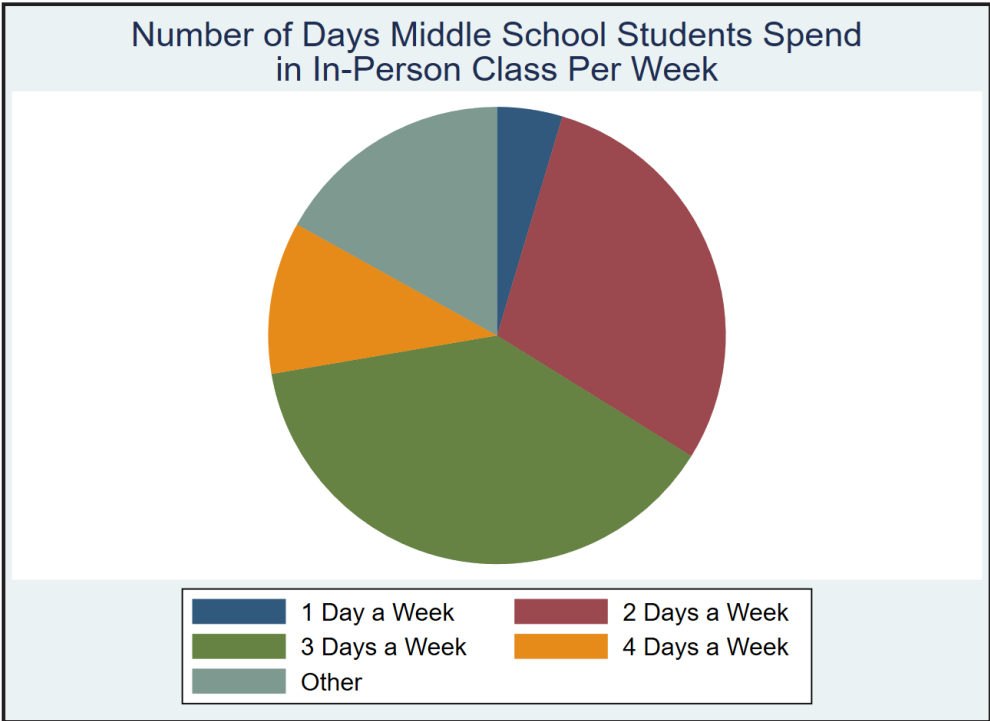
In 2023, a majority of schools reported that their students in elementary grades attended physical classes 2 days per week. Schools reported close pluralities of middle school students attending either 2 or 3 days per week (30 and 37 percent, respectively). In high school, 3-day weeks were most common (37 percent), but a sizeable plurality (21 percent) responded "Other" to this question. Most of these responses indicated that students attended a varying number of days per week which were particular to their program arrangements.

Figure 10: Hybrid School Days per Week that Students Attend Classes

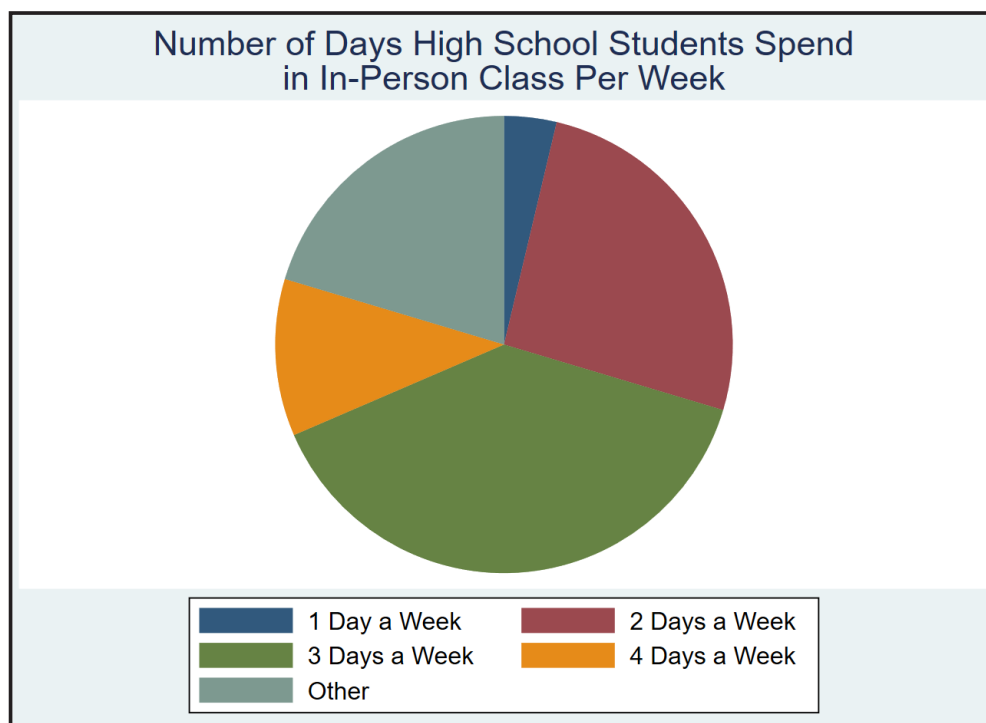
(a) Days Per Week - Elementary School



(b) Days Per Week - Middle School



(c) Days Per Week - High School



Notes:

- a. This figure was generated from a sample (and sub-samples) of 70 survey responses to the question "How many days per week do students physically attend your school."
- b. Figure 10(a) is composed of the 74 schools serving elementary school grades.
- c. Figure 10(b) is composed of the 72 schools serving middle school grades.
- d. Figure 10(c) is composed of the 61 schools serving high school grades.
- e. Here, respondents who selected "Other" primarily indicated that students in each category attended a varying number of days per week, which differed from student to student.

Table 5: Hybrid School Days per Week

	1-5	6-8	9-12
1 Day	0.02	0.05	0.04
2 Days	0.41	0.30	0.27
3 Days	0.22	0.37	0.37
4 Days	0.13	0.11	0.12
Other	0.23	0.17	0.21
Average	2.64	2.69	2.76
N	74	72	61



10 Future Efforts

Our dataset of schools has continued to grow, even after this survey window closed. We hope to continue to increase our participation numbers and rate in order to enable us to conduct more sophisticated analyses. In addition to growth, we hope to be able to track hybrid school closures over time. Because they are not conventional schools with ongoing, automatic funding, hybrid schools should close at higher rates than conventional schools (which almost never close at all). Tracking this attrition is something we intend to explore in the future.

Finally, we did include two experimental questions in the 2023-24 survey; one which asked questions about policy issues around ESA programs, and one asking school leaders to define success outcomes for their hybrid schools. Results from both of those analyses will be reported out by the National Hybrid Schools Project separately later this year.