

IMPACT OF OPTIONAL ASSIGNMENT

**Exploring the Impact of the Optional Assignment Policy on School Enrollment and
Equity in the State College Area School District**

A Doctoral Capstone Project

Submitted to the College of Education, Arts, and Humanities

Department of Education

In Partial Fulfillment of the
Requirements for the Degree of
Doctor of Education

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July 2026

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Dedication

This work is dedicated to my family who has always supported my educational journey.

First, to my mother, Denise Feters who taught me from an early age that education was everything and to never stop learning. Thank you for constantly reminding me to never settle for less than I was capable of and for always encouraging me to never give up. You raised me to lead with strength and heart, and everything I know about being both, I learned from you. Thank you for championing me every step of the way.

Next, to my husband, David who has been my quiet constant for over thirty years. Through the endless nights where you watched me work and while I continued to take classes, you kept everything else going without complaint and without question. Your quiet calmness and understanding helped to make this happen.

Finally, to my girls, Malarie and Alicia. When I first started back to school, I set out to help you understand the value of education and never lose sight of a goal. In the end, the two of you taught me just as much regarding life if not more in return. Watching the two of you face hard things and keep going reminded me, more times than I can count, that stumbling or failing is not the end of anything. It is simply another chance to try again! Your grit, drive, and determination through adversity pushed me to keep going on so many days that I was ready to walk away.

Acknowledgements

It is important for me to acknowledge several individuals who have helped me grow not only in my educational practice but also as a researcher and leader.

I want to begin by recognizing three women whose leadership, intelligence, and investment in others reflect the type of leader I aspire to be. Dr. Mary Wolf, thank you for your guidance and support throughout this process. Your positivity and push encouraged me to keep going and helped me understand the research process. Dr. Erica Frankenberg, thank you for consistently pushing me to think through an equity lens and for helping me understand and interpret patterns in school-level data with greater confidence and clarity. Dr. Laura Tobias, you were with me from the beginning and became my biggest cheerleader. From the first course to the last, you encouraged me, challenged me, and reminded me that finishing was worth it. Finally, it is important to acknowledge Dr. Brian Griffith, my external chair. Thank you for giving me my first chance as an administrator and continuing to be a strong mentor and confidant throughout my career.

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Abstract

State College Area School District's (SCASD) intradistrict optional assignment policy has allowed elementary families to request enrollment outside their zoned attendance area for more than 20 years. While the policy was designed to support family choice, the shifts in school demographics it may create raise equity questions the district had not previously examined. The mixed-methods study examined the impact of SCASD's optional assignment policy on families, students, and elementary schools and was guided by three research questions: (1) What factors influence families' decisions to pursue optional assignment? (2) How do the racial and socioeconomic demographics of students requesting optional assignment compare to those of the zone elementary schools? (3) And, how does the policy impact the demographics and academic outcomes of the elementary school buildings? The qualitative strand analyzed three years of open-ended parent responses from 201 optional assignment applications using thematic coding. The quantitative strand analyzed three years of building-level demographic, staffing, funding, and academic-achievement data using descriptive statistics, a chi-square goodness-of-fit test, a one-way ANOVA, and independent samples t-tests. Families cited eight recurring themes and the top three included child wellbeing, continuity of enrollment, and transportation. The racial and socioeconomic overall enrollment and differences was concentrated in specific buildings. Academic performance also varied significantly across the eight schools, with the highest concentrations of optionally assigned students of color enrolled in the district's lowest-performing building. These findings suggest the optional assignment policy, although intended to be supportive for parents, may be contributing to inequitable patterns across SCASD's elementary schools.

CHAPTER I

Introduction

School choice policies within public school districts are often developed to provide families with flexibility and equitable access to educational opportunities. One such policy is optional assignment, or intradistrict school choice, which allows families within a school district to request enrollment in a district neighborhood school outside their assigned attendance zone. The U.S. Department of Education (n.d.-a) explains that choice options such as intradistrict optional assignment are designed to support families by giving them access to schools and instructional institutions that best meet their children's and their own needs and interests. Optional assignment policies that are intended to support family preference and choice, if not developed through an equity and inclusivity lens, can create potential inequities.

When intradistrict school choice is permitted in school districts, it may unintentionally affect multiple school components, including student demographics, class sizes, staffing, funding, and even academic outcomes. Allowing optional assignment could unintentionally contribute to equity disparities within the district; however, when school districts use a fair, carefully developed system to enable students to attend schools outside their neighborhood, intradistrict choice can have a positive impact. Studying the effects of the optional assignment policy within a single suburban district in Central Pennsylvania will provide data-informed research to evaluate whether the current practice promotes equitable access or inadvertently causes disproportionate outcomes within schools.

Background

State College Area School District (SCASD) is a medium-sized suburban school district located in Central Pennsylvania. It is comprised of approximately 6,800 students and has eight community elementary schools ranging in size from 250 to 450 students. The elementary schools feed into two middle schools and one high school that serves students in grades 9-12. Within SCASD, the optional assignment policy has been a long-standing practice that enables families to seek placements outside their zoned or neighborhood elementary schools. Recognizing the district's mission to ensure equity and excellence for all students, district leaders have observed shifts in enrollment and building-level composition that raise important questions about how this policy potentially impacts students and schools. SCASD is a district dedicated to equitable practices and must critically examine whether its policies align with its values and promote fair access to high-quality learning environments across all elementary schools.

As the Assistant Superintendent of Elementary Education in the district, it is essential to understand the families who are choosing to opt out and the impact this has on shifts within the schools. Currently, the State College Area School District's optional assignment policy allows families to request school placements outside their designated neighborhood school by applying for an optional assignment to any district elementary school. While the policy intends to provide families with their school of choice, it may unintentionally cause changes in enrollment, demographic make-up, and equitable access and resources across the elementary schools. Researching the impacts of optional assignments can help better understand the broader impact and inform district-wide planning and equity efforts.

Capstone Focus

Schools' reputations within a community play a significant role in school choice. Holme (2002) explains that the quality of relationships and sense of community within a school are important deciding factors for parents when choosing a school for their children. Researching and reviewing how the optional assignment policy influences equity and access across all elementary schools within the State College Area School District is critical to the Assistant Superintendent of Elementary Education, who reviews and approves all optional assignment requests. This study can provide data that can inform future policies and decisions regarding intradistrict optional assignment.

To better understand the impact of the district's current optional assignment policy on families with elementary-aged students, collecting student data on the racial and socioeconomic demographics of students assigned to optional programs at all elementary schools can help assess whether the policy disproportionately impacts certain student groups or schools throughout the State College Area School District. Additionally, collecting data such as staffing, academic performance, enrollment trends, and funding allocations can help determine the policy's broader impact on equity and access. Using multiple data sources that consider how these factors interact and may unintentionally create inequities in access can provide the district with a strong foundation for future decision-making and support more equitable outcomes for students across all eight elementary schools. While optional assignment policies aim to provide families with intradistrict school of choice, questions remain about whether these policies equitably serve all students or inadvertently contribute to stratification within school districts. The following questions will guide research on the optional assignment policy

within SCASD and its effects on school demographics and student outcomes.

Research Questions

1. What factors influence families' decisions to pursue an optional assignment for their child(ren)?
2. How do the racial and socioeconomic demographics of elementary students requesting an optional assignment compare to the demographics of the zoned elementary schools?
3. How does the optional assignment policy impact the demographics and academic outcomes of the elementary school buildings?

Expected Outcomes

This mixed-methods study aims to understand why families choose to pursue optional assignments and how those choices impact elementary schools across the district. By reviewing three years of enrollment data, including student racial and socioeconomic demographics, school-level minority enrollment, and patterns of optional assignment requests across all eight elementary schools, the study will help identify trends in family demographics associated with optional assignment choices and factors driving these decisions. Additionally, by studying and disaggregating district-wide data on academic outcomes, enrollment, staffing, and funding allocations, the research can examine how optional assignment is impacting equity across elementary buildings. The findings will inform future district actions, including reviewing and enhancing current practices and using the data to guide planning and future decision-making on the school choice policy and procedures.

Fiscal Implications

This capstone research project has no direct financial implications for the State College Area School District. Research, surveys, data collection, and analysis will occur outside the school day. The researcher will use existing district resources and data, as well as district-owned technology, to complete the study. No additional staffing or materials are required, and the work aligns with current district priorities and the district's comprehensive plan.

If the research provides evidence and justification for changes to the optional assignment policy, financial impacts could result. Potential costs would be connected to specific district actions aimed at addressing identified concerns with the current optional assignment policy. These concerns could include the need to adjust staffing, provide professional development, or create enhanced data systems to track data. Additionally, there could be costs associated with time spent on policy enhancements and changes. If the data indicates a need for change, any changes or improvements would be addressed through the district's budget development and review process and shared with the Board to ensure transparency and demonstrate alignment with district priorities.

Summary

This project examines how the State College Area School District's optional assignment policy impacts families, students, and elementary schools across the district. Researching why families request optional assignments and how those choices impact enrollment, demographics, staffing, funding, and academic outcomes across all elementary schools will provide data that can inform the district as to whether the policy supports equity or where it may unintentionally create disproportionality within the

schools. The mixed-methods research approach will help the district make informed decisions about policy, staffing, professional development, and communication strategies. While completing the research itself requires no additional district funding, any recommendations arising from the study may entail costs that would be addressed through the normal budget process. Overall, the project is designed to give the district actionable, evidence-based insights to ensure that every elementary school provides equitable opportunities for all students and families. To ground this study in existing research and provide a broader perspective for the findings, Chapter II will focus on existing research, a review of related literature on school choice policies, and implications for practice.

CHAPTER II

Literature Review

School districts and school systems nationwide have different procedures and policies that allow for unique opportunities for families. In states throughout the nation, school choice options allow parents to select alternatives to the public school system. Within the United States, individual states vary widely in the types of school choice they authorize. According to the National Conference of State Legislatures (NCSL), school choice options can include open enrollment across district lines, magnet programs, charter schools, vouchers and education savings accounts (ESAs) (NCSL, n.d.). The U.S. Department of Education (n.d.-a) notes that these options are designed to support families by giving them access to schools and instructional institutions that best meet their children's and their own needs and interests. Data from the National Center for Education Statistics (2023) indicate that enrollment in public charter schools has been growing steadily over the past decade. This data reflects families' increasing demand and interest in specialized academic programs and flexible instructional models and choices. With the number of choices for parents, it is also important for public school districts to review and consider the various school choice options for families.

Successful choice programs require both state and local oversight to ensure equity, accountability, and quality across all educational settings (WestEd, n.d.). In some public school districts across the nation, parents can choose a different school within the district for their child to attend. Jabbar and Lenhoff (2019) explain that the term is known as intradistrict school choice, and this type of optional assignment can allow families to choose a different school within their district for their children to attend, in place of their

assigned neighborhood school. This opportunity can provide access to specific programs or unique school cultures that align with family preferences and student needs (Jabbar & Lenhoff, 2019).

Intradistrict school choice policies can provide interested families with a variety of options, provided the families can meet the guidelines set by the district for the optional assignment. Unlike interdistrict choice, charter schools, or magnet programs, intradistrict optional assignments allow students to remain within their local public school district but attend a different neighborhood school. Parents still have an opportunity to choose, but only within the schools in their local school district. When thoughtfully designed, intradistrict school choice options can reflect and support the diverse needs of families. As Pendergrass (2023) explains, because intradistrict optional assignments remain within a district, they allow for local oversight and accountability. This helps to ensure that all schools within the district operate under the same expectations.

School choice policies, including intradistrict optional assignments, are influenced by a combination of regulations, policies, and district initiatives. Federal, state, and local regulations work to ensure equitable access to choice programs and try to strike a balance between parental autonomy and equity goals (Feinberg & Lubienski, 2008; Mead, 2008). These policies are created to reduce barriers to entry, formalize application and acceptance procedures, and monitor demographic impacts to prevent unintended segregation within school districts. Mead (2008) explains that school choice programs can promote both innovation and responsiveness to parent and student needs but must be careful to avoid creating segregation or inequality. Feinberg and Lubienski (2008)

explain that unequal access can occur with choice programs unless policy deliberately accounts for equity rather than relying solely on market forces, and Mead (2008) further argues that regulations at the federal, state, and local levels must develop equity-focused frameworks to prevent unintended segregation.

To better understand the impact of school choice policies, researchers have examined data from across the world and at the state and local levels within the United States. Their findings show that both the structure of school choice programs, the quality of the schools, and families' financial situations can impact whether students are placed equitably in schools. Willie et al. (2002) found that when schools use a fair and carefully developed system to permit students to attend schools outside of their neighborhood, families can choose where their children attend school while ensuring schools have a cross-section of students from different backgrounds and cultures. Additionally, Willie and Alves (1996) found that equitable access requires schools and states to consider both student demographics and overall program design as a way to highlight how planning can reduce segregation while still providing choice opportunities for families. With this understanding and other research to support it, policymakers must look at enrollment procedures and school choice policies to ensure that a foundation focused on equity and inclusivity is at the forefront.

In a review of policies, the complexities of school choice are evident. Researchers Epple and Romano (1998) developed and studied models examining how private and public schools interact under choice policies. Their research pointed out that concerns such as peer influence and differences in tuition can unintentionally create division. In public education, this kind of division is called stratification. According to Orfield and

Frankenberg (2013), stratification sorts students into different schools based on factors such as income level, race, or academic ability. They go on to explain that when school choice policies are not designed with equity in mind, they can worsen these divisions by unintentionally giving families with more resources an even greater advantage. This, in turn, often leads to unequal access to opportunities and inequities within systems.

Other researchers, Epple and Romano (1998), found that, in competitive school environments, higher-income or higher-achieving students tend to cluster in certain schools, often those perceived as higher quality. Lower-income or lower-achieving students often enroll in less-resourced or lower-performing schools. Because of this, existing inequalities worsen due to the fact that families with more advantages tend to be the ones who benefit. However, when school choice policies are thoughtfully designed, grounded in research, and supported by clear policies, they can help create equitable systems. With the proper structure, choice can give more families access to high-quality schools and still encourage healthy competition that pushes schools to improve (Epple et al., 2000).

Current research highlights the importance of intentional policy design at multiple levels of the education system. National guidance and state-level regulations set the parameters and oversight for equity. However, according to Willie et al. (2002), the actual implementation of the regulations occurs at the district level, where local demographics, school capacities, and community priorities must be considered. When this is done, school leaders can better understand how these programs impact students and enhance and develop policies to prevent inequities before they occur.

Theoretical Framework

A complex mix of family preferences, government regulations, and district-level planning shapes school choice policies throughout the United States. Most policies are developed to give families more say in where their children go to school; however, the impact that results from families' decisions is shaped not just by practical concerns like cost or convenience, but also by deeper social factors like class, access to information, and community networks. Two key theories, Rational Choice Theory and Social Reproduction Theory, help explain how and why families make school decisions and provide insight into the equity implications of school choice.

Rational Choice Theory suggests that families make school decisions much like consumers selecting a product (Jabbar & Lenhoff, 2019). When choosing a school, parents evaluate the perceived advantages and disadvantages of each option and select the one they believe will produce the best outcome for their child. These types of decisions families make are grounded in a theory known as Rational Choice. Theorist Charles Manski (1992) used this theory and applied it to education to explain that parents act as rational agents trying to maximize their child's future success even when they do not have complete information. Building on Manski's (1992) work, Lievore and Triventi (2022) explained that families from different social backgrounds approach school choice options differently. Their research found that both upper and middle-class families do not mind sending their children to schools that are farther away from their house, but lower-income families often do, and instead prioritize proximity. These differences show that school choice decisions are not simply about what families want; it is also impacted by bigger social and economic factors and what options are available for certain types of

families.

A second theory, Social Reproduction Theory, helps explain how school choice can unintentionally reinforce inequalities. In his work, Pierre Bourdieu (1986) argued that schools often reward the cultural knowledge and behaviors of middle and upper-class families. Families with a strong cultural understanding and awareness are better at navigating school systems, communicating effectively with school officials and educators, and understanding and examining academic expectations. Additionally, Ball et al. (1996) found that middle-class families often use social connections or other available resources to choose the school they believe is best suited to their children. Unfortunately, school choice policies intended to promote equity can instead benefit families who already possess the skills and knowledge to navigate it successfully.

It is important to note that without strong equity-focused policies, states and districts that permit school choice will not only be inequitable but also unknowingly reproduce it (Collins, 2009). When there is little to no oversight at the national, state, or local level, families with more resources can work together to determine the school they want to place their children. This can ultimately lead to concerns for districts, including but not limited to uneven enrollment, required staff shifts or reductions, and uneven resources.

Together, these two theories show that school choice is not about providing options; instead, it is about understanding how those options are used, who benefits from them, and how they can unintentionally cause a disadvantage. Combining both theories to review school choice helps explain families' decision-making processes and the systemic barriers that can limit access for some, oftentimes marginalized, populations. In

understanding these theories and applying them to school choice policy, systems, and policies can be carefully designed to ensure that they are equitable and inclusive.

These two frameworks are especially important when reviewing policies for intradistrict school choice, where families select schools within the same district. For districts that want to support this model, it is critical to weigh both the benefits and the challenges before creating policy. From a positive outlook, intradistrict choice can promote access to specialized academic programs, inclusive school climates, and greater diversity across schools. However, negative impacts can include a lack of transportation for all and complicated application processes, especially for families with fewer resources (Manski, 1992). For example, one family might choose a high-performing school farther from home because of its academic reputation. At the same time, another might remain at a nearby school that offers a diverse environment or one similar to their own culture. Others who may want to try a different school could be halted due to not having reliable transportation.

These two theories, when connected, help to show that not all families have equitable access to information or resources often required for intradistrict school choice. Both middle and upper-income families typically have a greater understanding of school systems, stronger advocacy skills, and broader social networks, which provide an advantage in securing placements (Ball et al., 1996). Lower-income families, on the other hand, may face barriers such as limited transportation, language differences, or a lack of awareness about available options. Even within a single school district that offers school choice, existing inequalities can occur unless policies are developed by a team to intentionally promote equitable access for all (Collins, 2009).

Allowing families to choose schools within their own district can be an excellent way to provide choice, satisfy families, and allow them to choose what they perceive to be best for their children, but districts must plan carefully to make sure their system is fair and all families have the same benefits. When implemented with careful consideration of inclusion, equity, and research to support decisions, intradistrict school choice can empower families and strengthen communities. Without attention and understanding of a variety of potential barriers, however, it risks creating inequities, resource imbalances, and possible segregation. Understanding how families make decisions and how social structures shape those decisions is critical for designing intradistrict choice systems that are both effective and fair.

Exploring why families choose optional assignments, who makes those choices, and how they impact all district schools can inform policies that better serve every student. To better understand how school choice works today, it helps to look at the history of school choice. Understanding the history, why school choice was implemented, and the successes and barriers of it can help inform research and policies that will better support all students.

History of School Choice in the United States

To understand how today's school choice policies have evolved, it is essential to examine the historical foundations of public education and school choice in the United States. For this review, the following types of school choice will be reviewed: magnet, voucher, interdistrict, and intradistrict choice. The concept of neighborhood schools, where students attend the school closest to their homes, has been a part of the American public education system since the 19th century, when the first compulsory education laws

were enacted. (Mead, 2008). In fact, in 1853, Massachusetts was the first state to adopt compulsory education laws, but by the end of the century, most states had them. States at that time had an interest in ensuring “an educated citizenry and defining what it means to be educated” (Mead, 2008, p. 3). As states were defining compulsory attendance laws, they were also reviewing school choice. For many years, the choice was limited to public or private. As early as 1869, however, school choice programs existed. The state of Vermont was the first in the nation to offer a voucher or tuition program that allowed parents a choice. Known as Vermont’s Town Tuitioning Program, it still exists today, allowing parents who qualify to attend a school of choice (EdChoice, n.d.). Programs like this provide vouchers or tuition grants to families in towns without community schools.

Throughout history, legal cases involving parents’ rights, coupled with states’ responsibilities to ensure equitable education, have helped shape school choice programs (Feinberg & Lubienski, 2008). Policies for school choice continued in the United States and increased in the 1950s and 1960s as debates about equity, desegregation, and parental rights gained momentum nationwide. During this time, schools in the United States employed what was known as a dual school system, where there were designated schools for Black children and separate schools for White children (Horne, 2024). This dual school system model evolved from *Plessy v. Ferguson* (1896), a case that held that racial segregation was legal so long as the facilities provided were supposedly equal. This decision gave legal support to segregated schools for decades. In time, however, this ruling created significant educational inequities by allowing states to maintain racially segregated schools that were found to be unequal in resources, facilities, and opportunities (Ashford-Hanserd et al., 2020).

The *Plessy v. Ferguson* (1896) case created a barrier to educational equity that persisted well into the 20th century and set the stage for the landmark *Brown v. Board of Education* (1954) case and decision. It was on May 17, 1954, that the United States Supreme Court issued the *Brown v. Board* ruling that declared segregated public-school systems were unequal and therefore unconstitutional under the Equal Protection Clause of the Fourteenth Amendment (National Archives, n.d.). This key ruling overturned *Plessy v. Ferguson* (1896), which had upheld segregated school facilities for years. The *Brown* decision marked a turning point in American civil rights history. It is a decision that created legal practices to eliminate racial segregation in schools throughout the United States. This decision finally overruled the “separate but equal” principle established by *Plessy v. Ferguson* (National Archives, n.d.).

The *Brown v. Board of Education* case marked the end of segregation in public schools nationwide and initiated a nationwide push for integration and inclusion (National Archives, n.d.). Although marked by controversy, the ruling led to a nationwide push toward integration and inclusion; however, resistance began to emerge in many communities (MacLean, 2021). MacLean (2021) explains that the *Brown* decision caused many white communities in the South to find ways to avoid sending their children to school with Black students. In reviewing the law, they found that the ruling only applied to public schools, so some turned to private education as an alternative. In states such as Virginia, leaders developed a plan called “Massive Resistance,” and the state offered vouchers or what they referred to as “tuition grants” to white families who wanted to shift to a private school. This was a coordinated campaign by white leaders and cut off state funding to integrated schools while providing tuition grants to white families

who then sent their children to private schools (Encyclopedia Virginia, n.d.).

As the years continued throughout the twentieth century, the purpose of school choice shifted to a focus on providing families with greater flexibility and the opportunity to select schools that best matched their children's needs. Instead of being used mainly to resist desegregation, school choice began to be seen as a way to improve education and give all families more control over the school their children attended. In the late 1960s and throughout the 1970s, the concept of Magnet Schools was introduced as part of desegregation efforts. Waldrip (n.d.) notes that Fantini's (1974) research established that students do not all learn the same way, which became a foundational idea behind the magnet school model of offering specialized, interest-based programs to encourage voluntary desegregation through diversity in enrollment.

Magnet schools often offered specialized programs in science, the arts, or technology that brought together students who were excited and interested in those subjects. The idea is that when students and teachers choose to be part of a school because they are interested in what it offers and what they are learning, they are more likely to be motivated and successful (Waldrip, n.d.). This approach, according to Waldrip, helped break down racial barriers by encouraging diversity through interest-based enrollment rather than mandatory reassignment. By using interest to determine and allow choice, the goal was that desegregation through parent choice would occur.

Magnet schools at that time were growing in urban areas where segregation was deeply rooted, promoting integration while giving families greater control over their children's education (George & Darling-Hammond, 2021). Today, Magnet schools still exist in some areas across the nation, with Magnet School Assistance programs available

in some states. These types of schools continue to be established and operate in ways that bring together diverse groups of students with a common interest, which, in turn, helps desegregate public schools. The Magnet School Assistance program continues to this day through the Federal Government. Congress authorizes it in Title IV, Part D of the Elementary and Secondary Education Act of 1965 (U.S. Department of Education, n.d.-b.).

During the 1980s and 1990s, school choice options continued to grow. During this time, in different areas throughout the nation, charter schools and open enrollment policies began to evolve and expand, giving families more freedom to choose where their children attended school, rather than their neighborhood school (Chubb & Moe, 1990). Education researchers Chubb and Moe (1990) argued that public schools were often hindered by excessive bureaucracy. They believed that if schools had more freedom to decide which schools outside their neighborhood to partner with, schools would be motivated to improve so that their students would remain enrolled.

As school choice expanded, so did the options for it, and in 1988, Minnesota became the first state to pass a statewide interdistrict open enrollment law in the United States (Carlson & Delaney, 2025). This interdistrict law permitted students to attend public schools outside of their home district as a district of choice at no cost to them. Throughout the nation, the support for this interdistrict option grew, and Wisconsin, Ohio, and Colorado adopted similar policies soon after Minnesota (Carlson & Delaney, 2025). This type of school choice was again designed to provide families with access to higher-performing schools and to promote competition among districts, even though, over the years, others have found that it contributes to segregation and financial strain for

districts that lose students (Carlson & Delaney, 2025).

With the expansion of school choice through vouchers, magnet schools, and interdistrict schools came intradistrict school choice, which allowed families to select a school within their home district. The National Center for Education Statistics (n.d.) explains that by the early 1990s, various types of choice programs had begun to emerge in many districts throughout the nation, with the West and Midwest regions being the most prominent. Many of these choices at the time were still Magnet Schools that had been built within a district; however, both inter- and intra-school district open enrollment can also be traced back to that time (Carlson & Delaney, 2025).

It is believed that one of the first intradistrict open enrollment processes occurred in 1989 in Ohio, when the state established policies for both inter and intradistrict school choice (Ohio Department of Education and Workforce, n.d.). Continuing through today, Ohio's policy allows students to attend schools outside of their attendance zone through both intradistrict and interdistrict options. This policy allows students to attend their school of choice tuition-free as long as space is available. According to the Ohio Department of Education and Workforce (n.d.), open enrollment was created to allow students to enroll in schools outside their assigned district on a tuition-free basis, providing families greater flexibility in choosing a public school regardless of where they reside. Poiner (2023) explains that Ohio's long-standing model has been examined as part of a broader national shift in public education away from assigned schools and toward greater family choice. He explains that now 21 states require intradistrict choice, and larger urban districts are continuing to adopt unified enrollment systems (Poiner, 2023).

School choice programs continue to grow, and there is ongoing interest from

local, state, and federal governments to review, enhance, and grow them. School choice policies, including optional assignments, are often seen as a way to give families more access to better schools and help promote a sense of overall belonging for students. Moreover, some educational leaders argue that expanding school choice options actually drives school improvement for all schools through competition. Carlson and Delaney (2025) point out that school choice policies are shaped by broader systemic factors and can produce varied outcomes depending on how they are designed and implemented. Still, not everyone agrees that school choice automatically leads to better student outcomes. Feinberg and Lubienski (2008) found that while competition can motivate schools to improve, it can also cause them to focus more on marketing strategies to entice families to enroll rather than on strong teaching and learning structures within their schools. For example, some schools might spend more time on key advertising or selecting students who are already performing well, rather than focusing on those who need the most support. Others may look for students who provide them with more funding to enroll, such as students with special education services. Feinberg and Lubienski (2008) found that school choice requires strong rules and thoughtful planning to ensure it benefits all students equitably, not just those with more resources or information. Together, Feinberg and Lubienski (2008) also explained that educational policy must be directly focused on the equity goal because governments or districts alone cannot guarantee freedom, equality, or achievement.

The ongoing expansion of school choice policies raises important questions about the type of children and families who benefit from these opportunities and how they impact school communities. As school choice policies and systems continue to be

reviewed, both nationally and within local school districts, policymakers and researchers must continue to work to understand the factors that influence families' decisions, the demographic shifts they drive, and the broader implications for equitable outcomes. To better understand the different types of school choice available today, it is important to review the types of public school choice and how optional assignment policies shape student experiences and school demographics.

Types of Public School Choice

With the numerous school choice options available today, it is essential to understand each type, its purpose, benefits, and concerns. Although this may not be an inclusive list, the main school choice options available at no cost to students and families today include charter schools, interdistrict opportunities, magnet schools, voucher programs, and intradistrict options. All are choices allotted to families in place of their neighborhood school and are offered at no cost; however, not all are available in all states and areas across the nation. School choice options are intended to provide families with opportunities to select learning environments that best meet their children's and their own academic and personal needs, in hopes of leading to greater satisfaction and success (Pendergrass, 2023).

Among school choice options, charter schools have continued to grow throughout the nation over the past 30 years. The National Charter Schools Founders Library (n.d.) defines charter schools as “public schools that operate with more flexibility than traditional district schools in exchange for greater accountability” (National Charter Schools Founders Library, n.d., para.1). Charter schools came to life in the early 1990s as a response to increased concerns about the limitations of traditional public education

(National Charter Schools Founders Library, n.d.). The first charter school law was passed in 1991 by the state of Minnesota. The law laid the groundwork for a school choice option that provides families more educational choices while encouraging enhanced innovation and more accountability within the public school system (National Charter Schools Founders Library, n.d.).

Charter schools were designed to operate with greater autonomy than traditional public-school systems. Under state and federal guidelines, charter schools were and continue to be granted more flexibility and freedom from existing district public school regulations if they can meet specific performance goals outlined in their charter agreements (National Charter Schools Founders Library, n.d.). According to Gawlik (2016), early charter schools nationwide often established specialized curricula that appealed to families of at-risk students, including, but not limited to, special education students and English language learners. Gawlik (2016) further explains that as charter schools continued to develop, they shifted their focus to accountability and autonomy, and states and the federal government continued to review them to determine whether they would continue to grow and survive, and how to improve their overall quality.

Charter school legislation has been regarded as an important step forward by some and was developed over many years through advocacy work and policy refinement. According to the National Charter Schools Foundation Library (NCSFL) (n.d.), reformers pushed for the idea of outcome-based schools that would have increased autonomy in return for accountability, aiming to encourage innovation while keeping high performance standards. The first charter school to open under this law was City Academy in St. Paul, Minnesota, which began serving students in 1992 (Minnesota

Association of Charter Schools, n.d.). Minnesota's bold move in 1991 paved the way for the widespread adoption of chartering laws nationwide. According to Gawlik (2016), since the first charter school opened in Minnesota, more than 40 state legislatures have enacted laws promoting the development of charter schools. As of today, 45 states, the District of Columbia, and the territories of Guam and Puerto Rico have enacted charter school legislation, offering families tuition-free public-school alternatives with varying degrees of flexibility and oversight (Education Commission of the States, 2022; NCSFL, n.d.).

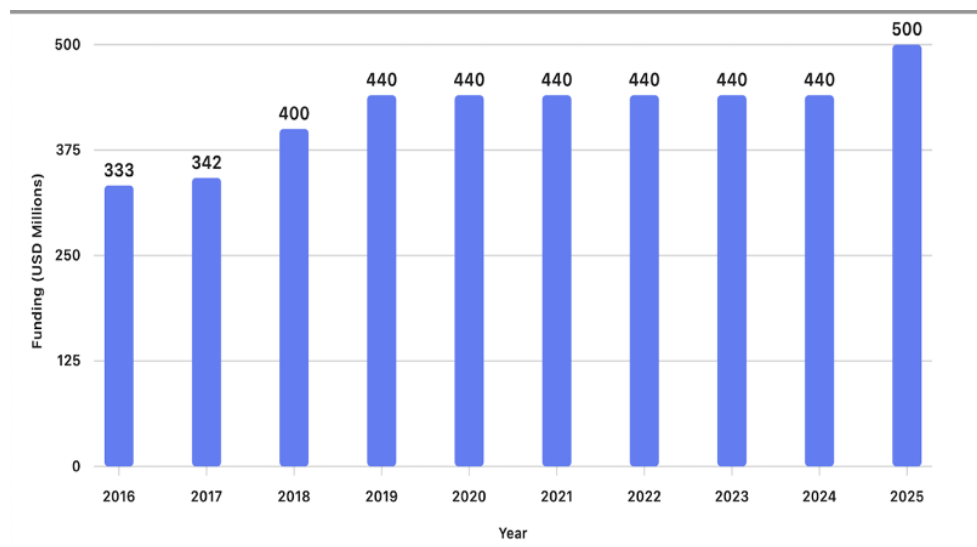
From 2019 to 2023, charter school enrollment grew by nine percent while traditional public-school enrollment declined (National Alliance for Public Charter Schools, 2023). In fact, recent data suggest that charter school enrollment has continued to grow throughout the past ten years. According to Agora Education Research (2025), charter school enrollment increased from 2.7 to 3.9 million students from 2015 to 2024. Using data from the National Center for Education Statistics (2023), Pennsylvania charter school students have grown from 7.7% to 9.8% during this same timeframe, even though the number of charter schools in the state has dropped from 6.1% to 6.0%. Regarding racial distribution in charter schools nationwide, there has been a steady increase in Black and Hispanic students, with the Hispanic population increasing by almost 14% since 2019 and the Black population increasing by about 6% (Veney & Jacobs, 2023).

As charter schools continue to expand throughout states and the nation, support at the federal and state levels has also increased. Just this year, the U.S. Department of Education (2025a) announced a historic \$60 million increase to the Charter Schools

Program, raising its total budget to \$500 million, the largest total investment in the program's history and its first funding increase in six years (see Figure 1). This signals continued federal interest in charter funding. The funding supports six Charter Schools Program grant initiatives including the State Facilities Incentive Grants, Credit Enhancement Grants Entities, and the newly introduced Model Development and Dissemination Grants focused on funding innovative charter models nationwide (U.S. Department of Education, 2025b).

Figure 1

Federal Charter Schools Program Funding



Note. Data from The Federal Charter Schools Program: 2023 Impact Report, by National Alliance for Public Charter Schools, 2023 (<https://publiccharters.org/news/the-federal-charter-schools-program-2023-impact-report/>). The 2025 funding total reflects the \$60 million increase announced by the U.S. Department of Education (2025a), raising the total budget to \$500 million.

This emphasis on increased funding for charter schools shows a continued effort

to expand school choice to try to improve academic outcomes. While this funding shows strong federal support for innovation in public education, it also raises important questions about oversight, equitable access, and long-term sustainability.

If charter schools continue to grow and are viewed as a quality school choice nationwide, it will be critical to continue carefully evaluating their impact and to ensure that growth efforts are aligned with strong accountability, fair funding, and equitable support for all students. In certain urban areas throughout the nation, charter schools have seen success; however, they have also created challenges with funding and impact on nearby schools. Dougherty et al. (2024) found that the expansion of charter schools leads to increased racial segregation and can negatively impact enrollment in neighboring private and public schools. Additionally, Knight and DeMatthews (2024) stress the need for sustainable and equitable school finance systems since charter enrollment and growth can strain and negatively impact district resources, as districts are responsible for the payment. Understanding the various impacts charter enhancements can have, it is essential to review the drawbacks as policymakers and local leaders work to balance school choice funding with focused policy development. Without that, inequities could occur, and not all students would benefit from the offerings.

While charter schools over the past 30 years have increased and begun to change and expand the choices in public education, they represent just one small school-choice option. Another option, not available in all states, is interdistrict school choice. Interdistrict school choice options allow students to attend public schools outside their home district. Unlike charter schools, which operate entirely independently of the public school district, interdistrict school choice keeps students within the traditional

public school system. The difference is that it permits students to attend a different public school district and increases families' access to schools that may better meet their academic, social, or logistical needs (Skinner & Sorenson, 2025). As states across the nation continue to review ways to improve equity and opportunity for students, interdistrict choice has emerged as a school choice option with advantages and disadvantages. There are two major policy types of interdistrict open enrollment policies, according to Carlson and Delaney (2025). The first is mandatory policies, which require districts to enroll nonresident students, but often include conditions, such as prior disciplinary record, that allow districts to cite as a legal basis for refusing a student entry (Carlson & Delaney, 2025). The second type of policy is voluntary and gives districts the option of allowing nonresident students. Carlson and Delaney (2025) also note that some states require districts that share students to have a transfer agreement in place before any move is permitted.

Historically, interdistrict school choice can be traced back to the 1960s and 1970s through voluntary desegregation programs such as METCO in Massachusetts and Project Choice in Connecticut. These programs aimed to reduce racial and socioeconomic segregation by allowing urban students to attend suburban schools, making the choice an interdistrict option (Wells et al., 2013). These new interdistrict programs permitted, for the first time, crossing district boundaries, and this type of choice could offer students access to better schools, quality resources, and more diverse learning communities.

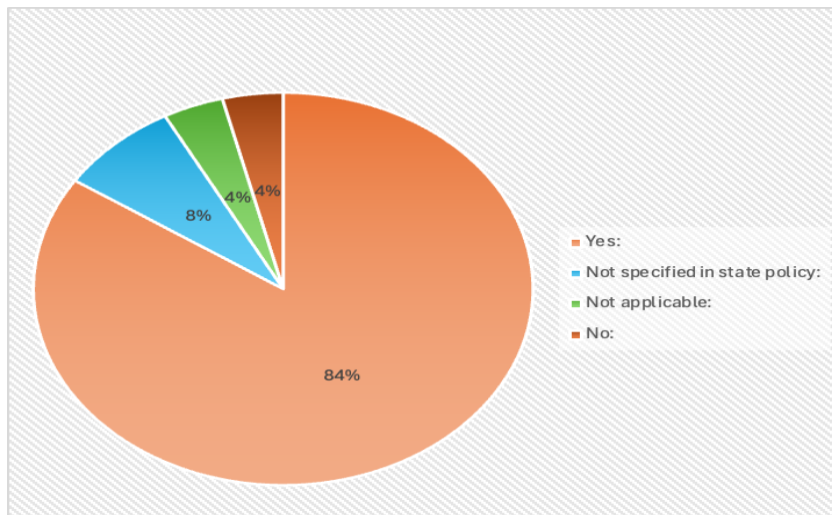
Pendergrass (2023) explains, by the late 1980s, interdistrict open enrollment options continued to gain momentum and were adopted by states to provide families with more choice and flexibility in selecting schools. Pendergrass (2023) shared, "a new

approach to creating equity in educational opportunity emerged: letting families choose their public schools rather than having their children be assigned to a specific school” (p. 3). Then, in 1988, Minnesota was the first state to enact an open enrollment law allowing students to attend any public school in the state regardless of residence (Carlson & Delaney, 2025; Pendergrass, 2023). This policy shift marked a significant shift from traditional district-bound enrollment policies. Minnesota laid the groundwork for other states, including Wisconsin, Ohio, and Colorado, to follow quickly (Carlson & Delaney, 2025; Pendergrass, 2023).

The most recent data show that 43 states currently have an interdistrict open enrollment policy (see Figure 2). Within those states, 15 have a mandatory policy, 19 have a voluntary program, and 9 have both a mandatory and a voluntary policy to guide districts (Carlson & Delaney, 2025). According to Skinner and Sorenson (2025), some states with interdistrict school choice policies set priorities for districts in admitting students. These include preferences for students attending low-performing schools or for increasing racial, ethnic, or economic diversity. A recent evaluation of interdistrict school choice programs found that while it can expand educational access, it also raises concerns about funding equity and district-level capacity. (New Jersey Policy Institute, 2025). Additionally, research indicates that affluent families are more likely to take advantage of choice programs, which can unintentionally reinforce patterns of stratification unless equity-focused safeguards are built into policy design (Holme & Richards, 2009).

Figure 2

Percentage of States' Permitting Interdistrict Open Enrollment



Note. Data from *50-State Comparison: Open Enrollment Policies*, by B. Erwin, B. Kelley, and G. Silva-Padron, 2022, Education Commission of the States (<https://www.ecs.org/50-state-comparison-open-enrollment-policies/>).

A different approach to school choice options other than charter and interdistrict school choice is magnet schools. Initially introduced in the 1960s, magnet schools were defined as “public elementary or secondary schools that seek to achieve voluntary desegregation through parental choice, rather than through student assignment, by offering specialized instruction and innovative academic offerings” (George & Darling-Hammond, 2021, p.2). According to Waldrup (n.d.), magnet schools originated under the assumption that students do not learn in the same ways. The thought was that if leaders could identify a theme, such as STEM, and use a different organizational structure for students with similar interests, those students could learn and would want to learn because of their interest in the subject matter being taught (Waldrup, n.d.).

The term magnet began to be used as early as the 1970s when policymakers were

working to eliminate segregation (Sinclair, 2021). The thought was that these schools were created to fulfill the *Brown v. Board of Education* decision, establish racial diversity, improve academic outcomes, and provide programming focused on specific themes (Sinclair, 2021). Federal aid for magnet schools was first authorized in 1976 as part of the Emergency School Aid Act (ESSA) and was intended as an alternative for districts required to develop court-ordered or voluntary school desegregation programs (Smrekar & Honey, 2015). Usually found in urban areas, magnet schools often operate within a school district but are structured to allow students across traditional attendance boundaries, serving as a strategic tool for desegregation (Siegel-Hawley & Frankenberg, 2019).

Like charter schools, magnet schools have also continued to grow. According to Magnet Schools of America (n.d.), there are approximately 4,340 magnet schools throughout the United States. These schools enroll approximately 3.5 million students. Additional data show that 67% of magnet schools have waiting lists of students who want to enter their school (Lytle, 2021). Like charter schools, many magnet schools accept students from across district boundaries and use weighted lotteries to enroll in way that is meant to promote equitable access and diversity (George et al., 2023). This type of structure from magnet schools matters for inclusive enrollment practices, and, according to Ayscue and Siegel-Hawley (2019), it is tied to civil rights goals and overall educational equity. With magnet school, the guiding principles they develop are essential for their success. Magnet Schools of America (n.d.) developed five guiding principles that set these schools apart: diversity, innovative curriculum and professional development, academic excellence, high-quality instructional systems, and family and

community partnerships. These principles provide a strong foundation; however, the way they are developed and implemented can vary widely across the different schools.

Magnet schools have both strengths and challenges with regard to school choice options. According to George et al. (2023), magnet schools with diverse and inclusive enrollment practices tend to support stronger academic outcomes, particularly in specialized areas such as STEM and the arts. With their commitment to diversity and equity, magnet schools tend to focus on key priorities of focused educational reform. Even with these strengths, however, magnet schools still face challenges. In fact, Available to All (2024) found that enrollment procedures have been found to be inconsistent, and access is not always equitable. Oftentimes, competitive or lottery-based admissions or a lack of transportation options makes it difficult for students from low-income families to attend. Available to All (2024) further explains that even though magnet schools are designed to promote integration, some programs may unintentionally contribute to tracking or separation within schools.

A final type of optional assignment is an intradistrict optional assignment and has similarities to interdistrict and magnet school choices. Intradistrict optional assignment, sometimes called intradistrict school choice or open enrollment within a district, allows families to enroll their children in a school other than their assigned neighborhood school. This type of school choice program emerged in the late 1990s as public school districts looked for competitive ways to provide families more options without requiring them to move or leave their current district (Carlson & Delaney, 2025). The goal of the introduction of intradistrict school choice was to keep children in the local public school district while providing families with options (Campos & Kearns, 2023).

Research on family participation in intradistrict school choice shows that families choose optional assignment for a variety of reasons, and not all families take advantage of these opportunities equally. Campos and Kearns (2023) explain that families consider overall academics, school climate, and language immersion when deciding which district school to attend. Additionally, location, transportation, practical factors such as before- and after-school care, and a sense of belonging can contribute to a family's intradistrict choice (Edwards, 2021). In fact, research has found that families with more resources and education, such as flexible work schedules, reliable transportation, and technological skills, are more likely to use intradistrict optional assignment (Phillips, et al., 2015). On the other hand, families living in low-income or high-poverty neighborhoods may face barriers that make it harder to participate. These include limited or no transportation, inflexible working hours, or a lack of awareness about the process. As a result, an optional assignment can increase differences between schools rather than reduce them. Districts that offer support, such as bus transportation or clear communication about deadlines and the overall enrollment process, tend to see more balanced participation (Phillips et al., 2015).

Over time, districts created different versions of optional assignment programs. Depending on the district, some use lottery systems, others give priority to certain students, and others offer specific academic themes or programs. While these efforts were designed to increase opportunity for all students, research shows that the outcomes vary. Kotok et al. (2019) found that in some areas, optional assignment programs have helped expand access and improve student outcomes, while in others they have unintentionally reinforced patterns of segregation or resource imbalance. Jabbar (2015) explains that

competition among schools sometimes leads to selective recruitment that positively impacts higher-income families but not lower-income ones. Without thoughtful planning and monitoring, an optional assignment may widen existing gaps. However, when equity is a priority, it can create more opportunities for marginalized students.

Intradistrict optional assignment gives families more control over where their children go to school, which can lead to better matches between students and programs. However, the success of intradistrict programming is dependent on the overall policy design and support systems in districts put into place. School districts that opt into intradistrict school choice must make sure policies are developed that create fair, inclusive, and equitable practices. This includes, but is not limited to, clear communication regarding the process, transportation options for those who need to pursue it, and enrollment priorities that provide all families equal access to school choice (Jabbar, 2015; Phillips et al., 2015).

Understanding how families interact with different types of school choice options is critical to evaluating their effectiveness. The background on the types of school choice, along with their advantages and disadvantages, supports the first research question guiding this study: What factors influence families' decisions to pursue an optional assignment for their child(ren)? By reviewing key factors, including but not limited to families' decisions to pursue optional assignment, family decision-making background, logistical considerations, academic programming, school climate, and perceptions of equity, background on family decision-making can be reviewed. These insights provide a foundation for examining how optional assignment policies shape school demographics and outcomes.

Factors Influencing Families' Decisions to Pursue Optional Assignment

When examining the decision-making processes of families choosing whether to pursue an optional assignment or school choice, a variety of reasons, including practical logistics, family factors, overall academic performance and programming, school climate, and overall perceptions, emerge as significant factors. All factors play a role in families' decisions to choose an optional assignment over their home school and must be considered when reviewing families' school-choice decisions.

One factor that consistently influences families' decisions on school choice is the distance of the school is to a family's home. The location of the school and the time it takes to get their children to and from it each day impact some families' school choice decisions. In a study in New Zealand, Mandic et al. (2017) found that both the actual distance to school and the importance families felt distance was had a strong impact on whether or not they chose to attend an optionally assigned school. Additionally, research performed in the Los Angeles area found that longer commutes made families less likely to pick schools outside of their neighborhood (He & Giuliano, 2018). Edwards (2022a) also found that the longer the commute time, the less likely families were to remain enrolled. These studies support that the commute time to and from school is not just a logistical concern but factors into families' school choice decisions.

Another important factor in school choice decisions is sibling enrollment. Dur et al. (2022) found that when schools consider accepting siblings as part of school choice policy, families experience less stress and are more satisfied with the decision. Their study, which researched Wake County's magnet school system in North Carolina, determined that families tend to prioritize keeping siblings together. When that is not

possible or does not occur, it leads to frustration (Dur et al., 2022). Additional research by Dustan (2018) found that older siblings' school choices often influence where younger siblings want to go, even if they are not in school together at the same time. Together, these findings show that sibling enrollment plays a role in school choice by impacting preferences and helping families maintain consistency and connection within school communities.

When families decide to pursue an optional assignment, they face a dilemma. For families, choosing a preferred choice school might mean longer commutes, greater dependence on transportation, and the potential for greater conflict with parents' work or childcare schedules. When parents' employment hours, childcare drop-off/pick-up constraints, or transportation are complex, they may be less willing to opt into assignments that require additional travel. In these situations, decisions can create a barrier. Families are more likely to choose non-default assignments if the school is reasonably close to their home, work, or childcare (Edwards, 2021).

Another practical yet relational factor is siblings already enrolled in a school. When one child is already attending a school, assigning siblings to the same school becomes more convenient for families and a stronger choice. For example, in a study by Dustan (2018), siblings' prior school assignments influenced younger siblings' school choices. The study found that younger siblings were significantly more likely to apply to and attend the same choice school as their older siblings. An additional study showed that sibling enrollment occurs due to simplified drop-off and pickup logistics, reduced transportation burden, connections with peers and family networks at the same school, and perceived smoother transitions for younger siblings (Mandic et al., 2017). These

studies suggest that families see advantages in having their children attend the same school, so once a choice is made, siblings tend to follow the course.

Other factors influencing families' decisions to pursue optional assignment include academic performance and programming that focus on schools' historic achievements and specialized services. Academic performance appears to correlate positively with the choice of optional assignments. In fact, Hastings and Weinstein (2008) found that, "receiving information significantly increases the fraction of parents choosing higher-performing schools" (p.1373). Other sources also support that high-achieving schools are a key factor in school choice. Often, families have used academic performance as a factor and preference when selecting an intradistrict optional assignment, and research shows that more advantaged parents have stronger preferences for academic performance (Burgess et al., 2015). On the other hand, Hastings and Weinstein (2008) found that low-income families often have less access to achievement data, which affects the weight they place on academic performance when choosing schools. This is a gap that can be reduced when simplified information is provided directly to parents (Hastings & Weinstein, 2008).

In addition to overall academic achievement, specialized services within a school support school choice option for families and students. Jabbar and Lenhoff (2019) found that specialized services are a key component of parental school choice, especially for students with unique learning needs. Specific academic programming or even specialty themes can also play a role in family factors influencing school choice, even within intradistrict options. Other research suggests that parents are interested in finding more effective educational programs that align with their cultural and family values (Prieto et

al., 2019). All in all, although it may not be the most frequent factor influencing family choice, specialized services or programming within a school do affect optional assignment in both inter- and intra-district school choice programs.

Another area to review when focusing on factors influencing school choice selection is the overall school climate and perceptions of the schools. The reputation of a community or within a school plays a significant role in school choice. In fact, a school's environment and climate are understood to be shaped by the people who inhabit it, including students, staff, and families, and their collective interactions and characteristics (Thapa et al., 2013). Because of this, the quality of relationships and sense of community within a school play an important role in families' school choice decisions (Holme, 2002). Parents are interested in finding schools whose student body composition resembles their child's background and identity. This could include, but not be limited to, members of the student body, the administration, and the instructional staff and faculty (Epstein, 2010).

As families consider optional assignments for their children, perceptions of safety often rise to the top as a deciding factor, especially when a school's reputation within the community contributes positively to its overall climate. According to Phillips et al. (2015), safety is consistently ranked among parents' top priorities when selecting schools, sometimes outweighing academic performance. Phillips et al. (2015) research found that parents are more likely to opt out of their assigned neighborhood schools if they perceive them as unsafe, even when academic achievements are comparable. This aligns with other research from the EdChoice Schooling in America Survey, which reported that safety was the most frequently cited reason for switching schools, particularly among

charter and homeschool families (Ritter et al., 2024). Additionally, a study by Yapa et al. (2025) found that positive school climate factors, such as strong teacher-student relationships and a sense of belonging, are directly linked to students' perceptions of safety. This reinforces the idea that safety extends beyond physical security to include social and emotional well-being. These findings suggest that, when selecting a school, school climate and safety are intertwined, showing that families use these indicators as reasons for overall school quality when making intradistrict or other school-choice decisions.

Since cultural fit has already been identified as a consideration in selecting an optionally assigned school, it is important to examine how this factor influences students' overall ethnicities and cultural backgrounds. Research consistently shows that families seek school environments that reflect and respect their cultural values, language, and community identity. For many, this sense of belonging is closely tied to the ethnic and cultural make-up of the student body and staff, as well as the school's approach to inclusivity and representation (Hailey, 2022; Holme, 2002). Interconnected with safety, a factor already discussed, cultural fit supports families seeking schools that offer inclusive efforts for families of diverse racial and ethnic backgrounds (Hailey, 2022). In fact, Hailey (2022) explains that schools that intentionally focus on inclusive environments to support all students and families are more likely to attract families seeking academic rigor, cultural affirmation, and safety. It is evident that cultural competency, coupled with safety, is positively correlated with optional school assignments.

As stated previously, families often consider how well a school's culture and values align with their own when choosing an optional school assignment. Another

potential factor influencing these decisions is how schools market themselves. Due to today's school choice options and overall competitiveness, schools can no longer rely on only academic achievement or culture to attract families; instead, they must actively promote their programs, values, and overall culture and achievements. School choice selections appear to have a multitude of interconnected reasons that families use to determine their child's school. Even marketing techniques can impact a family trying to make a decision. Patel and Harsora (2023) explain that personalized marketing efforts, including emails, mailings, and social media, can significantly influence how connected families feel to a school. In fact, parents reported feeling more connected to schools that communicated directly with them regarding highlights of the school and overall programming, and highlights using this as a way to help their decision (Patel & Harsora, 2023).

When reviewing the research regarding families' decisions for school selection, it is clear that families use several options to help decide on whether or not to utilize a school choice option. Practical considerations like proximity, sibling enrollment, and alignment with family values can play a critical role in overall families' choice (Burgess et al., 2015; Edwards, 2021). Additionally, marketing techniques as well as academic achievement continue to be a part of the overall decision (Hastings & Weinstein, 2008). The research provides evidence that families make choices based on what is available, what matters most to them, the overall school's atmosphere and culture, and their own family dynamics.

It appears that the factors influencing families' decisions to pursue an optional assignment or remain in their assigned neighborhood school are both practical and

personal. Families review trade-offs between access, logistics, and the learning climate they believe will best support their child and their entire family. Unfortunately, the research also highlights a concern that not all families have equal access to school choice information, the means and ability to complete the enrollment, or transportation needed to take advantage of school choice opportunities (Holme & Richards, 2009; Ritter et al., 2024). These limitations can unintentionally reinforce existing or create additional inequalities among marginalized families.

Overall, parents' perceptions of school quality, belonging, and safety appear to carry as much influence as measurable academic outcomes. For schools focused on using optional assignments to attract families to their schools, it is essential to recognize that reputation, communication, and relationships matter as much as programs and test results (Holme, 2002). By understanding the variety of factors that influence parental decision-making, educators and district leaders can develop policies that support equitable, responsive school choice systems that meet the diverse needs of all families.

To take a deeper look into factors impacting optional assignment, the following section examines the demographic patterns of families who request optional placements. It will explore how socioeconomic status, race, and other demographic variables interact with access and opportunity within school choice systems.

Demographic Patterns of Families Requesting Optional Assignment

Demographic factors to consider when reviewing families pursuing optional school assignment programs include race, socioeconomic status, and educational opportunity. As school choice policies have expanded across the United States, research shows that school choice programs often reflect and reinforce existing social stratification

(Roda & Wells, 2013). Because of that, the demographics and their intersectionality should be reviewed and explored.

Families from higher-socioeconomic backgrounds, particularly white and Asian families, are often overrepresented among those pursuing optional assignments or choosing to leave their neighborhood school. These choices, however, reflect more than individual preferences. They are part of a system shaped by deeper structural forces, including historical segregation, district zoning and attendance-boundary practices, and uneven access to information and resources (Konrath, 2021; Phillips et al., 2015). As Orfield and Frankenberg (2013) explain, school choice programs often overlook the ways society is unequal. Because of this, they can fail to be fair, since not all families have the same ability or resources to take advantage of the options available. Their research shows that to really understand how school choice affects fairness, one must examine the racial and economic backgrounds of families who use optional assignments (Orfield & Frankenberg, 2013). Without that, it is hard to tell if these policies are helping make things more equal or making existing gaps worse. This information must be considered as policymakers develop or revise policies so that all students, regardless of background, have a fair chance to learn in inclusive, diverse, and welcoming schools.

Orfield and Frankenberg (2013) argue that while school choice is often promoted as a tool for equity, it can deepen inequality when not carefully designed. Their research shows that charter schools and other choice-based models, including intradistrict school choice, frequently lead to increased racial and economic segregation, especially when families with more resources are better positioned to navigate the system. The authors explain how choice policies, when implemented without safeguards, tend to benefit

already advantaged groups and leave behind students of color and those from low-income families (Orfield & Frankenberg, 2013).

Reviewing the impact of residential segregation on school demographics is critical when researching school choice efforts and policies. Orfield and Frankenberg (2013) found that residential patterns, which are closely linked to race and income, often lead to schools having the same divisions and concerns. Because of this, intradistrict school choice can be challenging to manage when creating policies to promote equity and inclusion. These findings suggest that without intentional policy design and oversight, school choice can unintentionally reinforce the very inequalities it aims to solve.

School choice policies are designed to give families more control over their children's education, but many face significant access and barriers. Unfortunately, access to school choice is not equitable across racial and socioeconomic groups, as logistical barriers often prevent underserved families from fully participating in school choice programs (Houston & Henig, 2023; Jabbar & Lenhoff, 2019).

For certain racial and socioeconomic groups, one significant barrier is transportation. Families who do not have access to a car or reliable public transportation will often face significant challenges when trying to enroll their children in schools outside their neighborhoods due to a lack of public school district offerings. However, Edwards (2022b) found that providing transportation support can significantly improve attendance for students from low-income families and can even reduce chronic absenteeism. Mandic et al. (2017) also showed that students attending schools farther from home are less likely to walk or bike, which can impact both their attendance and overall health, especially if there are no other transportation options available. This

makes it clear that transportation is a genuine equity concern and must be considered as a barrier when reviewing school choice and intradistrict optional assignment.

Another challenge is that school choice systems can be confusing and complicated to navigate. Jabbar and Lenhoff (2019) found that families in underserved communities often struggle with online enrollment tools that require digital literacy, time, and an understanding of online application requirements. Although some districts provide community engagement tools that can help families better understand changes to school boundaries, many families still feel left out of the decision-making process or do not understand it (Overney et al., 2025). This can create a situation where families who are most in need of guidance are the least able to access it. Without clear communication, personal support, and resources to assist, families may miss out on opportunities simply because the school choice system application is too complicated to navigate and complete. Unfortunately, this only widens existing inequities in school access.

A third barrier is access to before- and after-school care for students and their families, which is often a deciding factor for working families. Jabbar and Lenhoff (2019) found that the limited availability of extended before and after-school programs disproportionately impacts low-income families, who may be unable to choose schools that do not offer flexible hours. This issue is often overlooked in policy discussions at the state and district levels, even though it plays a crucial role in whether a school is truly accessible to any family that wants to attend. Together, these barriers show that school choice is not just about having options; it is about whether families can realistically act on those options.

While the barriers outlined above present a variety of equity concerns, they also

point toward solutions that policymakers must consider. Orfield and Frankenberg (2013) stress that when districts proactively address accessibility challenges through investments in transportation and other services like extended-day programming, school choice can reduce racial and economic isolation while improving academic outcomes. The real difference is not whether families have school options; instead, it is about how those options are set up and supported. More research is needed to identify which specific policy designs and types of support most effectively balance equitable access, ensuring that school choice serves all families rather than reinforcing existing advantages. Understanding how school choice policies are designed and supported is only part of the picture; it is equally important to examine who is actually using these options by reviewing the types of families requesting optional assignments.

Racial and Socioeconomic Disparities in Optional Assignment Participation

The families who choose optional school assignments often come from different racial and income backgrounds, showing that not everyone has the same access to these school choice opportunities. Research reveals that families from higher-income backgrounds and White racial groups are significantly more likely to review and choose school choice options, including intradistrict optional assignment, than their lower-income and BIPOC (Black, Indigenous, and People of Color) counterparts (Roda & Wells, 2013). In fact, school composition plays a critical role in shaping achievement outcomes and parental choice (Phillips et al., 2015). In their research, Phillips et al. (2015) found that White students typically attend schools with lower Black student density, while Black students attend schools with higher Black student density. Konrath (2021) explained that families with greater resources and access to information are more

likely to navigate optional assignment systems successfully, and this can lead to increased segregation across and within districts. This study of intradistrict choice in a mid-sized urban district found that BIPOC students and economically disadvantaged students were often disproportionately underserved (Konrath, 2021).

Frankenberg et al. (2011) found that charter schools tend to be more racially isolated than traditional public schools, especially in urban areas. According to them, this type of racial separation does not happen by accident; instead, it appears to be part of a bigger pattern where families tend to choose schools with others like themselves. Unfortunately, due to underlying barriers, not everyone has the same access to make those choices.

In a Pennsylvania-based study, Kotok et al. (2017) found that Black and Hispanic students transferring to charter schools often ended up in more racially isolated environments than the public schools they left. Meanwhile, White students tended to transfer into schools with higher proportions of White peers, suggesting that racial composition plays a significant role in school choice decisions, whether it is intra- or interdistrict choice. Frankenberg et al. (2011) also emphasize the importance of intentional policy design. Without equity-focused frameworks, school choice systems could worsen existing disparities. These studies underscore the need to examine optional assignment policies through an equity lens and to include intradistrict models in the studies. School choice policies appear to support access and flexibility for families; however, past research indicates they can inadvertently lead to segregation unless explicitly designed to address it.

While demographic research on who is most likely to engage in optional

assignments reveals who is most likely to do so, it also highlights systemic issues that can impact access for marginalized families and children. The ability to choose a school is simply not equal for all families in a district. Families from marginalized backgrounds often face significant obstacles and barriers when attempting to participate in school choice programs, even within their own districts (Jabbar & Lenhoff, 2019; Orfield & Frankenberg, 2013). These barriers, including but not limited to transportation limitations and complex application procedures, can prevent equitable access and reinforce existing disparities (Orfield & Frankenberg, 2013).

As stated earlier, transportation remains a critical barrier to equitable school choice. Edwards (2022a) explains that finding ways to provide transportation for all families interested in optionally assigning can increase attendance rates and reduce chronic absenteeism. This holds for all parties, including economically disadvantaged students. These findings suggest that a lack of transportation for school choice disproportionately affects low-income families, thereby limiting their ability to participate in optional assignment programs. Mandic et al. (2017) support this research regarding transportation barriers. Their study in New Zealand highlights how limited access to safe, reliable, and affordable transportation can restrict students' ability to attend schools outside their immediate neighborhoods.

In addition to transportation, the complexity and accessibility of school choice options must be considered. Optional assignment practices intended to support desegregation may become a barrier for families due to the difficulties of the application process. Jabbar and Lenhoff (2019) found that families struggle to understand the application process, deadlines, and school-choice criteria, leading to missed

opportunities. This lack of clarity disproportionately affects families with limited educational backgrounds, language barriers, or minimal access to digital resources.

Konrath (2021) similarly found that families with greater knowledge are more likely to successfully navigate intradistrict choice systems, while marginalized families often face confusion and frustration. Together, these studies highlight how even well-intentioned school choice policies can unintentionally exclude the very families they aim to support.

On top of the challenges families face when navigating school choice, another big issue is whether schools offer extra services, such as before and after-school care. These services are often essential for working-class families and single-parent households, who rely on care outside standard school hours to maintain employment. Jabbar et al. (2025) argue that access to these programs significantly influences school choice decisions, as families may avoid schools that lack before and after-school care even if those schools offer stronger academic programs or other specialty programs. Frankenberg and Siegel-Hawley (2013) state that without intentional equity measures embedded in school choice policies, such as transportation and before and after-school access, disadvantaged families are left to navigate a system that favors those with greater resources and flexibility. Their research shows that the absence of supportive services not only limits access but also reinforces patterns of segregation and inequality, as families with fewer options are effectively excluded from participating in the full range of school choices available. This shows we need to learn more about how extra school services, such as before- and after-school care and transportation, affect how families make school choices, especially within the same district. That way, policies can better meet the needs of all families.

The literature reviewed thus far shows that school choice is shaped by a mix of factors, including who is choosing it, the obstacles they face, and how the system is set up. The research supports that families from higher-income and White backgrounds are more likely to navigate these systems successfully. In contrast, marginalized families face challenges related to transportation, digital access, and extended care services. These differences not only influence individual family decisions but also have larger implications for school demographics, resource distribution, and academic outcomes. As optional assignment policies continue to evolve within districts and across other school choice programs, it becomes increasingly important to understand how these choices affect schools themselves. This leads to the final area of inquiry: the impact of optional assignment on equity, academic performance, funding, staffing, and community perceptions.

Impacts of Optional Assignment on Schools

The concept and approach to optional assignment for students attending interdistrict and intradistrict public schools not only affect every family who considers the choice, but also how entire school systems operate. When families choose schools outside their assigned zones, whether it be to a different intradistrict school or an alternative school such as a magnet, charter, or interdistrict choice, it can shift the demographic makeup of students in each building. Knight and DeMatthews (2024) found that these shifts can impact everything from classroom sizes to how resources are spread across schools. One, if not the most major concern, is equity. Frankenberg and Siegel-Hawley (2013) explain that when school choice is not carefully managed, it can lead to schools becoming more segregated by race and income. This means some schools end up

with mostly White or wealthier students, while others serve primarily students of color or those from lower-income families. Ryan (2013) adds that this kind of separation can make it harder for schools to offer equal opportunities to all students. For states and schools developing policies for school choice, these facts must be taken seriously, and research on the impact of school choice should continue. Not only does equitable oversight need to be reviewed and understood, but the impact on academic outcomes and potential segregation must be considered.

As noted earlier, families often select a school due to the positive academic outcomes they see. Deming (2011) found that students who attend schools through choice programs sometimes perform better, but the benefits are not the same for everyone. Oftentimes, students from families with more resources gain more, while others may not see the same improvements. This is partly because families with higher income and education levels are more likely to choose schools with stronger academic reputations and better support services (Deming, 2011). Siegel-Hawley (2016) adds that these families also tend to have more access to information and flexibility. This allows them to take full advantage of school choice options and also receive support at home. As a result, academic gains from the optional assignment may reflect existing inequalities rather than reduce them. This reinforces the need to study how optional assignment policies affect not only individual students but also entire school communities, especially in districts that permit intradistrict choice.

Another consideration to review regarding the overall impact of the optional assignment is funding and resource allocations, as well as potential demographic and enrollment shifts when students move between schools. Campos and Kearns (2023)

found that schools with fewer students often experience financial losses or instability. This can affect staffing, programs, and materials. When this happens and people realize the differences, schools with fewer resources become less attractive, leading to even more families leaving and choosing a different school. Jabbar (2015) found that in competitive school environments, leaders often respond to enrollment pressures by reallocating resources toward marketing and recruitment rather than academic improvement, especially when funding allocations are tied directly to student numbers. Edwards (2022b) adds that transportation costs, especially in districts with high rates of school choice, can strain budgets, forcing schools to move funds from instructional services to cover increased bus runs and other transportation needs. Additionally, staffing and enrollment can also be impacted by school choice. When student numbers change, schools may need to adjust the number of teachers or the placement of senior staff to meet federal, state, or district requirements (Jabbar, 2015). This can lead to uneven staffing across the district, which affects both students and teachers.

Community perceptions of schools matter as well when it comes to the impacts of the optional assignment. Holme (2002) found that families often judge schools by reputation rather than performance, relying on social networks and community perceptions rather than objective academic data. If a school is perceived as less desirable, it may struggle to attract students, even if it offers strong programs. Jabbar (2015) adds that when schools compete for students, principals may focus more on promoting their school than improving academics. Frankenberg and Siegel-Hawley (2013) also point out that schools with mostly low-income or minority students can be unfairly judged when their achievements and culture are reviewed, which makes families less likely to choose

them. These perceptions can lead to uneven enrollment and make it harder for some schools to thrive, even when they are doing good work.

Finally, keeping enrollment stable is a significant concern. When students frequently transfer between schools due to school choice or other factors, it can disrupt their learning, the consistency of the school and classroom, and overall school resources. Frankenberg et al. (2011) argue that such mobility, particularly when driven by inequitable choice policies, can increase segregation and negatively affect equity. Teachers may need to spend extra time helping new students catch up, while classroom routines and group dynamics can suffer from constant change. Frankenberg and Siegel-Hawley (2024) explain that such instability, often driven by demographic shifts and school choice policies, can impact school resources and disrupt school and classroom community cohesion.

After reviewing the research, it is evident that factors such as funding, teacher staffing, student performance, and community attitudes toward a school can be influenced by the rules and decisions of districts, states, and the federal government. Optional assignment policies, whether intra- or interdistrict, magnet, charter, or vouchers, can have wide-ranging effects, especially when families with more resources are better able to take advantage of them. Understanding why families choose optional assignments, who makes those choices, and how those choices impact schools is essential to understanding their impacts. More research on the factors influencing family decisions, the demographic patterns of students opting for these assignments, and the broader effects on school demographics and academic outcomes can help districts make informed decisions about intradistrict school choice. Additionally, gaining more information can

help guide equitable enrollment practices, ensure proper resource allocation, and support academic success for all schools.

Summary

To understand how families make school choices, it is important to look at what motivates them, how demographics play a role, and what happens at the school level when those choices are made. Families make school choices based on what they believe will give their child the best chance at success. This often includes looking at academic programs, school reputation and culture, location, and the overall climate of the school. Manski (1992) introduced the idea that parents act as rational decision-makers, trying to make the best choice even when they do not have all the facts. More recent research by Lievore and Triventi (2022) explained that families from different backgrounds approach these decisions differently. They reminded us that wealthier families may feel comfortable choosing a school that's farther away or more competitive, while families with fewer resources may prioritize stability and proximity.

Building on that, it is clear that race and income influence how families engage with school choice. Lievore and Triventi (2022) found that social background impacts how families see the risks and rewards of different schools. This matters when we look at who is requesting optional assignments and how those requests compare to the makeup of zoned schools. Not all families have the same access or confidence to navigate the application and enrollment system, and this, too, can lead to uneven participation.

These individual choices add up and can have a significant impact on schools and communities. When families with more resources consistently opt out of their neighborhood schools, this reflects a broader pattern of social reproduction in which

schools serve as a mechanism for causing rather than reducing social inequalities (Collins, 2009). This pattern does not just reflect existing inequality; it can actively deepen it, causing some schools to thrive in a multitude of ways while others struggle. Research shows that without intentional safeguards, school choice policies tend to benefit already advantaged families while leaving behind students of color and those from low-income backgrounds (Orfield & Frankenberg, 2013).

With these findings in mind, it is clear that district leaders have a lot to consider when shaping intradistrict school choice policies. Intradistrict school choice can offer real benefits like more diverse school environments and parent satisfaction, but it also comes with challenges such as transportation, access to all, and keeping equitable systems in all schools. Manski (1992) and Orfield and Frankenberg (2013) both stress the need for policies that are fair and easy to navigate so that all families have access if they choose.

Given these findings, district leaders face a complex challenge when developing and reviewing intradistrict school choice policies. While optional assignments can offer benefits such as increased parental satisfaction and, in some cases, more diverse learning environments, the research consistently shows that these benefits are not equally accessible to all families. Transportation barriers, challenging application and enrollment systems, and unequal access to information create significant obstacles for underserved communities (Jabbar & Lenhoff, 2019; Orfield & Frankenberg, 2013).

To address these inequities, districts must do more than provide families with options; they must also make sure everyone has a chance to use those options. This includes providing transportation (Edwards, 2022b), simplifying application and enrollment processes (Jabbar & Lenhoff, 2019), offering support and outreach for

families, and making sure services like extended-day programming are available (Orfield & Frankenberg, 2013). It is essential to include families from all backgrounds in policy development as a way to ensure their needs are heard and understood. Even with these interventions, research suggests that the success of school choice in promoting equity rather than undermining it depends heavily on careful oversight, development of intentional policy, and a commitment to monitoring demographic and academic outcomes across all schools (Orfield & Frankenberg, 2013). The question is not simply whether to offer choice, but whether districts can design and resource systems that truly serve all students equitably.

CHAPTER III

Methodology

Chapter III provides an extensive overview of the research methodology employed in the study of the potential impact of intradistrict school choice policies in public schools and builds upon the background from Chapters I and II. School choice policies are designed to give all families equal access, but as Chapter II explored, that is not always how these policies play out in practice. Drawing on Manski's (1992) Rational Choice Theory and Bourdieu's (1986) Social Reproduction Theory, the research provided background on how families weigh and consider schooling options, with Bourdieu's theory exposing why those options are never equally distributed. This chapter builds on those theoretical foundations and moves into the design and methodology outlined in this chapter. While Chapter I provided an in-depth introduction to the Capstone project, Chapter II provided a comprehensive review of existing literature surrounding intradistrict school choice, equity implications, and how optional assignment policies function in districts across the country. This research helped to establish a broader research context that frames the project.

The research questions for this study shaped the methods used. A single approach was insufficient, and what follows describes the combination used. The chapter explains how the study was specifically designed and conducted with the State College Area School District (SCASD). SCASD has a long-standing practice of allowing parents to apply for an intradistrict optional assignment for their elementary child. In fact, for at least 20 years, similar procedures have been in place for parents of elementary-aged students who wish to apply and be accepted for an optional assignment. The district

originally implemented its optional assignment policy to support family choice. This process, however, may unintentionally contribute to shifts in student and school demographics, elementary school enrollments, and academic achievement, as well as potential equity disparities across its elementary schools.

To fully investigate these areas, this chapter begins by describing the study's purpose: to examine the impact of the optional assignment policy on families, students, and schools in SCASD. The research questions flow from there and are each tied to a specific dimension of that problem and to the mixed-methods design built to address it. The chapter continues by providing explicit information about the setting and participants, allowing the reader to understand the background and context in which the study takes place. This will include background and characteristics of SCASD's eight elementary schools involved in the research. As Willie et al. (2002) found, the actual implementation of school choice regulations occurs at the district level, where the research must consider local demographics, school capacities, and community priorities. Following the setting and participation information, the research plan articulates how it connects to the knowledge found in the literature review. This plan will describe in detail the specific steps taken to investigate the optional assignment policy and how those steps respond to the gaps and themes that emerged from existing research on school choice and equity, including the need to examine who pursues optional assignments, what barriers families face, and how intradistrict choice affects school demographics and resource distribution (Campos & Kearns, 2023; Konrath, 2021; Phillips et al., 2015).

Next, a detailed description of the research methods and data collection procedures used for the study is explained and the research approach is discussed. A

mixed-methods approach was chosen because school choice research consistently requires methods that can capture both quantitative demographic patterns and the qualitative experiences of families navigating school choice systems. (Jabbar & Lenhoff, 2019; Robertson et al., 2022). It also describes the data collection methods and procedures, the timeline and plan followed to complete the research, and the data collection process. The researcher explicitly describes the data collection tools and acknowledges IRB approval. Finally, this section of the chapter provides fiscal information related to the research method and data collection.

Finally, this chapter addresses validity and describes the specific types of validity prioritized in this study, as well as the methods used to strengthen them. Triangulation of data sources was central to that process, particularly to ensure that the experiences of families who face barriers to participation were not lost in the findings. (Konrath, 2021; Orfield & Frankenberg, 2013). The chapter concludes with a summary of the methodological decisions made and transitions to Chapter IV, where the collected data will be analyzed and the findings presented.

Purpose of the Study

The primary purpose of this mixed-methods study is to examine the impact of the State College Area School District's (SCASD) optional assignment policy on families, students, staff, and elementary schools across the district. As the literature review in Chapter II explained, intradistrict school choice policies have both benefits and challenges. Research found that in some districts, implementation of an optional assignment process helped expand access and improve student outcomes. In other districts, however, it unintentionally reinforced patterns of segregation or resource

imbalance (Campos & Kearns, 2023; Orfield & Frankenberg, 2013). Orfield and Frankenberg (2013) explained that understanding whether school choice policies are equitable requires examining both the racial and socioeconomic backgrounds of families who use them and the outcomes across schools. This dual focus directly informed the decision to use a mixed methods design for the project. This study examines whether these patterns hold in SCASD.

To accomplish the objectives of this study, the researcher employed a mixed-methods approach integrating qualitative and quantitative methods to provide an in-depth understanding of the optional assignment policy's overall impact within SCASD. The qualitative component examines parents' perceptions of school choice by analyzing three years of open-ended parent responses to the district's optional assignment application. This data will help identify the key factors driving families' decisions to seek placements outside their designated attendance zones within the district. The quantitative components analyze student-level demographic data, enrollment trends, staffing allocations, per-pupil expenditures, and academic performance data across all eight elementary schools. This data will help to identify measurable patterns and disparities that may be connected to optional assignment practices.

The desired outcomes of this capstone research project are to provide SCASD with data-informed, actionable insights that allow district leaders to evaluate whether the current optional assignment policies and procedures promote equitable access and outcomes for all students, or whether they inadvertently create disproportionality across the eight district elementary schools. The findings from this study are intended to guide future policy review and considerations, enhance district communication and planning,

and ensure that all eight elementary schools within the district provide equitable opportunities for all students and families.

Research Questions

The capstone research project is guided by three research questions that directly align to examine the impact of SCASD's optional assignment policy on families, students, staff, and elementary schools. The research questions that guide this study are as follows:

1. What factors influence families' decisions to pursue an optional assignment for their child or children?
2. How do the racial and socioeconomic demographics of elementary students requesting an optional assignment compare to the demographics of the zoned elementary schools?
3. How does the optional assignment policy impact the demographics and academic outcomes of the elementary school buildings?

Research question 1 uses qualitative research to examine perceptions and to understand the motivations and decision-making processes that families use to seek and determine an optional assignment outside their designated attendance zone. Understanding these perceptions is critical to understanding the human experience, the thematic reasons for the optional assignment, and the background and context for interpreting the quantitative demographic and building-level data, which is an additional part of the study.

Research question 2 aligns with the quantitative strand of the study. It directly supports the purpose of determining whether the optional assignment policy

disproportionately impacts certain student groups. Comparing the demographics of students from families who pursue optional assignments with those enrolled in their neighborhood or zoned schools will help assess whether the policy is creating or contributing to demographic imbalances across the eight elementary schools within SCASD. For this analysis, the null hypothesis assumed that no statistically significant difference existed between the racial distribution of optional assignment applicants and the district's overall student population. Socioeconomic patterns were examined descriptively but were not subject to a formal hypothesis test.

Research question 3 also aligns with the quantitative strand and supports the purpose of evaluating the policy's overall impact on equity and access across the district. The question helps examine how the optional assignment policy influences the demographic makeup of each of the eight elementary schools and each school's overall academic performance. Together, those patterns will show whether the policy is widening gaps across the elementary schools or working appropriately.

Two null hypotheses guided the quantitative analysis for this research question. For the one-way ANOVA examining building-level academic performance, the null hypothesis assumed that no statistically significant difference existed in mean PSSA or MAP scores across the eight elementary schools. For the independent samples t-tests comparing optional assignment and non-optional assignment students, the null hypothesis assumed that no statistically significant difference existed in academic performance between the two groups. A significance threshold of $\alpha = .05$ was applied to all tests, meaning a finding needed less than a 5% chance of occurring by random chance before

the null hypothesis could be rejected.

The interconnectedness of the three questions provides a comprehensive framework for understanding the causes and potential unintended consequences of intradistrict optional assignment within SCASD. The data and analysis from these questions help to form the foundation for the research plan and data collection procedures described throughout this chapter.

Setting and Participants

Setting

The research for this capstone project was completed entirely within the State College Area School District (SCASD). SCASD is considered a suburban school district and is the only medium-sized district in Centre County, Pennsylvania. The district enrolls students from an attendance area of over 150 square miles, comprising the Borough of State College and the surrounding townships of Benner, College, Ferguson, Halfmoon, Harris, and Patton. A key feature of the district is the presence of the University Park Campus of Pennsylvania State University (PSU). This university is considered the hub of State College, Pennsylvania, and is a very connected component of the area. PSU is a major research university, which significantly shapes the district's demographics and policies. PSU's demographics contribute to a diverse, highly educated community that includes faculty, graduate students, university staff, and long-term community residents. Whether intended to or not, PSU and the surrounding community help to shape the educational environment of SCASD and provide important background for understanding the optional assignment policy in State College and the families who apply for school choice.

According to the Pennsylvania Department of Education's Future Ready PA Index (n.d.), SCASD serves approximately 6,800 students from kindergarten through grade 12. The district's student population comprises 75.9% of students who identify as white. The remaining student populations represent a minority enrollment of 24.1%, including 9.1% identifying as Asian, 7.5% identifying as two or more races, 4.6% Hispanic, 2.7% Black, and less than 1% Native Hawaiian or other Pacific Islander.

At the elementary level, SCASD has eight community elementary schools, with enrollments ranging from approximately 225 to 450 students. The eight elementary schools feed into two middle schools: four serve the Park Forest Area, and the other four serve the Mount Nittany area. These two middle schools feed into State College Area High School, which serves students in grades 9-12. In addition to these schools, the district has one democratic alternative middle/high school serving selected students in grades 6-12. One final component is that the district has an in-house virtual academy for grades K-12 and services both full-time students and students who take one-off virtual courses.

Each elementary school is assigned an attendance zone, and families residing within those zones are enrolled at their neighborhood school. However, the district's optional assignment policy permits families to apply to attend any of the other elementary schools outside their designated attendance zone, and this is the focus of this study. Currently, all eight elementary schools have students who have optionally assigned from a different school, with some elementary schools enrolling a higher percentage than others.

The eight district elementary schools vary in size, demographic composition, and

geographic location within the 150-square-mile area. Some schools, such as Radio Park, Corl Street, Park Forest, and Easterly Parkway Elementary, are located in more densely populated areas closer to the university, and all are ESL hubs. Other schools, such as Ferguson Township and Gray's Woods Elementary, serve more rural parts of the district. The differences in location, size, demographic makeup, and resource distribution make the capstone study, focused on optional assignment patterns across all eight schools, relevant to understanding equity within the district.

Participants

Students. The students enrolled in SCASD serve as the primary participant group for this study. Specifically, the study focuses on elementary-aged students from throughout the district who are optionally assigned to a school building other than their designated neighborhood school. This group of students is the focus of research questions 2 and 3. The researcher used this group of optionally assigned students to examine whether the demographics of students pursuing optional assignments differ from those enrolled in their zoned neighborhood school, and whether the optional assignment policy influences the demographic makeup of academic outcomes of the eight elementary buildings within the district. Phillips et al. (2015) found that intradistrict choice can shift the racial, ethnic, and economic composition of schools. This fact makes it critical to examine who is requesting optional assignments and how those requests compare to the overall enrollment patterns of each building. Across the three school years included in this study (2023-24, 2024-25, and 2025-26), SCASD's eight elementary schools enrolled an average of approximately 2,825 students per year across the three-year period. SCASD's eight elementary schools approved 164 optional assignment requests for

students in grades K-5. The number of requests varied across buildings, with Radio Park receiving the highest number of requests over the three years, followed by Easterly Parkway Elementary and Corl Street Elementary. Spring Creek Elementary and Ferguson Township received the fewest requests over the three-year period. These differences make it essential to include in the analysis of research questions 2 and 3 and provide context regarding how the optional assignment policy functions unevenly across the eight elementary schools. Student demographic data, including race, socioeconomic status, and academic performance indicators, was collected and analyzed at the building level to address these questions and assess whether the optional assignment policy contributes to the inequitable distribution of students and academic opportunities across the district.

Parents. Parents and guardians of elementary-aged students from SCASD make up the second participant group in this study. Data from this group address research question 1, which examines the factors influencing families' decisions to pursue an optional assignment within the district but outside their designated attendance zone. Because this question is qualitative, data from parents and guardians provide the perceptions and decision-making narratives necessary to understand the context behind their reasons for choosing a different school. Research has found that families consider a variety of factors when making school choice decisions, including, but not limited to, academic programming, school climate, proximity, sibling enrollment, and access to before- and after-school care (Campos & Kearns, 2023; Edwards, 2021). However, it is important to consider that not all families utilize optional assignment processes equally. In fact, those with greater resources, information, and flexibility are more likely to successfully pursue optional assignments (Konrath, 2021; Robertson et al., 2022).

Gathering qualitative perception data from parent applications will help connect the quantitative demographic findings from research questions 2 and 3. This information will also allow for a more complete understanding of how the optional assignment policy functions across a diverse representation of family experiences within SCASD.

Research Plan

The research plan for this study addresses the gaps and themes identified in the literature review and the three research questions guiding the capstone project. As the literature in Chapter II established, understanding the full impact of intradistrict school choice requires studying both the human experiences of families who use the process and the measurable demographic and academic outcomes resulting from it (Jabbar & Lenhoff, 2019; Konrath, 2021). Relying on a single approach would not capture the entire picture, which is why a mixed-methods design was the most logical choice for investigating the optional assignment policy within SCASD.

Central to the research plan is SCASD's Optional Assignment Policy, which governs how families request placement at a school outside their designated attendance zone. This policy is neither an actual Board Policy nor an administrative regulation, yet it reads like a policy and has historically served as guidance for families and the administration. Found on our district website under the Registration/Enrollment section, this "policy" serves as the foundational document in shaping the research design. Its specific conditions directly informed the research questions and the data collection procedures selected for the student. The *SCASD Optional Assignment Policy* is presented in its entirety below:

OPTIONAL ASSIGNMENT POLICY

Optional Assignment Requests

Each elementary and middle school has an associated attendance area. Students enrolling in kindergarten through 8th grade are assigned to a school based on the attendance area in which they live. If a family would like their child to attend a different school than the one in the attendance area in which they live, they must request this by submitting an Optional Assignment Request to the Registration Office.

Below are several scenarios where an optional assignment request may be appropriate.

Family Moves to Different Attendance Area

When a family moves from one attendance area to another within the district, the child will be transferred to the school serving their new attendance area. If the family would like the child to remain at the original school, they must file an Optional Assignment Request, asking for the child to remain at the original school for the remainder of the current school year, or for the remaining grades in the original school. Proof of residency at the new address must accompany the request.

Family Moving to Different Attendance Area After School Year Begins

If a family moves from one attendance area to another within the district after the school year begins, and the family does not want the child to have to transfer schools when they move, they can file an Optional Assignment Request before the school year starts, asking that the child initially be assigned to the second

school. A copy of the sales agreement or lease agreement for the new residence must accompany the request, but the only pages needed are those showing the parties to the sale or lease, the address of the residence, the effective date of the sale or lease, and the signatures of the parties. If the request is for a home under construction, a letter from the builder verifying the completion date of the home is required.

Family Wants Child to Attend a Different School

If, for any reason, a family wants the child to attend a school other than the one serving the attendance area in which they live, they must file an Optional Assignment Request.

The granting of an optional assignment request is subject to the following conditions:

- School bus transportation is only provided to the school serving the attendance area in which the student lives. Families are responsible for providing transportation to and from the requested school.
- Once a student is assigned to the requested school, that school becomes the student's assigned school. Consequently, if the family wants to have the student attend a different school before the term of the optional assignment is finished, another optional assignment request must be submitted.
- The granting of an optional assignment request is contingent upon "space available" in the requested school. The decision on an optional assignment request that is submitted before the start of the school year may not be

made until sometime in August, before the start of school. (State College Area School District, n.d.)

As the policy illustrates, the optional assignment policy allows families to submit an Optional Assignment Request to the district's Registration Office, with placement contingent upon available space at the desired or requested school. A key point of the policy is that it requires families to provide their own transportation to the school to which they are optionally assigned. The district busing service is available only to the school serving the student's home attendance area. There are no equity guidelines built into the policy, no selection priorities, and no outreach provisions for families who may face barriers.

These conditions directly shaped the research plan. Transportation alone, for instance, has been identified as a major barrier to participation in school choice for families without reliable access to a vehicle (Edwards, 2021; Mandic et al., 2017). This concern raises the question of whether families without reliable transportation may be excluded from participation, regardless of their interest in seeking an optional assignment. Additionally, the acceptance or denial regarding space availability requires reviewing whether certain schools are more frequently requested than others and whether those historical patterns reflect demographic disparities across the eight elementary schools. An additional condition that helped to shape the plan was the absence of equitable guidelines. Research supports that marginalized families struggle to successfully navigate school choice systems without intentional support structures (Konrath, 2021; Orfield & Frankenberg, 2013). These policy requirements helped shape the research questions guiding this research and the data sources and methods used to

study them.

The research plan connects two components in the mixed-methods study. It first addresses Question 1 by examining three years of open-ended parent responses from SCASD's optional assignment request applications. The responses will provide specific insight into the motivations, perceptions, and decision-making processes of the families who have applied for optional assignment in SCASD. This qualitative data provides background and detail to interpret the quantitative questions in research questions 2 and 3. From there, the two strands work together. These two strands will aim to provide a comprehensive, cross-verified understanding of how the SCASD optional assignment policy functions within the district and whether it contributes to inequitable patterns across the district.

The plan is also developed with the understanding that not all families have the same ability to participate in optional assignments in districts that allow them, and that real barriers can prevent some families from accessing or even pursuing this option. Phillips et al. (2015) and Orfield and Frankenberg (2013) found that families with greater resources and flexibility consistently navigate these systems more successfully, and those with fewer resources do not even begin the process. By completing a mixed methods review, the research plan aims to identify who is using the optional assignment and what that participation means for equity within schools and across the district.

Research Methods & Data Collection

The researcher obtained IRB approval in August 2025, received the support of the superintendent of SCASD, and did not collect any data prior to that approval (Appendix A). The study received an exempt determination because all data already existed within

district systems. Optional assignment applications, student demographics, and academic records are already housed within the district registration office and student information systems. All data was handled in accordance with SCASD's established student data privacy policies.

The research method used in this study is a mixed-methods approach. It utilizes interconnected qualitative and quantitative data to provide a deeper understanding of the optional assignment policy's impact within SCASD. Research explains that mixed-methods research is valuable because often a single data source is insufficient to fully address a research problem, and that integrating both data types produces a more complete picture than either approach alone (Creswell & Plano Clark, 2018). This design was chosen because the three research questions collect different data types that, when analyzed together, provide a fuller picture of the policy's impact. The qualitative question will examine the human experiences and perceptions behind families' decisions to pursue optional assignments, and the quantitative questions will provide insights into patterns in demographics, enrollment, staffing, and funding, including academic funding, within the district's elementary schools. Combining all data sets provided an interconnected inquiry of intradistrict school choice and its potential equity implications within SCASD.

The data collection procedures for this study were planned and prepared in a timeline to ensure that each research question was carefully reviewed and analyzed in sequence, so that findings from one strand could inform those from the other (Appendix B).

To specifically address Research Question 1, qualitative data were collected through a review of three years of existing optional assignment applications submitted to

SCASD's Registration Office and approved by both the building principal of the choice school and the Assistant Superintendent of Elementary Education. SCASD's optional assignment application includes an open-ended response section in which parents describe their reasons and circumstances for requesting their child attend a school other than their neighborhood school. Responses collected through the application process were analyzed to identify common themes regarding the parents' or guardians' choices. All student and parent information was de-identified prior to the analysis. Each student was assigned a unique number to enable accurate tracking across datasets without revealing individual identities. No identifying details from individual applications were used in the reporting.

The data collection method was selected because it provides explicit information and insights into families' motivations and decision-making processes in their own words, making additional data collection instruments or participant recruitment unnecessary. The responses collected were submitted as part of an existing SCASD process and, as a result, reflect authentic parental reasons over three years, and enabled the identification of patterns and trends over time rather than at a single point in time. Thematic coding grouped responses into categories, and frequency analysis identified the most common themes. Charts and tables visually represent the frequency distribution of identified themes across the three years.

Quantitative data were collected from SCASD's student information system to research and analyze questions 2 and 3. Student-level demographic data, including race and socioeconomic status, was collected and organized into a data collection sheet. Prior to analysis, all student names and identifying information were redacted. Each student

was assigned a unique number, which allowed demographic data to be cross-referenced across data sets and merged with the perception data from Research Question 1. This meant no data could be traced back to any student. The district's attendance mapping software and the Registration Office were used to verify zoned addresses and confirm each student's designated neighborhood school. This verification enabled a direct comparison of the demographics of students who were optionally assigned with those of the broader student populations of both their zoned school and their selected schools.

Descriptive statistics were analyzed and compared to the demographics of the student groups across the three years. Bar charts and trend lines were used to represent those patterns visually. A chi-square test was then used to determine whether the demographic differences between students pursuing optional assignments and those enrolled in their zoned neighborhood schools were statistically significant. While collecting data on student demographics, additional quantitative data were collected to analyze the third research question. The data included student-to-teacher ratios at the eight elementary schools, total staff per building, year to year enrollment counts by grade, building-level per-pupil expenditures, and standardized test scores. In addition to pulling this data from the student information system, other district records were used to organize it and enable comparisons across buildings and over the three-year study. As with the data collected for Research Questions 1 and 2, all student-level information used in this analysis was de-identified prior to review. Each student was assigned a unique number during earlier data collection, which ensured consistency across all three data sets and protected individual student confidentiality. All data was stored on a password-protected, district-approved server with access restricted to the researcher.

Additional statistics were used to synthesize themes and patterns in staffing, enrollment, funding, and academic performance across the eight elementary schools. Comparisons were conducted between schools with varying levels of enrollment in optional assignments, and an ANOVA was used to determine whether there were statistically significant differences across the eight elementary buildings. Additionally, the researcher examined the relationship between enrollment in optional assignments and building-level outcomes identified in the initial analysis. This extensive analysis and synthesis support the purpose of determining whether the optional assignment policy disproportionately affects certain student groups and whether this intradistrict policy contributes to demographic imbalances across the eight elementary schools.

The findings from all three research questions formed the basis for triangulation within the study. The qualitative themes were cross-referenced with demographic comparisons and academic data. Triangulating across those sources meant that no one data point had to carry the conclusion alone. Patterns and themes in the qualitative data could be tested against the quantitative numbers. Combined, the processes built a complete picture of how the optional assignment policy actually functions within SCASD.

Fiscal Implications

This study was conducted with minimal cost, both directly and indirectly. All data collection, analysis, and reporting were completed using district-approved documents and a district-owned device, with no direct financial cost to SCASD. The data sources used in this study, including the optional assignment application responses, student information system records, and building-level enrollment, financial, and academic achievement data,

were existing records made available at no additional cost. Indirect costs were limited to the time of district staff members who assisted in pulling reports or clarifying data, as well as the use of district technology and storage capacity to support the research.

The cost of the research is far less than what it might prompt once the findings are complete. Should the findings reveal significant imbalances across buildings, district leaders may need to consider policy revisions, staffing adjustments, transportation changes, and enhanced outreach to families. Each of these would raise budgetary concerns and would need to be considered in any policy revisions that are considered as a result of the study.

Validity

The three research questions were clear and designed to understand how SCASD's optional assignment policy impacts families, students, and elementary school buildings. Each question focused on a specific area of that impact. Combined, the questions provide a solid structure for examining both the causes and the potential consequences of intradistrict optional assignment. The mixed-methods approach selected for this study led to a more comprehensive method of collecting, interpreting, and analyzing data to arrive at conclusions that are valid and well-supported.

For internal validity, the three research questions relied on data SCASD already had that included parents' written reasons for requesting optional assignment, student demographic records found in the student information system, and building-level enrollment, staffing, and academic data. No new instruments were created, and no participants were asked to respond to researcher-designed questionnaires. As the Assistant Superintendent of Elementary Education, the researcher is the person who

approves or denies optional assignment requests in SCASD. This is a conflict, and the risk of bias must be considered. Using data the district had already collected was the most straightforward way to keep those biases from influencing the findings.

The use of existing district records, including the optional assignment application responses, student information system data, and building-level financial and academic records, ensured that the data reflected actual district practices. The researcher made efforts throughout the study to document contextual factors such as changes in district enrollment patterns that could influence data interpretation.

External validity was addressed by conducting the study exclusively in SCASD, a district with a long-standing optional assignment policy developed over 20 years ago. This district has similarities to many districts, not only in Pennsylvania but also across the entire United States. While the findings are specific to SCASD, the equity patterns are consistent with research presented in the literature review. Konrath (2021) found imbalances in his work on school choice, and Orfield and Frankenberg (2013) explained that optional assignment policies lack intentional equity guardrails. Because these patterns have surfaced in districts throughout the nation, what is learned in this study may provide insight to other districts that either utilize or consider an intradistrict approach.

Construct validity was addressed through the data sources themselves. Student-level demographic data, per-pupil expenditure records, staffing ratios, enrollment trends, and standardized test scores are all established measures in education research. They were chosen to directly reflect the research questions.

The data used and collected for this study were pulled from several different data sources rather than a single one. Parent application responses told the human side of the

story, while the demographic and building-level data showed what was happening across the eight elementary schools. Using the combined questions gave a fuller picture of how the optional assignment policy functions in SCASD. The triangulation of the data sources helped to ensure that the conclusions were accurate and grounded in evidence.

Additionally, it allowed the qualitative themes from families' responses to be reviewed alongside the quantitative demographic and building-level data. Together, this strengthened the overall trustworthiness of the study by ensuring the findings reflect an honest and comprehensive understanding of how the optional assignment policy functions within SCASD.

Summary

This chapter outlined the methodology used to examine the impact of SCASD's optional assignment policy on families, students, and the eight elementary school buildings across the district. The chapter began by connecting the research design to theory and literature, which helped to frame why a mixed-methods approach was the most appropriate way to study the topic of optional assignment. Because of the complexities of an intradistrict optional assignment, the research needed to be a mixed-methods approach that examined both the human aspect of why parents choose an optional assignment and the measurable impact of this policy on school demographics, staffing, funding, and academic outcomes.

The mixed-methods approach enhanced the study. The qualitative strand used three years of open-ended parent application responses and included the reasoning and circumstances of families involved to develop themes. The quantitative strands then grounded those themes in measurable patterns across all eight elementary schools.

Neither strand would have provided the full picture on its own, but together they give the study more depth and breadth of the impact.

SCASD's Optional Assignment Policy was the starting point for the entire research plan. Its conditions and requirements, such as transportation, told a story before any data was collected. This information helped shape the research design and reinforced the need to review both who is pursuing optional assignments and the impact of that participation on the elementary schools within the district.

The data collected for this study came entirely from existing district records and the student information system. This made it possible to conduct the research with minimal direct cost to the district. Triangulation was used throughout by cross-referencing findings across all three research questions. This ensured that conclusions were supported by multiple data sources rather than a single source. Steps were also taken to ensure validity and to include transparency about the researcher's role as the Assistant Superintendent, which was identified as a potential source of bias and mitigated through the exclusive use of data.

The methodology described in this chapter was designed to assess whether SCASD's optional assignment policy is working equitably for all families in the district. The next chapter presents the results of the data collected and analyzed. It highlights the key findings from the study, including what the data reveal about demographic shifts, changes in academic performance, enrollment patterns, and whether the optional assignment policy is contributing to inequities across SCASD's eight elementary schools.

CHAPTER IV

Data Analysis and Results

The State College Area School District's optional assignment policy has been in place for over 20 years, providing families with the opportunity to request enrollment at an elementary school outside their designated attendance zone. The policy was designed to support family choice and flexibility; however, questions emerged regarding whether this policy equitably serves all families and what impact it has on the demographic composition and academic outcomes of the district's eight elementary schools. This chapter presents the data analysis and results from a mixed-methods study that was designed to answer those questions.

The study was guided by three research questions:

- 1) What factors influence families' decisions to pursue an optional assignment for their child or children?
- 2) How do the racial and socioeconomic demographics of elementary students requesting an optional assignment compare to the demographics of the zoned elementary schools?
- 3) How does the optional assignment policy impact the demographics and academic outcomes of elementary school buildings?

The results drew on three years of optional assignment application data, building-level demographic data, student-level demographic data, and building and student academic-achievement data collected across SCASD's eight elementary schools. Together, these data sources provided a comprehensive and triangulated view of how the optional assignment policy functions within SCASD, and the results were organized to

address each research question in sequence beginning with the qualitative findings from Research Question 1.

Data Analysis Process

The data analysis process for this study incorporated both qualitative and quantitative methods, consistent with the mixed-methods design described in Chapter III. Each data source was carefully aligned to one or more of the three research questions, and the qualitative findings from Research Question 1 were used to provide background and data from the quantitative results in Research Questions 2 and 3. Sequencing was used to help understanding why families pursue optional assignments. This provided a foundation for interpreting the demographic and academic outcome patterns that emerged from the quantitative analysis in questions two and three. Triangulation across all three data strands ensured that conclusions were supported by multiple aligned sources of evidence rather than a single data point (Creswell & Plano Clark, 2018). It should be noted that the three-year window differs slightly across data strands. Optional assignment application data for Research Question 1 spanned from 2023-24 through 2025-26; however, building-level demographic data and academic achievement data covered from 2022-23 through 2024-25 due to the availability of each respective data source at the time of analysis.

Qualitative Analysis

The qualitative analysis addressed Research Question 1 and followed a systematic, multiple step process. The data source was three years of open-ended parent responses submitted as part of SCASD's existing optional assignment application process, and spanned the 2023-24, 2024-25, and 2025-26 school years. A total of 201

applications were reviewed. Prior to any analysis of this data, all student and parent identifying information was redacted and each applicant was assigned a unique identifier to ensure confidentiality and enable consistent tracking across data sets.

The first step in the qualitative analysis was a full review of the 201 application responses. Each response was read and reviewed in its entirety to develop an understanding with the range and nature of the reasons the families provided when applying for the optional assignment. In the second step, the researcher applied thematic coding to group responses into recurring categories based on the reasons families cited for seeking an optional assignment. Responses were sometimes coded into more than one category when a family provided multiple reasons within their application. After initial coding was complete, the researcher reviewed and refined the categories by reviewing the data again to ensure the themes were aligned and accurately collected the full range of responses. This process resulted in eight thematic categories that included: child wellbeing and emotional considerations, transportation and logistics, relocation or moving, school culture and fit, sibling already enrolled at the school, child currently enrolled at the school, parent employed at the school, and IEP or special education services.

The third and final step was a frequency analysis to identify the most commonly cited themes across the full three-year data set, examining whether theme frequency shifted across the three school years. How frequently each theme emerged was tallied by year and in total, and percentage distributions were calculated.

Quantitative Analysis

The quantitative analysis addressed Research Questions 2 and 3 and involved

multiple data sources. Each data source aligned to specific metrics described in the research plan. The steps followed in this component of the analysis were described in this section and are organized by research question.

For Research Question 2, the primary data source was three years of building-level demographic data drawn from State College Area School District's Pennsylvania Information Management System (PIMs) uploads that are pulled from the district's student information system. Files from the 2022-23, 2023-24, and 2024-25 school years were used for this study. For each of SCASD's eight elementary schools the following demographic data was extracted: total enrollment; race enrollment percentages including White, Asian, Black, Hispanic, and two or more races; economically disadvantaged percentage, English Language Learner (ELL) percentage and special education percentage. The data collected were organized into comparative tables and analyzed using descriptive statistics, including percentage distributions and three-year trend comparisons across all eight buildings.

To review whether the race of optional assignment applicants differed significantly from the district's overall student body composition, a chi-square goodness-of-fit test was conducted as part of the study. Within SCASD, families are not required to disclose their child's race or ethnicity during the enrollment process, which means that data was not available for all 201 applicants. Of the 201 applications reviewed, 183 included race or ethnicity information and were used in this analysis. The 18 applicants without race data were excluded from the chi-square analysis only and remained included in all other aspects of the demographic analysis. The chi-square test compared the observed racial distribution of the 183 applicants across the five race categories, White,

Asian, Multi-Racial, Black, and Hispanic, to expected counts calculated from the district's enrollment proportions reported in SCASD's Pennsylvania Information Management System (PIMS) uploads pulled from the district's student information system. A significance threshold of $\alpha = .05$ was used, meaning a finding had to have less than a 5% chance of occurring randomly to be considered significant. Cramer's V was also calculated to measure the practical size of any differences found.

Research Question 3 examined the optional assignment policy's measurable impact on the eight elementary schools. The data included building-level demographics, staffing, funding, and academic performance across the eight elementary schools in SCASD. Building-level enrollment data was collected from SCASD's student information system and included the three-year average enrollment for each school. Classroom teacher counts for each building were also collected for the three school years of 2022-23, 2023-24, and 2024-25. These were used to calculate student-to-classroom teacher ratios for each building and each year. Total professional staff counts for the 2025-26 school year were also compiled for each building as a way to provide a broader picture of staffing resources across all schools. Per-pupil expenditure data were applied by using the district's 2025-26 per-pupil rate of \$18,735.83 to calculate the total operating budget for each building and the financial impact represented by optionally assigned students at each school.

Next, current-year student records were pulled from SCASD's student information system to examine the demographics of students who were optionally assigned in elementary school. For each student, race, ethnicity, and lunch eligibility status were identified and compared to the demographics of the broader district student

population. The lunch eligibility was used to measure socioeconomic status since the researcher was not permitted to obtain that status from the student information system. These comparisons allowed the researcher to determine whether the students using the optional assignment policy reflect the overall demographic makeup or whether certain groups are over- or under-represented.

To review and analyze the comparisons in academic achievement data, two sources were used for the student. The primary source was three years of the Pennsylvania System of School Assessment (PSSA) individual student scores. This data covered the 2022-23, 2023-24, and 2024-25 school years. Building-level proficiency rates that were defined as students in grades 3 through 5 scoring at the Proficient or Advanced level were calculated for English Language Arts (ELA) and mathematics for each of the eight elementary schools. Descriptive statistics and three-year trend analyses were used to identify patterns and changes in proficiency across buildings over time. A one-way ANOVA was conducted to test whether average PSSA scale score differences across the eight buildings were statistically significant. According to Mertler (2023), this is the appropriate test when the goal is to compare means across three or more independent groups to see whether at least one differs from the rest. The significance threshold was set at $\alpha = .05$ for all tests.

The second academic data source was the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP), administered by the district three times per year. Six terms of MAP data were included and covered Fall 2024 through Spring 2026. MAP Rasch UnIT (RIT) scores in ELA and math were used to compare building-level performance and academic growth across schools. MAP RIT scores are measured

on a scale that spans across grades, which makes it possible to compare student performance and growth meaningfully over time. The RIT scale is an equal-interval scale, meaning a gain of one RIT point reflects the same amount of growth no matter where a student starts (NWEA, 2024). This means a gain of one RIT point represents the same amount of growth regardless of a student's current performance level. Student MAP records were matched to the optional assignment roster using local student identification numbers to enable a direct comparison of scores and growth between optionally assigned and non-optionally assigned students. It should be noted that PSSA data covered the 2022-23 through the 2024-25 school years, while MAP data spanned Fall 2024 through Spring 2026. This reflected the availability of each assessment system's data at the time of analysis.

To pull the three research questions together, the qualitative themes from parent application responses were compared directly against the quantitative demographic, staffing, funding, and academic outcome data. This allowed the study's conclusions to be supported by both what families said about their decisions and what the data showed those decisions produced across the district's eight elementary schools.

Results for Research Question 1

What factors influence families' decisions to pursue an optional assignment for their child or children? The data for this question came from three years of open-ended parent responses submitted through SCASD's optional assignment application process and was analyzed using qualitative thematic analysis. A total of 201 applications were reviewed which included 67 applications from 2023-24, 89 applications in 2024-25, and 45 total applications in 2025-26. Of the 201 applications reviewed, 170 were accepted to

attend the optionally assigned requested school. This represented an overall acceptance rate of approximately 84.6%. Acceptance rates were consistent across all three years which showed 82.1% in 2023-24, 87.6% in 2024-25, and 82.2% in 2025-26. Applications were denied primarily due to space limitations at the requested school, which is the primary condition outlined in SCASD's optional assignment policy.

Of the eight schools, Radio Park Elementary was the most requested school across all three years. They received a total of 48 requests. Easterly Parkway was the second requested at 37 requests, Corl Street had 26, and Gray's Woods had 23 across the three years.

Thematic Findings

Analysis of the open-ended parent responses produced eight thematic categories. Because many families cited multiple reasons within a single application, the total number of theme citations were 409 which is more than double the total number of applications reviewed. The eight themes, listed in order of frequency across the full three-year data set, are presented and discussed below. Table 1 summarizes the frequency of each theme by year and in total.

Table 1*Theme Frequency – Optional Assignment Parent Application Responses*

Theme	2023-24	2024-25	2025-26	Total
Child Wellbeing /				
Emotional	26	39	19	84
Child Already Enrolled	22	39	13	74
Transportation & Logistics	24	30	13	67
Relocation / Moving	23	30	6	59
Sibling Already Enrolled	11	24	17	52
School Culture & Fit	11	16	17	44
Parent Works at School	4	13	3	20
IEP / Special Services	3	1	5	9
Total	124	192	93	409

Note. Multiple themes were coded per each individual application. The 409 collected themes exceed the total optional assignment applications due to the multi-theme coding.

Theme 1. The most frequently cited theme across all three years was child wellbeing and emotional considerations. It appeared in 84 application responses and represented 41.8% of all applications reviewed. Families in this category listed their child’s emotional health, sense of belonging, friendships, stability, mental health, and comfort with their current school environment as primary reasons for requesting an optional assignment. This theme was highest in 2024-25, where it was found in 39 applications.

Many families in this category also spoke of life transitions such as moves, family instability or the stress of entering a new school. Families in this category described the optional assignment as a means of maintaining their child's current school placement during a period of change. Another family requesting optional assignment to Easterly Parkway wrote, "My child started at EP and has been there all of her school thus far. She is already familiar with the school, teachers, staff, system, and procedures. I would like her to keep that stability." Another family who cited concerns about racial identity development stated, "We are concerned about the emotional health of our child and would like to place him in a school that is racially diverse. This is important to the development of his racial identity and sense of self."

Theme 2. The second most frequently cited theme was that the child was already enrolled at the requested school, appearing in 74 applications and representing 36.8% of all responses. These applications were mostly submitted by families who had moved out of their original school's attendance zone and sought to allow their child to remain enrolled rather than transfer mid-year or at the start of a new school year. Families in this category often stated that the relationships their child had built with teachers, staff, and peers as the primary reason for wanting to stay at their current placement.

One parent that requested their child remain at Easterly Parkway wrote, "Our daughter has established strong, positive connections to many teachers, staff, and classmates at EP and she would like to stay at EP for the 2024-25 school year." Another family stated, "To keep her in the same school with her sibling that will be attending 3rd grade at EP. We have established a sense of community and would love to continue that."

Theme 3. Transportation and logistical considerations were cited in 67

applications which represented 33.3% of all responses. Families in this category described practical barriers or conveniences related to school access. These included proximity to a parent's workplace, access to before and after school programs, childcare arrangements, and the challenge of managing drop-off and pick-up schedules across multiple schools.

The transportation theme surfaced across all eight schools yet took many different forms depending on a family's individual circumstances. For some families, the connection between a parent's workplace and the school was the primary reason. One parent requesting an optional assignment at Radio Park explained, "My wife and I are faculty members at Penn State and have identified some significant logistical challenges regarding after-school care if our son attends MNE. Due to our teaching schedules and commitments on campus, RP's proximity to Penn State would significantly improve our ability to manage timely pickup from the after-school program." A parent requesting placement to Gray's Woods described a similar situation. She stated, "Next year I will be assigned to GW for a teaching position and for transportation reasons, my family would benefit from my child attending GW where I will be working. I would not have the ability to get him on and off the school bus and get to the school on time." Finally, a Park Forest family noted, "there is another child in our household that is going to PFE. We would like to make things easier by having them go to the same school so schedules can stay the same and we do not run into conflict of having to be two places at once."

Theme 4. Relocation or moving was given as a reason in 59 applications and this represented 29.4% of all responses. This theme captured applications submitted by families who had recently moved or were in the process of moving from one attendance

zone to another within the district. These individuals requested the optional assignment as a way to minimize disruptions in their child's schooling. The relocation theme was cited far more in 2023-24 and 2024-25 as compared to 2025-26. Between the first two years, there were a total of 53 requests due to relocation; however, in 2025-26 there were only 6. This theme was drawn from parents requesting optional assignment at all eight schools.

Families in this category consistently described wanting to protect their child from the disruption of changing schools either mid-year or mid-elementary career. One family who requested their child remain at Spring Creek stated, "This move would change my daughter's school to MNE. It is my wish for her to finish off the rest of the current school year at Spring Creek. I feel that starting at a brand-new school in the middle of the year would be too much for her at this time." A family who requested Gray's Woods explained, "[child] has been established at GW since Kindergarten. Both myself and her father have moved to new houses in State College and GW would be central to both of us. Allowing [child] to stay at GW would provide some stability as she experienced many changes lately." Another family who requested Corl Street described their child's situation by stating, "He was enrolled here before we moved in October and would like to stay at this school rather than transferring during the school year."

Theme 5. The theme of sibling enrollment was provided in 52 applications which represents 25.9% of all responses. Families in this category requested optional assignment so that younger children could attend the same school as older siblings already enrolled there. In most cases, these were students who were granted permission to optionally assign in early years. There were a few, however, whose sibling attended the

school due to specialized special education services. The parents of these families used both logistical benefits of having all of their children at the same school as well as the emotional comfort that came from a younger child entering a familiar building where an older sibling was already attending. This theme proved somewhat inconsistent throughout the three years with 11 requests in 2023-24, 24 in 2024-25, and 17 in 2025-26.

Once again, all eight schools were represented in this theme and showed a district-wide pattern for the optional assignment request. A family at Corl Street stated, “My older daughter is currently enrolled at CS in 3rd grade. We would love for the siblings to stay in the same school.” A parent who requested Radio Park stated, “[Child] is already at RP. I hope I could put my two kids in the same school, which is convenient for me to drop off and pick up and take care of.”

Theme 6. School culture and personal fit was cited in 44 applications and this represented 21.9% of all responses coded. This theme focused on families who chose a school based on its perceived environment, academic reputation, diversity, inclusive community, or overall climate. In 2023-24 there were only 11, then increased to 16 in 2024-25, and to 17 in 2025-26.

The reasons that were categorized into this theme varied across schools. For example, families at Corl Street most often referenced its welcoming, smaller-school environment. One parent stated, “She is reintegrating to public school from a season of homeschooling and the smaller friendly culture at Corl Street feels less intimidating.” Families who requested Radio Park cited examples such as academic reputation and a safe, inclusive environment. One family explained, “My son is eager to learn and will benefit greatly from the school’s strong academics and good behavior. The school’s safe

and inclusive environment is exactly what my son needs to grow academically and socially.” Another family requesting Radio Park described a thoughtful and multi-dimensional decision: “At the request of a child therapist both children have encountered decreasing confidence in themselves at school and as parents we feel strongly about increasing their confidence for future successes. Our children are [of mixed cultural heritage] and raised with bicultural practices and have encountered insensitivity at their current school.”

Theme 7. The seventh theme was parents employed at the requested school. This was listed in 20 applications and represented 10.0% of all responses. This theme focused on families in which a parent or guardian worked at or had been assigned to the school they were requesting their child to attend. These individuals were most commonly professional staff members. For these families, optional assignment worked logistically for them and was an added benefit because it allowed the parent and the child to share transportation by attending the same school. This theme appeared across six of the eight schools.

The specific circumstances for this theme varied. One parent requesting Mount Nittany explained, “I am the art teacher at MNE. It would be beneficial for our family for my child to come to my home school. It would help with transportation, attending school events, and ease the transition into kindergarten.” A parent requesting Radio Park said, “I am a school bus driver for the district, and my route goes to PFE. I am a single mom so this would help me tremendously.” Finally, a parent who requested Corl Street explained their child’s mother was a teacher there. “We would like our daughter to be able to attend the same school as her mom to help with before and after-school care.”

Theme 8. The final theme that emerged focused on IEP and special education service. This theme emerged nine times and represented 4.5% of all parent responses. Families in this category requested optional assignment specifically to maintain continuity of established IEP services. There was interest maintaining already established relationships and continued access to their already established program.

The applications that cited IEP and special services occurred in multiple schools. One family requested their child remain at Ferguson Township and stated that her daughter, “has attended FTE since kindergarten. She gets amazing support concerning her IEP and has made amazing progress. I do not want to interrupt this and the amazing staff has contributed to her progress. She has formed a great circle of friends and I would like her to continue into 5th grade with her peers.” Another family requesting to stay at MNE stated, “We just moved to the Lemont area. With her IEP services, I feel it is best to keep her in a school she is familiar with.” Finally, a Corl Street parent stated, “We have purchased a home in Toftrees but I would like my child to finish the year at CS, especially considering his new MTSS and IEP team.”

Across the 201 optional assignment applications reviewed over three school years, families cited eight distinct themes with many applications containing multiple themes resulting in 409 coded responses. There is no one single factor for the reasons provided; instead, the findings show a variety of emotional, logistical, relational, and overall values motivations that vary across families and schools. These patterns in family decisions raise an important question regarding equity and access and Research Question 2 addressed this by examining whether the students pursuing optional assignments reflect the demographic makeup of the district as a whole or whether certain groups are

disproportionately represented among those who choose to optionally assign.

Results for Research Question 2

How do the racial and socioeconomic demographics of elementary students requesting an optional assignment compare to the demographics of zoned elementary schools? This question looked at equity from a quantitative angle by examining whether the students who pursue optional assignments reflect the overall demographic makeup of the district's eight elementary schools or whether certain groups are applying at disproportionate rates. To answer this question, three years of building-level demographic data were drawn from State College Area School District's Pennsylvania Information Management System (PIMs) uploads for the 2022-23 through 2024-25 school years. The data sets were compiled, organized, and analyzed using descriptive statistics and a chi-square goodness of fit test. The demographic data of 183 optional assignment applicants with known race or ethnicity identified in Research Question 1 analysis were then compared to building-level patterns.

Enrollment

The district's eight elementary schools served a combined enrollment of approximately 2,823 students in 2024-25, which was a decline from 2,861 students in 2022-23. Although the overall district numbers are relatively stable, individual school numbers varied. Radio Park Elementary experienced the largest enrollment growth of any school as they increased by 28 students over the three-year period. Ferguson Township Elementary has the largest decline losing 25 students over the same timeframe. These enrollment shifts are relevant to Research Question 2 because they indicate the eight buildings are not fixed and their size, composition, and trajectories each contribute

differently the district's overall demographics. Table 2 presents the year-by-year enrollment for each school.

Table 2

Enrollment by School

School	2022-23	2023-24	2024-25	Change 22→25
Corl Street	239	226	250	11
Easterly Parkway	316	320	314	-2
Ferguson Township	312	290	287	-25
Gray's Woods	369	359	356	-13
Mount Nittany	430	424	413	-17
Park Forest	430	413	419	-11
Radio Park	396	432	424	28
Spring Creek	369	381	360	-9
TOTAL	2,861	2,845	2,823	-38

Note. Enrollment figures reflect official counts from SCASD's Pennsylvania Information Management System (PIMS) uploads for each respective school year.

Racial and Ethnic Demographics Across Elementary Buildings

The racial and ethnic composition of each school's enrolled population is in the primary focus for Research Question 2. The data revealed significant and persistent variations across the eight buildings. In 2024-25, the district-wide White enrollment average was 75.9%, yet individual schools ranged from as high as 88.5% at Gray's Woods Elementary to a low of 59.7% at Radio Park Elementary. This difference has

remained steady across all three years of the study which indicates it is not a temporary difference but instead a pattern of student distribution across the schools. Table 3 presents the full racial and ethnic breakdown for each school for 2024-25, the most recent year in the study.

Table 3

Full Race/Ethnicity Breakdown by Elementary School, 2024-25

School	Enroll-ment	White %	Asian %	Black %	Hispanic %	2+ Races %	Non-White %
Corl Street	250	76.8	12.8	0.8	4.4	4.8	23.2
Easterly Parkway	314	62.1	11.2	8.9	8.6	9.2	37.9
Ferguson Township	287	76.7	12.2	0.7	2.1	8.4	23.3
Gray's Woods	356	88.5	3.9	0.3	2	5.1	11.5
Mount Nittany	413	80.4	6.8	2.2	4.1	6.5	19.6
Park Forest	419	75.9	6.7	3.8	6.4	6.9	24.1
Radio Park	424	59.7	22.9	2.8	4.3	10.1	40.3
Spring Creek	360	82.8	4.4	1.4	3.3	8.1	17.2
Total Number	2823	2127	286	75	125	210	696
District Average %		75.36	10.11	2.61	4.40	7.39	24.64

Note. District averages are drawn from SCASD's PIMS uploads.

Easterly Parkway Elementary and Radio Park Elementary are consistently the district's most racially diverse buildings, with non-White enrollment of 37.9% at Easterly Parkway and 40.3% at Radio Park in 2024-25 which is well-above the 24.1% district average. Both schools function as ESL hubs within the district and, as established in

Research Question 1 analysis, are also the two most requested schools among optional assignment applicants. Gray's Woods Elementary is the least racially diverse building in the district at 11.5% non-White, followed by Spring Creek Elementary at 17.2%.

Ferguson Township Elementary recorded the largest shift in non-White enrollment over the three years, increasing from 18.3% in 2022-23 to 23.3% in 2024-25. This change was primarily from growth in the Asian and Multi-Racial student populations. With regard to the Asian population, Radio Park's Asian enrollment is 22.9% which is more than double the district average of 9.1%. Across all three years of the study, the same schools that had the highest non-White enrollment in 2022-23 still had the highest non-White enrollment in 2024-25, and the same schools that had the lowest still had the lowest.

Socioeconomic Indicators Across Elementary Schools

Socioeconomic status was measured across three indicators that included economically disadvantaged percentage, English Language Learner (ELL) percentage, and special education percentage. Together, these three indicators show how students with additional support needs are distributed across the eight buildings.

The economic disadvantage percentage reflects the share of students qualifying for free or reduced-priced lunch and is the primary socioeconomic indicator used in this case study. District-wide, this rate was approximately 22.9% in 2024-25, yet across the elementary schools, there were stark differences. Gray's Woods Elementary School had the lowest rate at 12.6% and Easterly Parkway has the highest percentage at 42.7% for the 2024-25 school year. Easterly Parkway's is almost double the district average and almost four times greater than Gray's Woods. Data also showed that Easterly Parkway's

rate had increased each year over the three years with an increase of over 5% from 2022-23 to 2024-25. Table 4 presents three-years of data for each building with the optional assignment students included within the data.

Table 4

Economically Disadvantage Percentage by School

School	2022-23	2023-24	2024-25	Change 22→25
Corl Street	18	19.9	26	+8
Easterly Parkway	37.3	38.4	42.7	+5.4
Ferguson Township	11.9	15.2	18.1	+6.2
Gray's Woods	12.2	11.4	12.6	+0.4
Mount Nittany	20.5	22.4	24	+3.5
Park Forest	19.3	18.9	26.5	+7.2
Radio Park	15.7	19	22.2	+6.5
Spring Creek	19.8	20.2	22.8	+3
District Average	19.4	20.7	22.9	+3.5

Note. Data from Future Ready PA Index School Fast Facts, 2022-23 through 2024-25

The English Language Learner (ELL) students across the district also has an uneven distribution. There are five elementary schools within the district that serve as hubs for ELL students. Those include Corl Street, Easterly Parkway, Mount Nittany, Radio Park and Park Forest. Within those hubs, two schools support the largest population of ELL students and far exceed the district average of 4.2%. In 2024-25, Easterly Parkway had an ELL population of 15.0% and Radio Park was at 10.4%.

Together these two schools hold a disproportionate share of the district's ELL students and the two most requested buildings for optional assignment.

For special education, the numbers were more evenly distributed across the schools than compared to the economically disadvantaged and ELL students. The district special education average in 2024-25 was 13.7% and ranged from 11.2% at Gray's Woods to 16.3% at Radio Park. Radio Park's special education rate increased by 4.7 percentage points over the three-year window and Ferguson Township increased 2.8%.

Chi-Square Analysis

To find out whether the racial makeup of optional assignment applicants matched the district's overall student population, a chi-square goodness-of-fit test was run. The test compared the actual racial breakdown of the 183 applicants with known race data across five groups that included White, Asian, Multi-Racial, Black, and Hispanic and reviewed what would be expected if applicants reflected district enrollment proportions. A result was considered statistically significant if the probability of it occurring by chance was less than 5%, written as $\alpha = .05$. Cramer's V was also calculated to measure not just whether a difference existed but how large that difference actually was.

The test confirmed that the racial composition of optional assignment applicants is significantly different from the district's overall enrollment: $\chi^2(4) = 37.99$, $p < .001$, Cramer's V = 0.228. The null hypothesis was rejected. What the numbers show is that not all families are accessing the optional assignment policy at equal rates. White students make up 76.1% of district enrollment but represented only 61.7% of applicants, meaning they are applying below their enrollment share. Asian students applied at nearly double their district enrollment proportion, and Black students applied at close to three times

their enrollment share. Hispanic applicants applied at a rate that closely matched their district proportion. Table 5 presents the full breakdown of observed and expected counts for each group along with the direction of each difference.

Table 5

Chi-Square Goodness-of-Fit: Observed vs. Expected Race Compared to Dist. Enrollment

Race/ Ethnicity	Observed	Observed %	District Enroll.%	Expected	Diff.	Direction
White	113	61.7	76.1	139.2	-26.2	Under-rep
Asian	31	16.9	9.1	16.7	14.3	Over-rep
Multi-Racial	16	8.7	7.5	13.8	2.2	Slightly over
Black	15	8.2	2.7	5	10	Over-rep
Hispanic	8	4.4	4.6	8.4	-0.4	Similar
TOTAL	183	100%	100%	183		

Note. Counts are calculated from SCASD enrollment data reported in PIMS uploads.

Additional data focused on other patterns within the data. Radio Park and Easterly Parkway are the two most diverse buildings in the district and also the buildings with the highest percentage of ELL students. Additionally, Easterly Parkway also has the highest economically disadvantaged population. These two schools are also the most requested schools for optional assignment among all optional assignment applications. Asian and Black families who are both overrepresented according to the Chi-Square Goodness-of-Fit test disproportionately request these two schools, with Asians requesting Radio Park at a higher percentage and Black families requesting Easterly Parkway the most. Although the White applicants are underrepresented overall, when reviewing the population by school there is over-representation at Gray's Woods and Spring Creek which are also the district's two least diverse buildings.

Summary of Research Question 2 Findings

The demographic data reveals three patterns in how students are distributed across the district's eight elementary schools. The results showed differences in demographic make-up. White student enrollment ranged near 29 percentage points across buildings, and that gap had not changed over the three-year period. Easterly Parkway and Radio Park had the highest ELL concentrations of any school in the district. Easterly Parkway also had the highest economically disadvantaged rate.

The optional assignment applicant pool does not match the district enrollment proportion. A chi-square test confirmed this. Asian families applied for optional assignment at almost twice their enrollment share and Black students applied at close to three times their rate. White families applied below their enrollment share but over their rate at the two least diverse schools. The most requested schools were Easterly Parkway and Radio Park which are also the most diverse buildings.

Results for Research Question 3

How Does the Optional Assignment Policy Impact the Demographics and Academic Outcomes of the Elementary School Buildings? This question examined the measurable impact of SCASD's optional assignment policy on building-level demographics, staffing, funding, and academic performance across the district's eight elementary schools. To answer this question, multiple data sources were collected, compiled, and analyzed. These included three-year average enrollment by grade, classroom teacher counts for each of the three school years, total professional staff counts for 2025-26, per-pupil expenditure data, current-year student demographics, three years of PSSA individual student score records, and six terms of MAP RIT data covering Fall

2024 through Spring 2026.

Building Level Findings

The district's eight elementary schools had a combined three-year average enrollment of approximately 2,759 students. Radio Park is the largest building at an average of 437 students and Corl Street is the smallest at 255 students. In the current school year, 150 students are enrolled through optional assignment at the elementary level. This represents approximately 5.4% of the district's total elementary enrollment. The number of optional assignment students varied across the eight buildings. Easterly Parkway has the highest number with 33 optional assignment students. This represents 22% of all optionally assigned students district-wide. Radio Park has 30 optionally assigned students and ranks second for total number. Following these two schools is Park Forest (20), Gray's Woods (19), Corl Street (18), Mount Nittany (15), Spring Creek (11), and Ferguson Township (4). Table 6 shows the optional assignment enrollment by building.

Table 6*Optional Assignment Enrollment by Building – 2025-26*

School	Opt. Assign. Students	Percent of All Opt. Assign. Students	Building Enrollment	Percent of Building Enrollment
Easterly Parkway	33	22	295	11.2
Radio Park	30	20	437	6.9
Park Forest	20	13	404	5.0
Gray's Woods	19	13	348	5.5
Corl Street	18	12	255	7.1
Mount Nittany	15	10	401	3.7
Spring Creek	11	7	351	3.1
Ferguson Township	4	3	268	1.5
TOTAL	150	100%	2,759	5.40%

Average Class Size. Easterly Parkway has the lowest average class size in the district at 17.7 students per classroom. Its third grade has an average of 15.1 students which is the lowest of any grade on average across all eight buildings and across grade spans K-5. Mount Nittany has the largest average class size at 21.5 students per classroom. Over the three years, it's fifth grade averaged 25.1 students which is the highest single grade class size average in the elementary school. Ferguson Township's fourth grade averaged 24.4 students which was the second highest of any single grade across all schools.

Staffing. Next, student to classroom teacher ratios were calculated for each school year using building enrollment and the number of classroom teachers per year. Classroom teachers for this study are defined as those teachers providing the core academic instruction in grades K through 5. Table 7 presents the student-to-teacher ratios

for all three years.

Table 7

Student-to-Classroom Teacher Ratio by School and Year

School	2022-23	2023-24	2024-25	3-Yr Avg
Corl Street	21.2:1	21.2:1	21.2:1	21.2:1
Easterly Parkway	17.4:1	16.4:1	16.4:1	16.7:1
Ferguson Township	15.8:1	16.8:1	17.9:1	16.8:1
Gray's Woods	19.3:1	19.3:1	19.3:1	19.3:1
Mount Nittany	20.1:1	20.1:1	21.1:1	20.4:1
Park Forest	20.2:1	21.3:1	20.2:1	20.6:1
Radio Park	21.9:1	20.8:1	20.8:1	21.2:1
Spring Creek	20.6:1	19.5:1	19.5:1	19.9:1

Easterly Parkway had the lowest student-to-teacher ratio of any building in every year of the study. The averages were 17.4:1 in 2022-23, 16.4:1 in 2023-24, and 16.4:1 in 2024-25. Corl Street had the highest consistent ratio at 21.2:1 across all three years. Ferguson Township's ratio increased from 15.8:1 in 2022-23 to 17.9:1 in 2024-25. Between these two years, the total classroom teacher allotment at Ferguson Township was reduced by two due to reduced enrollment and a corresponding reduction in classroom teacher sections. All other elementary schools ranged from 19.3:1 to 21.3:1 across the three years with little to no variation.

The total professional staff counts for 2025-26 are also reported for each building. Easterly Parkway has the highest total staff at 69 who served 295 students. This

calculated to a ratio of 4.3 students per staff member. Radio Park has 53 total staff serving from 437 students which was a ratio of 8.2 students per staff member and was the highest student-to-staff ratio in the district. The remaining schools range from 4.2 students per staff member at Corl Street to 7.3 at Park Forest.

The district's 2025-26 per-pupil expenditure rate is \$18,735.83. This rate was applied to calculate the total operating budget for each building and the funding represented optionally assigned students at each. The rate for students with special education services or other related services was not considered and the flat rate of \$18,735.83 was used as the standard rate. Table 8 shows the per-building figures.

Table 8

Per-Pupil Expenditure and Optional Assignment Financial Impact by Building

School	Avg Enrollment	Total Budget	Opt. Assign. Number	Opt. Assign. Financial Impact
Corl Street	255	\$4,777,637	18	\$337,245
Easterly Parkway	295	\$5,527,070	33	\$618,282
Ferguson Township	268	\$5,021,202	4	\$74,943
Gray's Woods	348	\$6,520,069	19	\$355,981
Mount Nittany	401	\$7,513,068	15	\$281,037
Park Forest	404	\$7,569,275	20	\$374,717
Radio Park	437	\$8,187,558	30	\$562,075
Spring Creek	351	\$6,576,276	11	\$206,094
TOTAL	2,759	\$51,692,155	150	\$2,810,374

Note. Flat rate, per-pupil ratio = \$18,735.83 for the 2025-26 school year.

As stated previously, Easterly Parkway has 33 optional assignment students currently enrolled at that school. This represents \$618,282.39 in per pupil funding and is the highest optional assignment dollar amount of any of the eight elementary schools. Radio Park's 30 optional students represent \$562,074.90 followed by Park Forest's 20 students at \$374,716.60, Corl Street's 18 students at \$337,244.94, Gray's Woods 19 students at \$355,980.77, Mount Nittany's 15 students at \$281,037.45, Spring Creek's 11 students at \$206,094.13, and Ferguson Township's 4 students at \$74,943.32. Across all eight buildings, the 150 optional assignment students represent a total of \$2,810,374.50 in per-pupil funding.

To examine race, ethnicity, socioeconomic status, IEP status, and English Learner demographics, current-year student records from SCASD's student information system was used. With regard to race and ethnicity, 101 students or 67.3% identify as White, 13 or 8.7% Asian, 13 or 8.7% multi-racial, 12 or 8.0% Black, and 10 or 6.7% Hispanic, and 1 unknown or .7% which is unaccounted for in the data. In total 49 of the 150 or 32.0% of current optionally assigned students identify as non-white.

With regard to lunch eligibility, which was used to determine socioeconomic status, 33 students or 22.0% qualified for free lunch, 6 or 4.0% qualified for reduced price lunch and 111 or 74% of the optionally assigned students did not qualify. Regarding IEP status 26, or 17.3% of the 150 optionally assigned students have an active IEP. With English Language learners, 14 or 9.3% of the 150 optionally assigned are currently active or being monitored.

The demographic composition of optional assignment students varied by receiving school. Easterly Parkway, an already diverse school has 16 non-White students

of the 33 optionally assigned. This represents 48.5% of the total optionally assigned at that school. Black students make up 10 of the 33 optionally assigned at Easterly Parkway which is 30.3%. At Radio Park, 11 of the 30 or 36.7% of optional assignment students are non-White but at this school the Asian students are the largest non-White group at 5 students or 16.7%. At Gray's Woods, only 1 of the 19 or 5.3% of students optionally assigned are non-White. At Ferguson Township all 4 or 100% of optionally assigned students identify as White. Table 9 shows the demographic breakdown of optionally assigned students by elementary school.

Table 9

Demographic Profile of Optional Assignment Students by Chosen School, 2025-26

School	Total Opt. Assigned	White	Asian	Black	Hispanic	Multi-Racial	Non-White %	Free Lunch	IEP	Active EL
Corl Street	18	12	5	0	1	0	33.30%	3	3	5
Easterly Parkway	33	17	1	10	2	3	48.50%	4	4	0
Ferguson Township	4	4	0	0	0	0	0.00%	2	2	0
Gray's Woods	19	17	0	0	1	0	5.30%	4	1	0
Mount Nittany	15	9	1	0	4	1	40.00%	4	4	2
Park Forest	20	16	0	0	1	3	20.00%	5	3	0
Radio Park	30	19	5	2	1	3	36.70%	8	5	6
Spring Creek	11	7	1	0	0	3	36.40%	3	4	1
TOTAL	150	101	13	12	10	13	32.70%	33	26	14

Academic Outcomes

PSSA proficiency rates for English Language Arts (ELA) and math were calculated for each of the eight elementary schools across the 2022-23, 2023-24, and 2024-25 school year. Proficiency was defined for this study as the percentage of students in grades 3 through 5 who scored Proficient or Advanced.

In ELA the building proficiency rates in 2024-25 ranged from 53.8% at Gray's

Woods Elementary to 80.1% at Ferguson Township. Gray's Woods Elementary had the lowest ELA data for three years at an average of 56.8% followed by Easterly Parkway's proficiency rate at 59.4%. In 2024-25, Ferguson Township was the only school to show an increase in ELA proficiency every year. This school was at 71.3% in 2022-23 and rose to 80.1% in 2024-25. The district average for the three years was 68.9%. Table 10 presents the full three-year ELA proficiency data.

Table 10*PSSA ELA Proficiency Rates by School*

School	2022-23	2023-24	2024-25	3-Yr Avg
Corl Street	72.10%	75.40%	65.90%	71.10%
Easterly Parkway	59.50%	59.60%	59.20%	59.40%
Ferguson Township	71.30%	78.20%	80.10%	76.50%
Gray's Woods	58.30%	58.20%	53.80%	56.80%
Mount Nittany	66.40%	67.50%	67.40%	67.10%
Park Forest	72.70%	73.10%	67.70%	71.20%
Radio Park	72.40%	73.80%	73.20%	73.10%
Spring Creek	70.90%	78.10%	67.60%	72.20%
District Average	69.10%	70.30%	67.40%	68.90%

In mathematics, the building proficiency rates varied across buildings. In 2024-25 the rates ranged from 54.3% at Easterly Parkway to 78.8% at Ferguson Township. Easterly Parkway had the lowest math proficiency rate every year with 53.2% in 2022-23, 57.1% in 2023-24, and 54.3% in 2024-25. Radio Park was the only school in the

district to show an increase in math proficiency across the three years. They went from 70.6% in 2022-23 to 72.7% in 2024-25. The district average math proficiency for the three years was 66.2%. Table 11 presents the full three-year math proficiency data.

Table 11

PSSA Math Proficiency Rates by School, 2022-23 to 2024-25

School	2022-23	2023-24	2024-25	3-Yr Avg
Corl Street	72.10%	73.00%	66.40%	70.50%
Easterly Parkway	53.20%	57.10%	54.30%	54.90%
Ferguson Township	79.40%	76.90%	78.80%	78.40%
Gray's Woods	60.60%	54.90%	56.00%	57.20%
Mount Nittany	65.20%	62.70%	64.30%	64.10%
Park Forest	71.60%	71.40%	69.30%	70.80%
Radio Park	70.60%	69.00%	72.70%	70.80%
Spring Creek	68.20%	69.40%	67.60%	68.40%
District Average	67.60%	65.60%	65.50%	66.20%

PSSA Scale Score Analysis. To determine whether the differences in mean PSSA scale scores across the eight buildings were statistically significant, a one-way ANOVA was conducted separately for each subject and each year. Mertler (2023) describes a one-way ANOVA as the appropriate test when a researcher wants to compare the means of three or more independent groups on a single outcome measure to determine whether at least one group differs significantly from the others. With eight elementary buildings serving as the independent groups and mean PSSA scale scores as the outcome measure,

a one-way ANOVA was the appropriate choice for this analysis. Both tests and all three years were tested separately. All six tests produced statistically significant results. For ELA, the F statistic was 5.658 in 2022-23, 4.838 in 2023-24, and 7.320 in 2024-25 with $p < .001$ in all three years. For mathematics, the F statistic was 6.412 in 2022-23, 3.955 in 2023-24, and 4.777 in 2024-25 again with $p < .001$ in all three years. Table 12 presents the full ANOVA results.

Table 12

ANOVA Results – PSSA Scale Scores Across Eight Elementary Buildings

Assessment	Year	Subject	F Statistic	p-value	Significant?
PSSA	2022-23	ELA	5.658	< .001	Yes
PSSA	2022-23	Math	6.412	< .001	Yes
PSSA	2023-24	ELA	4.838	< .001	Yes
PSSA	2023-24	Math	3.955	< .001	Yes
PSSA	2024-25	ELA	7.32	< .001	Yes
PSSA	2024-25	Math	4.777	< .001	Yes
MAP	Spring 2025	Math RIT	3.995	< .001	Yes
MAP	Spring 2025	ELA	4.857	< .001	Yes

Note. All tests conducted using a one-way ANOVA. Significance threshold of $\alpha = .05$

Degrees of freedom = 7 for all tests.

MAP Assessment Results.

The study also reviewed the academic outcomes of the school by reviewing the RIT Scores on the Measures of Academic Progress (MAP) assessment. Spring 2025 MAP RIT scores were calculated for each building in ELA and mathematics. In ELA,

scores ranged from 198.2 at Easterly Parkway to 209.0 at Radio Park. In math, mean RIT scores ranged from 210.3 at Easterly Parkway to 219.1 at Radio Park. A one-way ANOVA confirmed that these differences across buildings were statistically significant in both subjects. In math the F statistic was 3.995 with $p < .001$ and in ELA the F statistic was 4.857 with $p < .001$.

The academic growth from Fall 2024 to Spring 2025 was also calculated for each building. In math, growth ranged from 15.7 RIT points at Gray's Woods to 20.2 RIT points at Ferguson Township. Easterly Parkway students gained 18.4 RIT points in math and 9.2 points in ELA. Ferguson Township showed the highest growth in both math at 20.2 points and ELA at 12.4 points. Table 13 presents MAP RIT scores and growth by building.

Table 13

MAP Spring 2025 Scores and Fall 2024 to Spring 2025 Growth by School

School	Math RIT	ELA RIT	Math Growth	ELA Growth
Corl Street	214.6	205.2	17.4	8.9
Easterly Parkway	210.3	198.2	18.4	9.2
Ferguson Township	216.2	207.0	20.2	12.4
Gray's Woods	211.0	203.4	15.7	11.9
Mount Nittany	211.9	205.0	17.9	10.5
Park Forest	214.9	206.0	19.3	11.2
Radio Park	219.1	209.0	18.0	10.4
Spring Creek	214.0	205.3	18.5	12.0

Note. RIT – Rasch UnIT scale score. Growth equals RIT from Fall 2024 to Spring 2025.

Optional Assignment Academic Comparison. Finally, to review whether optional assignment students perform differently than non-optionally assigned students, PSSA records were matched to the optional assignment roster using local student ID numbers. The matched sample included 8 students in 2022-23, 39 students in 2023-24, and 59 students in 2024-25. Independent sample t-tests were conducted for each year and each subject. None of the six t-tests produced statistically significant results. In ELA, p-values were .434 in 2022-23, .735 in 2023-24, and .215 in 2024-25. In mathematics, p-values were .626 in 2022-23, .947 in 2023-24, and .485 in 2024-25. All values were above the $\alpha = .05$ significance threshold.

Spring 2025 MAP scores showed the same pattern. Optional assignment students scored 2.1 RIT points below non-optional peers in mathematics ($p = .360$) and 3.6 points below language arts at $p = .090$. Neither difference reached statistical significance. Table 14 presents the full PSSA comparison results.

Table 14

Optional Assignment vs. Non-Optional Assignment – PSSA Scale Score Comparison

Subject	Year	Opt. Assign. Number	Opt. Mean	Non-Opt. Number	Non-Opt. Mean	Diff.	p-value	Signif.?
ELA	2022-23	8	1,093.20	1,384	1,064.10	29.1	0.434	No
ELA	2023-24	39	1,059.60	1,353	1,065.30	-5.7	0.735	No
ELA	2024-25	59	1,037.20	1,311	1,054.50	-17.3	0.215	No
Math	2022-23	8	1,082.00	1,396	1,061.50	20.5	0.626	No
Math	2023-24	39	1,065.00	1,369	1,066.40	-1.4	0.947	No
Math	2024-25	59	1,080.60	1,330	1,068.60	12	0.485	No

Note. Independent samples t-test. Significance threshold $\alpha = .05$.

Triangulation of Data Sources

The findings from all three research questions were examined together to determine whether patterns identified in one data strand were supported by evidence from the others. In this triangulation process, the qualitative themes from Research Question 1 provided the human context for interpreting the quantitative patterns in Research Questions 2 and 3. For example, the steady rise from 11 in 2023-24 to 17 in 2025-26 of the school culture and fit theme in the qualitative data was supported by the Research Question 2 finding that Asian and Black families apply for optional assignment at proportionally higher rates than their district enrollment overall percentage. Additionally, the data also found that the two most requested schools, Easterly Parkway and Radio Park, are also the district's most racially diverse buildings. This pattern was also connected to Research Questions 3. Easterly Parkway and Radio Park were confirmed to have the highest concentrations of optional assignment students, the most racially diverse optional assignment populations, and the largest differences in building-level academic performance outcomes.

Across the three research questions, multiple data sources pointed to the same schools, the same families, and similar patterns which strengthened the confidence that the findings reflect how the optional assignment policy functions within SCASD. No single data source provided the conclusion to the questions; instead, the qualitative themes, demographic data, and academic outcome data each provided a different lens that brought the same underlying patterns to the surface. Together, these patterns help to form a picture of the policy's impact on families, students, and the eight buildings across the district.

Summary

Chapter IV presented the data analysis and results from a mixed-methods study that examined the impact of SCASD's optional assignment policy on families, students, and the district's eight elementary schools across three school years. The findings from all three research questions show a clear picture of how the policy functions within the district.

Research Question 1 showed that families pursue optional assignments for a wide variety of reasons. Eight themes emerged with child wellbeing and emotional stability, continuity of enrollment, and transportation and logistics were the most frequently cited factors across all three years. The school culture and fit theme grew each year and went from 11 to 17 in the three-year span. All eight schools were represented across the themes confirming that optional assignment is a district-wide pattern driven by family perceptions and decisions.

Research Question 2 analysis found that the racial and socioeconomic composition of optional assignment applicants does not reflect the district's overall demographic makeup and that a chi-square test confirmed the difference was statistically significant. Additionally, meaningful differences in racial and socioeconomic composition exist across the eight elementary buildings with some schools showing a disproportionate concentration of students with additional support needs.

Research Question 3 examined the impact of the optional assignment policy on building-level demographics, staffing, funding, and academic outcomes across the eight elementary schools. The analysis found that optional assignment students are not evenly distributed across the eight buildings, that per-pupil funding follows optionally assigned

students to their chosen school, and that statistically significant academic performance differences exist across the eight buildings when measured by both PSSA and MAP assessments. Together, the analysis and results provide a comprehensive and triangulated view of how the optional assignment policy functions within SCASD. The implications of these findings and recommendations for future policy decisions are addressed in Chapter V.

CHAPTER V

Conclusions and Recommendations

The State College Area School District's optional assignment policy has been in place for over 20 years and provides families with the opportunity to request enrollment at an elementary school outside of their designated attendance zone. The policy was designed to support family choice and flexibility; however, questions emerged regarding whether this policy equitably serves all families and what impact it has on the demographic composition and academic outcomes of the district's eight elementary schools.

The findings in Chapter IV showed several patterns across all three research questions that drew on three years of optional assignment application data, building-level demographic data, student-level demographic data, and building and student academic-achievement data collected across the district's eight elementary schools. Together, they revealed a policy that is causing unevenness across the district's eight elementary schools.

Chapter V presents the conclusions and recommendations from the findings and explains how the results will be shared to improve policy and practice within the State College Area School District. The conclusions address the effectiveness of the current optional assignment policy, review how the results applied to the district's school setting, and considers the fiscal implications that are reflected in the study. This chapter plans to not only explain the what the data revealed but also provide the district's Board and administration with recommendations that are clear and evidence based. The following sections outline the conclusions drawn from the study, the limitations from the study, and

recommendations for future research and plans that are aimed at supporting and strengthening equitable access across all eight elementary schools in the district.

Conclusions

The findings from this mixed-methods study provide a detailed and triangulated understanding of how the State College Area School District's optional assignment policy functions across its eight elementary schools. The conclusions drawn from each of the three research questions are addressed in order below and provide a description of how the results will be applied within the district and the fiscal implications reflected in the study.

Research Question 1

What factors influence families' decisions to pursue an optional assignment for their child or children? This study regarding the optional assignment policy in the State College Area School District concluded that families pursue optional assignments for a variety of reasons including but not limited to personal, logistical, and relational situations. There is no single factor that drives the decisions for parents who apply for this choice assignment. Eight themes emerged from the analysis of 201 optional assignment applications over three school years which resulted in 409 coded responses. Child wellbeing and emotional stability, continuity of enrollment, and transportation and logistics were the most frequently cited factors across the three years of data collection. This reflected that families primarily are motivated by what to them feels safe, stable and manageable for their children and family needs. The school culture and fit theme grew each year and increased from 11 to 17 responses across the three-year span. This suggested that family perceptions of school environment played an increased important

role in optional assignment decisions. Sibling connectedness, parent employment at the requested school, and IEP or special education service needs and wants also emerged as important factors for certain families.

The findings that all eight elementary schools were represented across all eight themes of the qualitative data confirms that optional assignment is a district-wide pattern and not isolated to one or a few individual schools or populations. These findings are supported by the theoretical frameworks and literatures established in Chapter II that found that families weigh both practical and social-emotional factors when making a school-choice decision.

These findings will be applied in SCASD by using the eight themes as a framework for increasing communication with all families about the optional assignment process and making sure it is clear and easy to find on the district's website.

Understanding why families apply allows the district to respond more equitably. For example, by examining whether families with IEP or special education needs are being truly supported at their zone school, or by reviewing whether transportation barriers are creating unequal access to optional assignment opportunities will provide administration and the board a deeper understanding for data-based decisions when they review the current practices and procedures for the optional assignment policy.

Research Question 2

How do the racial and socioeconomic demographics of elementary students requesting an optional assignment compare to the demographics of the zoned elementary schools? Findings for this study analyzed 183 optional assignment applicants with known race or ethnicity and revealed that the demographic profile of families pursuing optional

assignments does not reflect the district's overall enrollment composition. The chi-square goodness-of-fit test confirmed that this difference was statistically significant and showed that all families are not accessing the optional assignment policy at equal rates. White students who make up 76.1% of district enrollment were underrepresented among applicants at 61.7% meaning the percentage of applicants is below their enrollment share. However, Asian students applied at nearly double their district enrollment proportion and Black students applied to approximately three times their enrollment rate. Asian students currently represent 9.1% of district enrollment but made up 16.9% of applicants and Black students represent 2.7% of the district but made up 8.2% of the applicants for optional assignment. Asian and Black applicants disproportionately requested Radio Park (Asian) and Easterly Parkway (Black), the district's two most diverse buildings. These are also the buildings carrying the heaviest concentrations of students with additional needs including special education, ELL, and economically disadvantaged status. Easterly Parkway's economically disadvantaged rate of 42.7% is almost double the district average of 22.9% and more than three times greater than Gray's Woods which has grown only slightly in economically disadvantaged percentage across the three years of the study. This gap was evidenced in all three years of the data collected. White applicants, however, were overrepresented at Gray's Woods and Spring Creek, the district's two least diverse buildings, while Ferguson Township, similarly low in diversity, received the fewest optional assignment requests of any building at just four students total.

The findings will be applied in SCASD by presenting the results to the district administration and the Board of Directors and recommending that the Director of Equity, Inclusion, and Belonging review the optional assignment process to determine whether

barriers such as language access, awareness of the policy, or the application procedures themselves are limiting participation among underrepresented families. The Director of Equity, Inclusion and Belonging should work with the Assistant Superintendent of Elementary Education who oversees the process to further evaluate the data through an equity lens and determine the appropriate next steps for the district.

Research Question 3

How does the optional assignment policy impact the demographics and academic outcomes of elementary school buildings? The findings from the analysis of the building-level demographics, staffing, funding, and academic outcomes across the district's eight elementary schools revealed several consistent and meaningful patterns. The results showed that optional assignment students are not evenly distributed across buildings. Easterly Parkway accepted and enrolled the highest number of optional assignment students at 33 total, which represented 22% of all optionally assigned students district-wide. Radio Park was the second highest with 30 enrolled, and Ferguson Township accepted the lowest requests at a total of four.

The demographic composition of currently enrolled optional assignment students also varied considerably throughout the eight schools. Of the 150 optionally assigned students currently enrolled, 101 or 67.3% identify as White, 13 or 8.7% Asian, 13 or 8.7% multi-racial, 12 or 8.0% Black, and 10 or 6.7% Hispanic, and 1 or .7% unknown which is unaccounted for in the data. In total 49 of the 150 or 32% of currently optionally assigned students identify as non-White.

At Easterly Parkway, 48.5% of optionally assigned students are non-White, with Black students making up 30.3% of that building's optional assignment population. At

Radio Park, 36.7% of optionally assigned students are non-White, with Asian students as the largest non-White group at 16.7%. In contrast, however, only 5.3% of optionally assigned students at Gray's Woods are non-White, and all four optionally assigned students at Ferguson Township identify as White. These building-level patterns in optional assignment demographics parallel the applicant patterns identified in Research Question 2 and reinforce the conclusion that optional assignment choices are not demographically neutral across the district's eight buildings.

The district has a per-pupil expenditure rate of \$18,735.83, and the 150 optional assignment students represent \$2,810,374.50 in per-pupil funding that follows students to their chosen buildings. Easterly Parkway has the largest share at \$618,282, followed by Radio Park at \$562,075, Park Forest Elementary at \$374,717, Gray's Woods at \$355,981, Corl Street at \$337,245, Mount Nittany at \$281,037, Spring Creek at \$206,094, and Ferguson Township at \$74,943. This funding distribution is directly tied to where optional assignment students choose to enroll and has direct implications for staffing and resource allocations across buildings.

The findings for the academic outcome data showed significant differences across the eight elementary schools. In ELA, three-year PSSA average proficiency ranged from 56.8% at Gray's Woods to 76.5% at Ferguson Township with the district average at 68.9%. In mathematics, the three-year average proficiency ranged from 54.9% at Easterly Parkway to 78.4% at Ferguson Township compared to the district average of 66.2%. The one-way ANOVAs confirmed that average PSSA scale score differences across the eight buildings were statistically significant in both ELA and mathematics across all three years, with $p < .001$ in all six tests. Spring 2025 MAP data showed a similar pattern with

math RIT scores ranging from 210.3 at Easterly Parkway to 219.1 at Radio Park. The ELA RIT scores ranged from 198.2 at Easterly Parkway to 209.0 at Radio Park. Both were confirmed statistically significant by the one-way ANOVA.

It is important to note that when optional assignment students were compared directly to non-optionally assigned students using matched PSSA records and independent samples t-tests, none of the six tests produced statistically significant results. Spring 2025 MAP comparisons showed a consistent pattern. Optional assignment students scored 2.1 RIT points below non-optionally assigned peers in math and 3.6 points below in ELA. Neither difference reached statistical significance. This is a significant finding because meaningful academic performance differences did exist across all buildings, but optional assignment students themselves do not perform significantly differently from their non-optionally assigned peers at their chosen buildings. The building-level differences in academic outcomes do not appear to be driven by the optional assignment population; instead, they reflect patterns in how students and resources are distributed across the district's eight elementary schools.

One pattern that emerged across the findings of Research Questions 2 and 3 warrants specific attention. Black students, who are overrepresented among optional assignment applicants at more than three times their district enrollment share, disproportionately request and enroll at Easterly Parkway which is the building that also shows the lowest three-year average PSSA proficiency in mathematics at 54.9% and second lowest in ELA at 59.4% behind Gray's Woods at 56.8%. While the decision to pursue an optional assignment reflects the personal and community-based motivations identified in Research Question 1, the concentration of Black optional assignment

students in the district's lowest-performing building raises an important equity question that the district's administration and Director of Equity, Inclusion, and Belonging should examine closely as part of any future policy review.

These findings should be reviewed by administration and presented to the Board with the recommendation that the Director of Equity, Inclusion, and Belonging, along with the Assistant Superintendent for Elementary Education and the Director of Business and Finance, review whether staffing and resources across the eight elementary buildings adequately reflect the needs of the students they serve. It should be noted that Easterly Parkway carries the district's highest concentration of economically disadvantaged and non-White students and holds the most favorable student-to-staff ratio at 4.3:1, while Radio Park serves a similarly diverse population but carries the district's least favorable student-to-staff ratio at 8.2:1. This is a disparity that warrants administrative review. The data make it clear that optional assignment students are concentrated in certain buildings, that per-pupil funding follows those students, and that significant academic performance differences exist across buildings. When reviewed together, these patterns provide the district with enough information to have informed discussions regarding whether the current optional assignment policy and its resource distribution are structured in a way that supports equitable outcomes for all students across all eight elementary schools.

The fiscal implications of this study are directly tied to the movement of per-pupil funding across the district's eight elementary schools. At a per-pupil expenditure rate of \$18,735.83, the 150 currently enrolled optional assignment students represent \$2.8 million in funding that follows students to their chosen schools rather than remaining at their zoned buildings. Funding following the students is standard practice in SCASD, but

when that funding is combined with uneven distribution of students and differences in building demographics and academic outcomes, the district should ask whether every building is getting what it truly needs. Buildings that serve higher percentages of economically disadvantaged students, English Language Learners, and students with IEPs may require additional resources to move beyond equal treatment toward more equitable support. If the additional data indicates a need for change, any adjustments to staffing, professional development, data systems, or policy would be addressed through the district's budget development and review process and shared with the Board to ensure transparency and alignment with district priorities.

Limitations

This study provided valuable insights regarding the State College Area School District's optional assignment policy; however, several limitations exist and must be acknowledged. The limitations provide important information regarding how they influenced the interpretations of the results.

To begin, the study was conducted exclusively in SCASD, which is not only a single district but also has a long-standing optional assignment policy. While the equity patterns identified in this study are consistent with what the literature in Chapter II found in districts across the country, the specific demographic proportions, building make-ups, and policy conditions in SCASD are unique to the district and should be considered when interpreting how broadly these findings apply.

Another limitation is that the researcher for this study serves as the Assistant Superintendent of Elementary Education in SCASD and is the individual responsible for approving or denying optional assignment requests. This dual role as both the researcher

and district administrator presented a potential source of bias that must be acknowledged. To mitigate this, the study relied exclusively on data the district had already collected rather than researcher-designed instruments or surveys, which was the most direct way to reduce the influence of positional bias on the findings.

A third limitation involved the qualitative data analyzed for Research Question 1. That data consisted of responses from optional assignment applications submitted to the Assistant Superintendent of Elementary Education's office for consideration. These responses were not collected for research purposes and varied considerably in length, detail, and specificity. Some families gave one sentence for their explanation while others offered several paragraphs to explain their reasoning. This created an unevenness of depth and reasoning across the three years. Additionally, since these reasons were submitted as a way to persuade the district to consider the optional assignment, families may have stated their reasoning in ways they believed would strengthen their request rather than providing a fully factual account of their decision.

Additionally, while Research Question 2 examined the racial and ethnic demographics of optional assignment applicants, socioeconomic status was not formally tested in the same way. The chi-square goodness-of-fit test was applied to racial and ethnic data, but a comparable statistical analysis was not conducted for socioeconomic status due to limitations in how that data is collected and reported at the district level. The only available economically disadvantaged data the researcher was able to use was building-level percentages rather than individual student status. Since individual student-level data was unable to be obtained, the socioeconomic patterns described in this study are descriptive rather than statistically tested, which limits the conclusions that can be

drawn about the relationship between socioeconomic status and optional assignment participation.

The study examined three years of data from 2022-23 through 2024-25. Even though this data provides a three-year window into trends across the district, it does not capture the full history of the optional assignment policy, which has been in place within SCASD for over 20 years. Patterns that emerged or shifted prior to the years reviewed within the study are not reflected in the findings.

Another limitation is that this study relied solely on existing district data, which means the ability to build a complete profile of the typical optionally assigned student in SCASD was limited. While demographic information such as race, ethnicity, and building placement was reviewed, other individual characteristics such as prior academic performance, attendance history, IEP status, ELL designation, and length of time as an optionally assigned student were not consistently captured or analyzed as part of this study. Without that complete picture, it is difficult to identify patterns in who the optionally assigned student truly is across the district and whether certain groups of students are more likely to seek and receive an optional assignment than others. Future research that builds a more complete individual student profile for optionally assigned students in SCASD would strengthen the district's understanding of how the policy is being used and by whom.

A related limitation is that the voices of families who successfully navigated the optional assignment process were not captured in this study. The qualitative data analyzed in Research Question 1 came from written application responses that reflect what families chose to share in a formal request rather than their full experience of the

process. The study did not include any interviews, surveys, or focus groups with families who have lived the optional assignment experience from applying through fully enrolling in their chosen school. Without those perspectives, the district has an incomplete understanding of whether the process itself feels accessible, welcoming, and equitable to the families who use it.

Finally, the per-pupil expenditure rate used to calculate the fiscal implications of optional assignment enrollment was applied as the same rate of \$18,735.83 for all students. The actual costs associated with serving students with special education services, English Language Learner supports, or other related services were not considered in the building-level calculations. This means the fiscal analysis provided is accurate but may underrepresent the true resource implications for buildings serving higher concentrations of students with additional support needs. Additionally, the study did not collect data on staff and administrator experience, instructional conditions, or turnover, all of which have the potential to influence outcomes at each building. The absence of that data means the academic achievement differences identified across buildings could be influenced by factors other than what the existing data was able to capture. Future research that includes this additional data would provide a more complete understanding of the differences across the eight elementary schools.

Recommendations for Future Research

To build upon the findings of this study and support the broader research on intradistrict optional assignment policies, several important questions should be considered. The answers to these questions would provide a foundation for future research. The recommendations are drawn from the conclusions and limitations of this

study and are intended to build on what was learned within SCASD from this research.

To begin, this study was limited to three years of data for each strand of the mixed-methods design. The timeframes, however, did differ slightly. The qualitative data from Research Question 1 was drawn from optional assignment applications submitted from 2021-22 through 2023-24. The quantitative data for Research Questions 2 and 3 covered 2022-23 through 2024-25. Due to the availability of the quantitative data, this was intentional and appropriate. It does mean, though, that the two strands do not reflect an identical window of time. A longitudinal study that examines optional assignment trends across a broader and unified timeframe, ultimately expanding to cover the full years since the implementation of the policy, would provide a more complete picture of how the policy has functioned and potentially evolved in SCASD over time.

Next, because socioeconomic status could not be formally tested at the individual student level due to data collection limitations, future research should study whether a relationship exists between family income and optional assignment participation in SCASD. The gap identified in Research Question 2 is that while the chi-square goodness-of-fit test confirmed statistically significant differences in the racial and ethnic composition of optional assignment applicants, a comparable analysis could not be conducted for socioeconomic status because the only available economically disadvantaged data existed at the building level rather than the individual student level. The researcher did seek permission to obtain individual student-level socioeconomic data for this study; however, the request was denied with the reasoning being student privacy protections under the Family Educational Rights and Privacy Act (FERPA). As a result, only building level economically disadvantaged percentages were available for analysis.

If the district were able to capture and report individual student socioeconomic data in a way that could be linked to optional assignment applications, a stronger equity analysis could be conducted. This would provide a more thorough understanding of which families are and are not accessing the optional assignment policy and whether income plays a role in optional assignment participation that the current data was unable to confirm or rule out.

A third recommendation comes from the fact that the study did not collect data on the experiences of teachers, staff, or building administrators across the eight elementary schools. Future research that incorporates staff surveys, interviews, and possibly focus groups would provide important insight into how optional assignment practices influence instructional conditions, staff workload, and building culture. Understanding the teacher and staff experience is particularly relevant given that building-level academic outcome differences were identified in this study but could not be fully explained by the existing data alone.

Another recommendation comes from the qualitative findings from Research Question 1. Through the research and findings of this question, eight identified themes reflected why families pursue optional assignments; however, the voices of families who were denied optional assignment or those who did not apply were not a part of this study. Future research that interviews families who chose not to apply or who did apply and were denied would provide a broader understanding of how the policy is perceived across the full range of SCASD families and whether barriers to access exist that the current data does not reveal. One approach to consider would be a district-wide elementary survey administered to all families regardless of optional assignment status. A simple

survey like this could capture whether families are even aware that the optional assignment policy exists, what their understanding of the process is, and what factors, if any, have prevented them from applying. The fact that the optional assignment policy currently only exists on the district website under the Registration/Enrollment section, but no other proactive communication is evident raises the question of whether all families have equal awareness of and access to this opportunity. A district-wide survey such as this that measures family awareness of the policy would be a first step in determining whether a more intentional communication is needed to ensure equitable access across all eight elementary schools. In addition, focus groups conducted with families who have successfully gone through the optional assignment process could provide rich, first-hand insight into what the experience was like, whether the process felt accessible and equitable, and what improvements families would recommend. These conversations would add a depth of understanding to the quantitative patterns identified in this study that application data alone cannot provide. This type of outreach would not only inform future research but could also provide the district with actionable data to improve communication, accessibility, and equity in how the optional assignment policy is shared and understood across all eight elementary school communities. Additionally, a brief survey administered to families at the conclusion of their optional assignment placement process, whether their request was approved or denied, would provide the district with explicit feedback regarding whether the process is clear, fair, and accessible. A survey that collects this feedback each year would allow SCASD to identify trends in family experience over time and make continuous improvements to the optional assignment process based on the perspectives of the families it serves.

Future research should also examine the academic trajectories of optionally assigned students as a distinct group over time. While this study found no statistically significant difference between optional assignment and non-optionally assigned students on matched PSSA records or Spring 2025 MAP data, those comparisons were limited to a single point in time. A longitudinal analysis that tracks the academic growth of optionally assigned students across multiple years using both PSSA proficiency data and MAP growth data would provide a more complete picture of whether the decision to pursue an optional assignment supports, hinders, or has no measurable impact on individual student academic outcomes over time.

Additionally, future research could examine whether differences exist in the social-emotional wellbeing of optionally assigned students compared to their non-optionally assigned peers. SCASD currently collects SEL data across its elementary schools, and that data has not yet been analyzed through the lens of optional assignment status. Understanding whether students who attend a school outside of their designated attendance zone experience differences in sense of belonging, peer connection, or social-emotional skill development could provide the district with a more holistic view of how the optional assignment policy affects the whole child and not just the academic outcomes of the child or school.

Finally, as SCASD moves toward a potential review of its optional assignment policy, a follow-up study conducted after any policy changes are implemented would allow the district to measure whether those changes resulted in more equitable applicant demographics, more balanced building compositions, and more consistent academic outcomes across the eight elementary schools. This kind of follow-up research would

allow SCASD to determine whether the changes made in response to this study's findings are working and whether the goal of a more equitable optional assignment process is being achieved.

Summary

This chapter presented the conclusions, limitations, and recommendations for future research as a result of a mixed-methods study of the State College Area School District's optional assignment policy. The study examined three years of optional assignment application data, building-level demographic data, student-level demographic data, and academic achievement data across the district's eight elementary schools. The findings confirmed that families pursue optional assignments for a wide range of personal, logistical, and relational reasons with no single factor driving the decision. The data also confirmed that the demographic profile of optional assignment applicants does not reflect the district's overall enrollment composition. It is also important to note that Black students applied for optional assignment at more than three times their district enrollment percentage and were disproportionately enrolled at Easterly Parkway, which recorded the lowest three-year average PSSA math proficiency of any building in the district. This pattern warrants careful attention from the district's Director of Equity, Inclusion, and Belonging as part of any future policy or equity plan review.

Optional assignment students are not evenly distributed across the eight buildings and significant academic performance differences exist across buildings. Additionally, optional assignment students do not perform significantly differently from non-optionally assigned students within those buildings. This indicates that the building-level differences are not an optional assignment problem; instead, they are potentially a resource and

distribution problem that exists throughout the district.

The limitations of this study are important to consider when interpreting the findings. The study was conducted only within SCASD and relied on existing district data. It did not include information from all of the families who did not to apply or were denied. The researcher's dual role as both the investigator and the administrator who approves optional assignment requests presented a potential source of bias that was mitigated by relying entirely on data the district had already collected. Additionally, socioeconomic status could not be obtained at the individual student level due to FERPA restrictions, and the fiscal analysis, while accurate, did not account for the additional costs of serving students with special education, ELL, or other support needs.

The recommendations for future research are intended to build directly on what this study found and where the data showed gaps. Longitudinal research that spans the full history of this policy, individual student-level socioeconomic analysis, staff and administrator experience data, family awareness surveys, focus groups, and an examination of SEL outcomes for optionally assigned students would each contribute to a more complete understanding of how this policy functions and who it truly serves.

Overall, the goal of this study was not to eliminate optional assignment in SCASD but to provide the administration and Board of Directors with data-informed findings that support more equitable outcomes for every student across all eight elementary schools. The findings presented will serve as a starting point for an equity-driven conversation that the students and families of SCASD deserve. This study should serve as the first step in ongoing conversations regarding how the district ensures its optional assignment policy works equitably for every family and every child so that it is fully aligned with the

district's mission to ensure every student has opportunities to grow, thrive, and fulfill their potential through caring, responsive education.

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APPENDICES

APPENDIX A

IRB Approval

Pennsylvania Western
University Institutional
Review Board
250 University Ave, California, PA 15419
IRB@pennwest.edu

9/2/2025

RE: IRB Approval: Exempt Research Protocol

Protocol Title: *Exploring the Impact of the Optional Assignment Policy on School Enrollment and Equity in the State College Area School District*
IRB Tracking Number: PWIRB25015-DY-EX
Program: Ed.D.
Approval Date: 9/2/2025

Approved Study Period: 9/2/2025 to

5/31/2026 Dear Ms. Danielle Yoder,

On behalf of the Institutional Review Board (IRB) at Pennsylvania Western University, I am pleased to inform you that the research proposal noted above has been reviewed and determined to qualify as Exempt Research under 45 CFR 46.104(d)(4).

The PennWest IRB has approved this study for data collection during the dates listed above. Should you wish to expand the study to include additional institutions or extend the data collection timeline, please submit a formal modification request for IRB review and approval prior to implementing those changes.

This research is approved under the oversight of Pennsylvania Western University's Institutional Review Board (IRB00003711), operating under a Federal-wide Assurance (FWA00032724) filed with the U.S. Department of Health & Human Services (IORG0003094). Please retain this letter for grant, publication, or institutional documentation purposes.

You are expected to conduct your study in accordance with the ethical principles of the Belmont Report and all applicable institutional and federal guidelines. If you have any questions or need further assistance, please contact us at IRB@pennwest.edu.

Sincerely,

Nikolas C. Roberts, Ph.D.

Director, Institutional
Review Board Pennsylvania
Western University
roberts_n@pennwest.edu

APPENDIX B

Data Collection Plan & Timeline Document

RESEARCH QUESTION(S)	TYPES OF DATA TO COLLECT	DATA SOURCES (detailed explanation of the types of data you will collect)	TIMELINE FOR COLLECTING DATA
1. What factors influence families' decisions to pursue an optional assignment for their child(ren)?	Qualitative	The researcher will collect and review three years of past optional assignment applications on families' decisions for the optional assignment. This information is contained in a spreadsheet held in the Assistant Superintendent's office.	February 2 – February 20
		These responses, already gathered as part of the standard application process, will be analyzed to identify common reasons and request patterns.	February 20 – February 27
		The researcher will use thematic coding to group responses into categories. The researcher plans to include charts and tables to show the frequency analysis of the trends.	Feb 28 – March 13
2. How do the racial and socioeconomical demographics of elementary students requesting an optional assignment	Quantitative	The researcher plans to use descriptive statistics to summarize the racial and socioeconomic demographics of students requesting optional assignments compared to those enrolled in their zoned schools. This data can be pulled from our	Feb 20 – March 6

compare to the demographics of the zoned elementary schools?		student information system. The information will be added to a new data collection sheet that contains all students who were optionally assigned over the past three years. Tools such as bar charts and trend lines will visually represent these comparisons. The researcher will also use a chi-square test to assess whether significant demographic differences exist between the groups.	Mar 9 – Mar 20
3. How does the optional assignment policy impact the demographics and academic outcomes of the elementary school buildings?	Quantitative	The researcher plans to use statistical analysis to examine the measurable impacts of the optional assignment policy on elementary school buildings. The researcher will use descriptive statistics and trend analysis to summarize patterns in staffing, enrollment, funding, and academic performance. Key metrics will include student-to-teacher ratios in each building, total staff per building, annual enrollment by grade, per-pupil expenditures, and standardized test scores. The researcher will then complete comparisons between schools first with and then without optional assignment, and will utilize an ANOVA test to identify significant differences.	February 20 – March 13 March 2 – March 15

		The researcher may include additional analysis to explore relationships between optional assignment enrollment and building-level outcomes.	March 2 – March 20 (if needed)
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