

Florida's K-12 Market Faces New Pressures as Districts Lose Students



By [Alexandria Ng](#) — October 09, 2026 ⌚ 16 min read



— Liz Yap for Education Week and DigitalVision Vectors

When Orange County Public Schools realized it was losing thousands of students a year, the Florida district didn't just start planning for lower enrollment. It started trying to win them back.

As one of the many Florida school systems losing enrollment faster than they have in decades, Orange County hired a company to help recruit families back into the system. Through phone calls, visits, and an “aggressive marketing campaign,” the effort persuaded 1,932 students to return this year, almost 300% more than the roughly 500 the district had initially expected, Superintendent Maria Vazquez said.

“We agreed that we would pay [the company] for any student that enrolled and stayed with us for the first 30 days ... just over \$900 [per student],” she said.

At the same time, however, the district has closed seven schools, explored additional closures, and begun experimenting with microschools and other specialized offerings to make its schools more attractive to families.

The changes reflect a broader shift underway in Florida's K-12 market. Declining enrollment, an expansion of school choice, tighter district purchasing, and new rules around artificial intelligence and curriculum adoption are changing both how schools operate, and how education companies sell into the state.

For vendors, these shifts represent both significant challenges and potentially fruitful opportunities in one of the nation's largest K-12 markets.

Florida has about 2.8 million students enrolled in its public schools across 67 school districts, the nation's third biggest K-12 market. Many of those districts are among the largest in the country. Miami-Dade, Broward, Hillsborough, Orange, and Palm Beach counties all rank in the top 10 nationally for enrollment.

Companies looking to work with Florida school districts will be operating in a more fragmented market as new conditions play out, and vendors will, more than ever, have to prove that their product works, that it solves a specific problem, aligns with Florida's standards, supports implementation, and delivers a measurable return, according to industry officials.

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Enrollment Declines Change District Strategy

Orange County, the state's fourth-largest school district with almost 191,000 students, has lost about 19,000 students over the last four years. Superintendent Vazquez said the district was down about 7,700 students this school year after losing about 5,000 the year before.

That's put a dent in the district's budget.

"We've also had to cut teachers and support staff because the student enrollment was not there," Vazquez said.

The district is not alone. Other large Florida systems, including Miami-Dade and Broward, have also seen significant enrollment declines, with Miami-Dade down by nearly 19,000 students compared to last year, and Broward experiencing a drop of 12,300 students.

Vazquez attributed the changes to several factors, including declining birth rates, housing affordability, changes in immigration rules and patterns, and the growing availability of publicly funded alternatives to traditional public schools.

Similar pressures are showing up elsewhere in Florida. Miami-Dade County Public Schools, for example, enrolled about 2,550 students arriving from other countries in 2025-2026, down from nearly 14,000 the previous year and more than 20,000 the year before that, according to district figures reported by the Associated Press. The district's former superintendent also pointed to declining birthrates and the area's rising cost of living as factors in its enrollment losses.

The decline has forced districts to rethink not only how many schools they operate, but what they offer students, Vazquez said.

Part of Orange County's effort to diversify opportunities offered to students includes opening up microschools, or small, specialized learning environments that typically serve a limited number of students, in existing school buildings, particularly where the district has unused capacity.

The district has also expanded or replicated specialized programs, including magnet schools, as it tries to give families more reasons to stay, Vazquez said.

The strategy reflects a broader shift in the way districts think about enrollment, said Andrea Messina, executive director of the Florida School Boards Association.

School boards are increasingly looking at education as a collection of different options that can be tailored to families, she said.

"They want individualized programs to meet individual students' needs," Messina said.

For education companies, this may mean that districts are looking for products that help them retain students, fill special programs, or build new offerings, but they're doing so with fewer students and tighter budgets.

Orange County has cut its district-level budget by about 5% over the past two years, Vazquez said. The district has also been evaluating programs and eliminating those that do not produce enough return.

"No. 1, we look at the outcome of that particular product," said Orange County Superintendent Vazquez. "If it is something that impacts our students, we look at various student achievement data to determine if the outcomes are aligned or if there were positive outcomes from the use of that product."

Angie Gallo, a school board member for Orange County Public Schools, described the procurement environment as "much more selective."

"Every dollar that we spend has to bring value to our classrooms and to our teachers and to our students," Gallo said. "Every dollar has to bring back a return on investment."

That return means demonstrating that a product addresses a specific instructional need and produces measurable results. And such scrutiny is extending into vendor contracts.

Orange County has been moving toward outcomes-based contracting, Vazquez said. Under this model, a vendor could agree to a specific student outcome, while the district agrees to an implementation protocol.

If the district follows the agreed-upon protocol but students do not achieve the promised outcomes, the vendor would receive a lower payment than if those goals were met.

The burden has shifted beyond having features that districts want, Vazquez said. Now, companies have to define what success looks like and be able to demonstrate that they can deliver results.

"If [there's] not a clear set of data that will help meet a need that we currently have in OCPS, we're not going to talk to you," Gallo said.



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Angie Gallo, Orange County Public Schools school board member

A New Market of Buyers

For years, selling into Florida's K-12 market largely meant selling to school districts. While that remains a major part of the market, it is no longer the only way education dollars reach students.

The state now has several voucher programs serving students with different needs, including its universal private school choice program and the Personalized Education Program, which allows eligible students who are not enrolled full-time in a public or private school to use scholarship funds for approved educational expenses.

The programs have created a more decentralized market for products and services purchased outside traditional district procurement. Families can spend scholarship dollars on items such as instructional materials, tutoring, and online learning, with the program's 100,000-student participation cap scheduled to disappear in future years, according to the Florida Department of Education.

[Step Up For Students](#), one of the organizations that manages Florida scholarship programs, reported administering choice scholarships for more than 520,000 students across its programs as of early 2026. Applications for the 2026-2027 school year opened Feb. 1, and more than 300,000 students had applied by Feb. 10, including both new applicants and students seeking to renew their scholarships.

Colyn Ritter, a research analyst at school choice advocacy organization [EdChoice](#), said companies looking at Florida need to pay attention to what families are actually buying with their education dollars, not just which schools they choose.

"The school choice market is just completely opening up," he said.

Microschools are part of that shift, Ritter said. Companies can potentially work directly with microschools and other smaller education providers, while districts themselves, like OCPS, are increasingly considering microschools as a way to use excess building capacity and offer families more options.

For example, Orange County Public Schools opened a microschool in August, which serves about 50 students. Operated out of Cheney Elementary School in Orlando, the microschool focuses on baseball and softball and is run by two academic teachers and two athletic coaches.

The growth of these programs, however, is putting pressure on traditional districts, which still have to maintain schools and cover many of the costs that do not disappear when enrollment falls.

The expansion of vouchers has fundamentally changed the way education dollars move through the state, said Norin Dollard, a senior policy analyst at the [Florida Policy Institute](#), a nonpartisan nonprofit organization that researches and analyzes state budgets, taxes, and economic policies.

The state's education market may be becoming more fragmented as the number of potential customers and purchasing channels fluctuate, she said. Dollars are being increasingly distributed across different types of providers rather than concentrated in traditional district budgets. The result puts additional pressure on school systems' bottom lines.

"School districts have to have a balanced budget ... But how do they do that when there are things like fixed costs, and where funding effectively is going down because of vouchers?" she said.

Districts Face Budget Pressure

Florida's education system has seen an increase in funding, but that rise does not necessarily translate to more money for districts to spend on new products and services, officials said.

According to the state's 2026-2027 K-12 budget, state funding per student increased by \$150, or 1.64%, to \$9,338.

But the growth in state funding has to be weighed against rising costs and the changing mix of students and funding streams, Dollard said.

"The rate at which their costs increase is far outstripping the increase in the base student allocation," Dollard said.

That distinction matters for education companies, she said. A state can increase the amount it spends on education without giving individual districts substantially more discretionary money to spend on new products.



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Norin Dollard, senior policy analyst, Florida Policy Institute

For districts experiencing enrollment losses, the problem is especially pronounced, Dollard said. Fixed costs do not decline, and while closing schools can reduce expenses, districts still have to maintain buildings, operate transportation systems, and pay employees while making decisions about how much capacity to retain.

Districts are responding to the pressure by cutting positions, reducing course offerings, and looking more closely at what they can afford to provide, said Andrew Spar, president of the Florida Education Association.

"Things have gotten harder," Spar said. "There's been a real disinvestment in public education in Florida."

He said districts are also dealing with larger class sizes and higher costs for health care and other expenses.

The financial constraints are changing what districts can consider purchasing, Spar said. He expects some districts to put more emphasis on basic instructional materials and hands-on learning, particularly for younger students.

Materials that support handwriting, notebooks, and collaborative activities could see more interest as schools reconsider how much technology students need during the school day.

Districts are not abandoning technology, Spar said, but rather being more deliberate about how they use it. The goal should be technology and AI that “actually enhances learning and doesn’t replace student learning with technology,” he said.

Florida Sets New Rules for AI

In September, the state board of education adopted new statewide rules governing the use of artificial intelligence in school districts.

Districts must adopt policies that notify parents when an AI instructional tool is approved, including the tool’s name, the courses in which it will be used, and how students will interact with it. Parents must be given an option for their child to instead use a non-AI alternative.

The rules prohibit vendors from selling student data or using it to train agentic models, and prohibit AI designed to simulate companionship or emotional relationships with students.

The state is also directing districts to evaluate educational technology based on demonstrated learning outcomes and instructional value and to use evidence of effectiveness in procurement and renewal decisions.

Districts are increasingly demanding evidence that an AI product is improving learning, said Marlee Strawn, a former Florida teacher and administrator and co-founder of [Scholar Education](#), which builds AI infrastructure designed for special education.

And the new rules could make involving parents a more important part of the sales and implementation process, she said.

“Districts are going to have to ask themselves, ‘How do we offer an equal opportunity if a parent does opt out of a technology that is bringing value to the student?’” Strawn said.

Florida’s AI push is happening alongside growing national concern among school leaders and parents about how much time children spend on technology and devices.

Gallo, school board member of Orange County Public Schools, said she would like to reduce or eliminate one-to-one devices for younger students, while maintaining technology where it is needed for testing and other purposes. The district is currently studying whether it can reduce one-to-one device use in elementary schools, she said.

“The issue is not simply whether a product is digital, but whether the technology serves a clear instructional purpose,” Gallo said.

That distinction is reflected in the state’s new AI framework as well. Florida’s rules direct districts to distinguish between recreational technology use and instructional technology, and to evaluate instructional tools based on learning outcomes rather than screen time alone.

Florida Keeps Tight Grip on Curriculum

Florida’s curriculum market is showing signs of change, even as the state maintains a powerful role in deciding which products can compete.

The state's 2026-2027 K-12 mathematics adoption attracted 198 bids, according to the Florida Department of Education. The final state adoption list includes established publishers, like [McGraw Hill](#), [Savvas Learning Company](#), and [HMH](#), as well as newer and less-established providers and Florida-specific products.

Among the providers on the new math list are [Great Minds](#), with its Eureka Math Squared Florida materials, and [Kiddom](#), which submitted Kiddom Florida Math materials developed with [Illustrative Mathematics](#). [IXL](#) also has its new core offering, Takeoff by IXL: Florida Edition, while other providers have developed products specifically branded around Florida's B.E.S.T. standards.

Entering the Florida curriculum market can require companies to adapt their materials to the state's standards, develop Florida-specific versions of products, and build relationships with educators and districts, said Lora Kaiser, executive director of the [Center for Education Market Dynamics](#), which tracks and analyzes the K-12 curriculum market. Those investments can take years, particularly because adoption cycles are long.

"To play in the Florida market, it takes considerable resources," Kaiser said. "Adoptions are not things that are executed and won within six months."

The Florida-specific branding is more than marketing, Kaiser said. It reflects the extent to which publishers have to build around the state's B.E.S.T. standards and other requirements if they want to compete seriously for public school business.

Vazquez, superintendent of Orange County Public Schools, said her district, like many others, relies heavily on state-approved materials for its core curriculum.

"If it's not on the state-approved list, we do not touch it," she said.



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Maria Vazquez, superintendent, Orange County Public Schools

For newer providers, Kaiser said, differentiation is key. Companies need to demonstrate that their products meet Florida standards, but also that they offer what competing products do not. That could mean stronger evidence, implementation support, or a product designed around a specific district need.

Districts are also paying closer attention to how different instructional materials work together across the school day, Kaiser said. She expects districts to focus not only on the quality of core curriculum materials, but also on "instructional coherence," or whether core materials, supplemental resources, and assessments reinforce the same learning goals across different tiers of instruction.

That could lead districts to take a harder look at whether additional products are actually necessary, and how well they fit with the materials already in place, she said.

Florida's curriculum market is also facing another potential shift as the state reviews its science standards.

The Florida Department of Education launched a statewide listening tour in September as part of a comprehensive rewrite of the K-12 B.E.S.T. Science Standards, the first comprehensive rewrite in nearly two decades. The state is

seeking input from parents, teachers, scientists, professors, and employers, and has released proposed standards for public review, Kaiser said.

The review could affect how topics including evolution and climate science are represented in future standards, both politically contested areas of Florida's curriculum policy. The changes are not yet final.

For publishers, the process creates another moving target. Products that are developed for Florida's public schools will eventually need to align with whatever standards the state adopts, Kaiser said.

The state board of education also approved updates to Florida's K-12 social studies standards earlier this year, and the state is now moving through additional standards-review work.

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For the 2027-2028 adoption, publishers submitted 113 intents to bid for K-12 social studies materials, with the formal call for bids and specifications now underway, according to the Florida Department of Education.

Tax Reform Adds Another Variable

Districts are also watching a potential change to Florida's local tax structure.

Amendment 3, on the November ballot, would increase the homestead exemption for non-school property taxes from the current \$50,000 to \$150,000 in 2027 and \$250,000 in 2028, with the latter amount adjusted for inflation.

It would also lower the annual assessment-growth cap on non-homestead property from 10% to 5%. The amendment specifically excludes school property taxes from the expanded exemption.

While the implications for school districts are indirect, Dollard said counties and municipalities use their share of property tax revenue to support services that can intersect with schools, including mental health services, after-school programs, and other services that districts may rely on through partnerships or shared funding.

If local governments have fewer resources available for those services, districts could face additional pressure to absorb costs or concentrate their own spending on core instructional needs, she said.

A Market in Transition

Florida's K-12 market is seeing a redistribution as more students and education dollars are moving among a wider range of schools, providers, and purchasing decisions. Traditional districts are being pushed to compete harder for enrollment and demonstrate more clearly that the programs they buy are worth the money.

For Orange County, these changes are already impacting how the district thinks about its future of competing for students with more education options, while having fewer resources to do so.

"With limited dollars, we now have to narrow the scope of resources that are available," said Orange County Superintendent Vazquez.

The district's efforts to recruit back 1,932 students suggests that some families can be won back. But enrollment, funding, and school choice continue to shape the market, and vendors will have to keep making the case for why school districts, or families, should choose them, and how the dollars they spend will show a return.



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