



Choice and Accountability in Canadian Education

Literature Review

CHOICE AND ACCOUNTABILITY IN CANADIAN EDUCATION (CACE)

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by

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PREFACE

Issues related to school choice, program choice, and accountability are increasingly recognized as being central to discussions on how to improve primary and secondary education in Canada. As a means of contributing to this discussion, the Choice and Accountability in Canadian Education (CACE) Project was undertaken (a) to document the range of school choice, program choice, and accountability policies and practices in all provinces and in 11 urban centres and (b) to provide a review of the policies, practices, and findings that will inform future discussions and explorations of choice and accountability in Canadian education. The products of this work are presented in four related documents: this *CACE Literature Review*; the *CACE Report*; the *CACE Comprehensive Appendices*; and the *Reference Guide to Choice and Accountability in Canadian Education*. The *CACE Literature Review* is an extensive analysis of issues and research related to school choice. The *CACE Report* includes a summary of research on school choice; an overview of policies and practices in all 10 provinces, 11 urban areas, and 27 urban school districts; and a discussion of critical issues and findings related to school choice, program choice, and accountability. The *CACE Comprehensive Appendices* include documents related to methods used in the project, as well as reports on provincial and district policies and practices. The *Reference Guide to Choice and Accountability in Canadian Education* provides a snapshot of the current state of policies and practices related to school choice, program choice, and accountability, as well as summaries of related findings and issues. All four documents can be found at www.cup.ualberta.ca/resources_documents.html.

Introduction

School choice and accountability are topics on the education agenda around the globe. In this review of the literature we examine the reasons for the growing phenomenon of school choice that is occurring in so many countries. We also attempted to look at issues of accountability as they came up in the research on choice. The review is divided into three parts. The first part provides the reader with a general overview of how school choice is defined, the rationale for, and roots of the school choice movement as well as the assumptions behind it. In the second part we review the ways in which school choice has been implemented in five countries: Canada, the United States, England and Wales, New Zealand and Australia. The arguments and evidence that influence the policy decisions about school choice are discussed and evaluated. In the third part, we examine the outcomes of school choice as experienced in these countries. To illustrate specific outcomes, particular studies are described.

This literature review involved a manual library search, an Internet search, as well as an ERIC search for current literature on school choice, mostly within the last ten years. The literature we reviewed consisted mainly of empirical studies, studies using both quantitative and qualitative methods, and studies published in refereed journals or in recently published books. For the purpose of this literature review, five members of the Organization for Economic Co-operation and Development (OECD) were selected: Canada, the USA, England and Wales, New Zealand and Australia. These countries were chosen because they are predominantly English-speaking, and have relatively similar industrial, historical, and political conditions.

The literature that focuses on the parents' or students' right to choose is primarily about the right to select schools outside the public school systems. Though there is a body of literature about different types of programs in public schools, such as French Immersion or programs for students with special needs, the focus of those studies is on the efficacy of the programs, not the range or possibilities of choice. While this emphasis is understandable in the context of an emerging market ideology, it is an extremely limited portrayal of the scope and richness of the school choice movement. To limit our examination of choice in education to access and availability of private/independent schools, charter schools, home schooling, or voucher systems, is to ignore the real evolution that has been taking place in terms of the introduction and expansion of choice within and between schools in the public systems, particularly in Canada.

Ungerleider (2003) draws attention to the substantial, and increasing, choice available in public schools in Canada (pp. 184-186). Similarly, Ouchi (2003) points out the fallacy of assuming that choice does not exist within the public school systems in the US, and draws examples from jurisdictions in New York, Chicago, Los Angeles and Houston.¹

Overview of School Choice

What is School Choice?

According to the United Nations' *Convention on the Right of the Child*, parents and legal guardians are responsible for “the upbringing and development of the child” with the “best interest of the child ... their basic concern”. Therefore it is provided that “State Parties shall render appropriate assistance to parents and legal guardians in the performance of their child-rearing responsibilities and shall ensure the development of institutions, facilities and services for the care of children” (United Nations, 1989, Article 18.2).

Having the freedom to choose schools other than those that are state operated is recognized in the Universal Declaration of Human Rights (1948), which states, “Parents have a prior right to choose the kind of education that shall be given to their children” (Article 26, 3). This right is reasserted in the International Covenant on Economic, Social and Cultural Rights (1966), which affirms,

The States Parties to the present Covenant undertake to have respect for the liberty of parents and, when applicable, legal guardians to choose for their children schools, other than those established by the public authorities, which conform to such minimum educational standards as may be laid down or approved by the State and to ensure the religious and moral education of their children in conformity with their own convictions (Sect. 13, 3).

These international covenants support the concept of providing school choice to parents so that they can fulfill their responsibilities for the overall development of their children (Coleman, 1990).

School choice implies that policies are in place to give parents and families choice over how and where their children will be educated. In most countries school choice has always existed

¹ This limited and deficient understanding of school choice in Canada is evident in the Fraser Institute publication, *The Canadian Education Freedom Index* (2003).

for families through the option of educating children in private schools (for those willing and able to pay fees) and in some countries through home schooling (providing the education is approved by the state). However, over the past two decades, feasible alternatives available to families within the “education market” have broadened to include more choice within the public school systems, as the rules for choosing between public schools have been liberalized, with money following the students.² Examples include an “open boundary” school district where students may attend any school within a given school district providing there is space; a separate administrative unit within a school that has its own separate program and its own personnel (students and teachers) affiliated with the program of choice; schools that offer education based on a theme or specific curriculum focus such as the Montessori method, a modern language, the performing arts, or science and technology; schools that are established to meet the needs and/or interests of a particular group of students, parents or teachers; charter schools (that operate under a “charter” granted under a public entity or chartering authority such as a minister of education, a department of education, local school boards, universities, or colleges); and subsidies to private schools in the form of educational vouchers and tuition tax credits.

For the purposes of this literature review, school choice is defined as the ability of parents and children to choose a school or program administered by a public or private educational authority.

The Roots of School Choice

Educational reforms, including a demand for school choice, have been influenced by factors such as fundamental changes in the economy and social relations, pluralism, globalization, technological advances, and a rise in conservative politics (Ball, 1996; Giddens, 1994; Hargreaves, 1994; Raham, 1998; Walker & Crump, 1995). Over the past 20 years or more, many countries around the world have increased educational options available to school children, permitted families to move their children more freely from one school to another, and allowed schools to be run outside the jurisdiction of school boards. These school choice reforms have tended to change the balance of power in education from the “producers” to the “consumers”. Although this tendency varies in degree and form in each country, there are some common roots

²A phrase commonly used to mean the government education funds flow to the district or school that educates the student

behind the rise of school choice in many of the English-speaking industrialized countries. Three key issues influence these roots: a political/philosophical orientation, the fact that families are now more socially and geographically mobile, and increased diversity in societies.

From the 1980s onward there has been a rise in Neo-liberalism in countries around the world. Essentially, Neo-liberalism minimizes government interventionism that impedes the free flow of capital, commodities, or any aspect of culture (Hiller, 2000). The influences of Neo-liberalism in the areas of school reforms include a demand for fiscal restraint, downsizing of governments' and public institutions' role and size, deregulation, greater competition, attention to efficiency, and decentralization of power away from national, provincial or state governments. The argument is that better schools will emerge if competition and greater school choice are encouraged, and centralized control is reduced or eliminated (Fiske & Ladd, 2000). Competitive market forces are said to improve the quality of education for all students because schools with good reputations will receive more "customers" and more resources, thus there is more incentive to improve schools in order to remain competitive. In other words, families/parents who "vote with their feet" make schools more accountable.

As more people are becoming socio-economically and geographically mobile and tend to have a higher level of education, parents and families are demanding the right to choose their children's schools. There is a perception from parents and families that their children's future success and economic well-being in life depends on their education. Additionally, in consumer oriented societies families feel that they should have the power to choose and get what they can pay for (OECD, 1994). However, while reform programs postulated a growing sentiment of public dissatisfaction with the quality of education available in many countries, Levin (2001) points out that there is in fact little evidence to back up this claim in any setting.

As societies are, and continue to become, more diverse (in terms of culture, class, race, etc.) more parents and families are identifying the necessity of providing a variety of types of schools (with different pedagogical strategies; innovative curriculum; different foci, such as sports and the arts; etc.) that address the wide-ranging needs, abilities, and interests of their children and reflect the different values of families. Parents and families want more input into determining school characteristics. If diversity is recognized, then there has to be allowance for groups to educate their children somewhat differently than the regular state run schools, even when this seems to require "special treatment" (e.g., exemption from laws that burden these groups and

assist them to do things the majority can do unassisted (Kymlicka & Gordon, 2000: 25). Indeed, some people hold that it is inappropriate for the state to have a monopoly on the generation and maintenance of values, and therefore competition through publicly funded non-state schools cannot be denied (Berger & Neuhaus, 1996). Furthermore, there is a sense that since the state does not intervene in the home life of children (except in the case of neglect or abuse), it should behave the same with regard to education (Gorard, n.d.). Hence, it is assumed that school choice results in a diverse range of educational alternatives available to families and that school choice provides greater educational access to minorities and low socio-economic status families.

Accountability

While the word accountability has different meanings for different people, at its basic level it implies giving an account, being responsible or liable (Oxford English Dictionary, 2nd Edition), or “to be answerable” (Webster New Collegiate Dictionary, 7th Edition). Leithwood et al. (1999: 31) states that accountability means “giving a report on, furnishing a justifying analysis or explanation, proving a statement of explanation of one’s conduct, offering a statement or exposition of reasons, causes, grounds, or motives, or simply proving a statement of facts or events”. Accountability requires an evaluation, but when talking about evaluation one must ask, evaluation of whom, of what, under what procedures and according to whose criterion (Frymier, 1996). Additionally, Wagner (1995) asks, what level of accountability is to be provided? Who is expected to provide the account? To whom is the account owed? What is to be accounted for? What are the consequences for providing an account?

Accountability has been advocated for schools and school systems to demonstrate to the public how well tax dollars are spent in the provision of quality schooling and as a means of keeping schools “on their toes” in their achievement of goals and improving their processes and outcomes. The increased interest in accountability on the part of schools and school systems emerged in most developed countries (e.g., the USA, New Zealand, England and Wales, Germany) around the 1960s and early 70s and gained momentum in the mid and late 1980s. Although the timing of the emergence of this phenomenon in different countries was roughly coincidental, the reasons for its appearance were rooted in the specific social, economic and political contexts of each country. However, the influence of the New Right political orientation

appears to have been critical as an element in the drive for greater accountability in most of these countries (Leithwood et al., 1999).

According to Finn, Bierlein and Manno (1997), an accountability system has several aspects to it:

Clearly delineated content and performance standards; exams that mirror those standards; a blend of teacher-designated assessments of various types for classroom diagnosis and external tests [that are]...prepared and administered by people other than the school's own managers; timely and understandable results that can be compared over time with other schools, across jurisdictions, even internationally; and additional indicators of school success such as attendance, graduation rates, incidence of discipline problems, Advance Placement results, and so on (p.28-29).

Leithwood et al. (1999) take a broader perspective and describe three approaches to accountability. These include market competition approaches, decentralized decision-making approaches, and professional approaches.

The market competition approaches increase competition for students among schools. A specific tool is school choice, harnessed by opening boundaries within and across school systems, privatization plans, and the establishment of charter schools, alternative schools, etc. Competition is increased when the money follows the child from one school to the next (e.g., through vouchers and tuition tax credits). Schools therefore become directly accountable to the parents and students that they serve.

One of the central tenets of decentralized decision-making approaches is to increase the voice of those not heard or not sufficiently listened to in the current contexts of school governance. With community controlled or school-based management schools, professionals must be responsive to local values and preferences. School councils, in which parents and community members comprise the majority of membership, are the primary vehicles through which power is exercised. School-based management that is controlled by the administration, and where the school administrator is accountable to the school board or district, is another form of decentralized decision-making accountability. So are school and district profiles (similar to report cards) that are made available to the public. School and district profiles may contain information about input, process, and output and are means whereby the school or district can be held accountable to clients and potential clients.

The central concept of professional approaches is a belief in the contributions of professional practice to the schools and their outcomes. Professional control school-based management holds teachers and administrators jointly accountable to parents, students and school district offices for the effectiveness and efficiency of schools. Professional standard setting may provide accountability for control of entry into the profession, monitoring of professional practice and recognition of accomplished professionals. By establishing policies and advocating particular practices, a comprehensive professional accountability model establishes a culture that is knowledge-based and client-oriented and includes safeguards as well as incentives (Urbanski, 1998).

This literature review focuses predominantly on market competition approaches to accountability, although where relevant other approaches that are employed by the five countries discussed in the paper will be noted.

Realization of School Choice

Although there is a trans-national dimension to educational reforms, the implementation of school choice has varied between all countries and even between jurisdictions within a single country. Policy developments do not move smoothly from one nation, region or local area to the next due to the geography, demography and history of school provision (Glatter et al. 1997). Even when there appears to be a commonality of experience, there is great variability in educational reform policies across settings. It is also important to note that reform proposals do not always translate directly into practice. In some settings the adoption processes reflect some changes in the nature and/or timing of the proposed reforms due to opposition from various groups (Levin, 2001).

This section of this paper addresses the main school choice provisions in Canada, the United States, England and Wales, New Zealand and Australia. These include private schools, public (also referred to as government) schools, vouchers (also called educational vouchers or school vouchers), and charter schools. These terms are elaborated below.

Definitions

Charter School is loosely defined as a publicly sponsored and usually publicly funded autonomous school that is, to varying degrees, free of direct government control but is held accountable for achieving certain levels of student performance and other specified outcomes (Cookson, 1995).

Private School is used to refer to an autonomous or independent school. It is autonomous from the state system of education and is not run by a public school board. It may be independent for cultural, pedagogical, philosophical or religious reasons. Funding for this type of school may be derived partly from the state through public coffers and/or through private means. It may have varying degrees of autonomy and control over its budget, hiring of school faculty and personnel, curriculum or fund-raising.

Public School refers to a school that is owned and administered by an elected school board and funded at least partly by a Ministry of education. In this paper it is used interchangeably with government or state school.³

Educational Voucher refers to funding from public or private sources which follows the student to the school where s/he is enrolled. In some systems the amount of the voucher will depend on the child's socio-economic status, cultural and racial background, age, academic ability, gender, and learning disability. Additionally, the school's location, size and record of achievement could be considered.

Home Schooling refers to schooling where the parent has the responsibility of providing an educational program for their child(ren). Home schooling may or may not be under the supervision of a board, public school, or private school, and may or may not be directly regulated by the Minister of Education.

Charter Schools

Charter schools are schools that are publicly funded but operated by independent or quasi-independent organizations under a charter or contract with an entity empowered by state law to authorize charter schools. They are schools of choice and have the freedom to implement their chosen educational approaches. They often have more constraints than private schools when it

³ In Alberta, Ontario, and Saskatchewan, fully-funded Catholic schools are designated as "separate schools" and are part of the "public" school framework. Furthermore, in Alberta, charter schools are, as defined in *The School Act*, public schools.

comes to compliance with federal and state/provincial mandates, use of funds, accountability and reporting (Hassel, 2002). Charter schools are what Cookson (1996) terms “truly hybrid,” because although they are still within the public school structure, they rely on market principles to attract students. They provide autonomy and require accountability. Bierlein and Mulholland (1995: 34) stress the important contractual and autonomous features of charter schools thus:

In its purest form a charter school is an autonomous educational entity operating under a contract negotiated between the organizers who manage the school (teachers, parents, or others from the public or private sector) and the sponsors who oversee the provisions of the charter (local school boards, state education boards, or some other public authority).

Charter schools around the world share some similarities in the way they operate but there are also some significant differences. Within the U.S. alone there are several deviations from the original “charter school idea”. For example, some state laws disallow full per-pupil operating funding from following the child from school district to the school, prohibit capital funding from following the child, and deny legal independence of charter schools. Moreover, the laws in some states have “limited the number of charter schools that can open, the types of people and organizations that can propose charter schools or both” (Hassel, 1999: 250). These variations “reflect the unique political struggles over the meaning of this reform in each state and local community” (Wells et al., 1996: 8).

Canada

Alberta was the first, and as of yet the only, province in Canada to permit the establishment of charter schools. Presently there are 13 charter schools in Alberta. Other provinces such as Ontario and Quebec have considered charter school legislation proposals but have not yet passed any legislation allowing for their introduction. Under current Alberta legislation, a charter school is defined as an autonomous non-profit public school, operated independently under a performance contract approved by either the local school board or the minister of education, which provides education in a different or enhanced way than that which is available in traditional public schools. The charter school must fulfill all the terms of its contract in order to

have its charter renewed. It cannot be faith based and it must still follow Alberta Learning's Program of Studies, which allows students to transfer to or from any public school with a minimum of disruption. A charter school is eligible for the same provincial funding per student as any other public school and may not charge tuition fees (Canadian Charter School Centre, 2003; Alberta Learning, 2003).

United States

Unlike the handful of charter schools in Canada, the USA has more than 2,700 charter schools (American Charter Schools, 2003). Thirty-six states and the District of Columbia now allow citizens to establish charter schools (Brouillette, 2002). American charter schools emerged out of the magnet school concept, which was developed in the 1960s to decrease racial segregation in urban schools (Peterson & Campbell, 2001). Licensed teachers in Minnesota initiated the first charter school in 1992. The fundamental claim of American charter school advocates is the same as that of Canadians - that with competition (charter schools must compete with existing public schools), an incentive will exist for all schools to improve in order to attract and maintain students. A loss of revenue will be avoided and a greater degree of accountability will be evident. Teachers, parents, or third parties (i.e., non-profit organizations, small businesses, or large corporations) may initiate the request for charter schools. Examples of charter schools are those that offer home-based distance education learning, are run by teacher cooperatives, and/or cater to special populations. Approximately 40 to 50% of the Charter schools in the USA serve dropouts or youth at-risk of dropping out (Medler & Nathan, 1995; Finn, Bierlein, & Manno, 1997; Finn, Manno, & Vanourek, 2001). The pedagogy in these Charter schools ranges from “ultra-traditional to super-progressive” (Finn, Manno, & Vanourek, 2001: 25).

England & Wales

The grant maintained schools (GMSs) in England and Wales, which were established following the enactment of the *1988 Education Reform Act*, had parallels to the charter schools of North America and have served as an inspiration to the USA's charter school movement (Whitty, Power, & Halpin, 1998).

GMSs were regular public schools that had gone through the process of "opting out" of the control of the local education authority (LEA) in favour of obtaining grant maintained (GM) status. Opting out was initiated either by the governors (who are like school trustees) or by petition from parents. GMSs were run by governing bodies of trustees to whom the principals were responsible (Dobbin, 1996). GMSs' budgets came directly from the central government. Funding for the school was based on per capita enrolment and the numbers of children enrolled depended on the parents' choice of school. Since the *1988 Act* more power was given to the local management boards that could decide on how the budget would be spent and how education would be shaped and structured. Schools had to admit students up to the schools' physical capacity and could no longer arbitrarily impose limits on enrolment. The *1993 Education Act* began to encourage the supply side of the quasi-market by making it possible for the governors of existing private schools to establish sponsored GMS's, providing these sponsors found "at least 15 percent of the funding for the building and land and accept the regulations and constraints applicable to all other GMSs including following the National Curriculum" (Walford, 1996: 56). This 1993 Act also allowed for GMSs to establish themselves as "specialist" schools, which extended parents' choices (Taylor, 2002). In effect, the provisions for schools to become grant maintained were eased. However, even though parents had the right to choose the schools their children attended, the schools were given the right to limit the admission of students based on the students' academic abilities (Levin, 2001).

As with the charter school movement in North America, the benefits of GMSs were purported to be that market demand would raise standards, increase choice and competition and thus diversify and regenerate the local provision of education, and locate key decisions and innovation at the local level. Moreover, the push for GMSs was partly a response to the negative sentiments about the teaching profession and a populist demand for a return to basics (Chubb and Moe, 1992; Elliott and Maclennan, 1994).

Unlike the diversity of the newly established charter schools in North America that cater to special groups of students, GMSs were less likely to establish any specific changes related to curriculum or special focus and tended to carry on with the way they did things before changing to GMS status, often providing a traditional education.

When the Labour Party came to power, it abolished the GM status of the 1,200 GMSs in 1998. The government set up transitional funding arrangements to ease the schools back into local education authority control, but the central grant for that ended in December of 2002.

New Zealand

There are some parallels that can be made between the experience of charter schools in North America and the GMSs of England and Wales with New Zealand's charter schools. For example, each New Zealand charter school is self-governing and is free to innovate in response to the local community in much the same way as charter schools in Canada and the USA and the GMSs in England & Wales. However, unlike North America and the UK, the implementation of New Zealand's charter schools has been likened to that of an earthquake (Holdaway, 1989), sudden and fierce, with all schools affected in months rather than a few schools affected over a number of years. Also, unlike the charter schools in North America that are still few in numbers (e.g., in the USA charter schools represent only 2% of the public schools and only 1% of total enrolments) (Finn, Manno, & Vanourek, 2001:20), all New Zealand schools have charters and operate with a high level of autonomy.

New Zealand's education system underwent rapid and extensive restructuring in 1989 when the new Education Act came into force. This legislation was based on the document, *Tomorrow's Schools* - a response to the Picot Report (1988). The educational reforms were largely a response to the economic malaise of the country. The perception was that the economic problems could be addressed if (a) there were more efficiency and accountability in the public sector (Douglas, 1993), and (b) if the education system could adequately prepare citizens with education and training to help them better compete globally (Barrington, 1991). There was also a perception that the education system was over-bureaucratic, inequitable, and unresponsive (Ramsay, 1993).

Unlike the education reforms in North America and England & Wales, New Zealand's reforms had little educational substance (Whitty, Power & Halpin, 1998). Standards, selectivity and progressive teaching methods were not front and center. Furthermore, while business agendas were influential in educational reforms in Alberta and the UK, the role of big business in New Zealand's reforms was vital, as it was in the USA (Levin, 2001).

The reforms included a major shift of authority from the central Department of Education (later renamed the Ministry of Education) to the individual schools. Similar to the GMSs, two-fifths of the charter schools in the USA, and a number of the Alberta charter schools, the schools pre-existed so facilities were already in place. The Boards of Education were entirely eliminated while Boards of Trustees were established for every school. These boards consist of the principal, one elected teacher, and five elected parents. In high schools there is also an elected student (Levin, 2001). Subsequently, members of the business community became eligible for membership on these boards also (Whitty, Power & Halpin, 1998). The Boards make all spending decisions and are fully responsible for what occurs at the schools, including hiring and firing the principals and the teachers. They may buy services from the private sector, borrow money and fund capital development (Gordon, 1996). Teacher salaries continue to be paid directly by the national government, by means of block funding to the schools (Levin, 2001).

Each school is held accountable for achieving the goals set out in its Charter, as prepared by the school board. "The Charter can be changed only after a consultation process with the parents" (McTigue & Ladner, 2001: 2). The central Ministry of Education is responsible for providing funds to the schools based on student enrolment in the school, and it also audits the schools' performance checked against the school's charter goals.

The fact that the New Zealand schools had to become charter schools whether they wanted to or not marks a significant difference in the implementation of the reforms as compared to those in England and North America. The effect of compulsory chartering on outcomes is discussed later.

Australia

Education reform in Australia mirrored that of New Zealand. Australia's education reforms came about in the mid 1980s, during a time of corporate restructuring when corporations were centralizing, becoming more competitive and more responsive to customers. The state reduced

spending in all sectors (Marginson, 1996; Whitty, Power, & Halpin, 1998). In the late 1980s, there was devolution of control over funding so schools were given greater control over their finances, although the government still provided the majority of funding to schools. At the same time there was an increase in central control through the introduction of a national curriculum and centralized standardized testing.

In 1995 all schools in the country became charter schools, meaning that the school councils and the principals had to develop school “charters”. The council is made up of 15 members of the community (no more than one third of whom can be education system employees). This council is the chief executive body responsible for the policies of the school and for hiring a principal who is in turn responsible for school staff, curriculum leadership, school organization and resources (VG, 1993; Marginson, 1996; Whitty, Power, & Halpin, 1998). The council is responsible for 90% of expenditures (Caldwell, 1994). Government funding for the schools is based on enrolment numbers.

It is important to note that the cases of the UK and New Zealand are very different from choice options discussed in other countries. In the UK the GMSs did not come about primarily as a means of increasing choice for families. The establishment of GMSs was the mainly a result of the need to change the funding arrangement and to affect the role of the LEAs. Similarly, in New Zealand, the establishment of charter schools was more to do with governance and control issues rather than to provide real choice to families. Increasing school choice was a secondary concern.

Vouchers

Voucher systems are another method that have been used in some areas to enable parents to exercise choice in their selection of schools. There are different and sometimes opposing arguments used to support the use of voucher systems. Some see vouchers as a means for addressing equity for minority groups or families in poverty. Others espouse vouchers as a way to enable market forces to improve education. Voucher systems operate under different regulations around the world. The most common form of vouchers is an allocation of public funds to be spent on a child’s education that can be used at whatever school the child goes to; i.e., the funds follow the child. The vouchers may be a form of tuition aid to provide access to private schools, public schools or to both (West, 1996). These are most prevalent in the USA and in New Zealand, where they are referred to as Targeted Individual Entitlement Schemes (TIES).

Experimentation with a type of voucher scheme occurred in England and Wales, called the Assisted Places Scheme (APS). Although APSs no longer exist, they are discussed below to demonstrate the similarities to the voucher systems in the USA. In Canada, it has been suggested that an “invisible form” of vouchers exists in some jurisdictions.

Canada

In British Columbia, Alberta, Saskatchewan, Manitoba and Quebec, independent schools, whether they are denominationally-based or not, may be eligible for public grants on a per-student basis to cover operating costs (Robson & Hepburn, n.d). Historically, these funds have taken the form of direct per-student grants, akin to vouchers. These kinds of grants are called “invisible” because the funds are supporting education in private/independent schools in the same way as “visible” vouchers do but there is no lottery system or formal awarding of grants to individual students. Additionally, the province of Alberta provides some direct funding to home schoolers (approximately 16% of the amount spent on children in the regular school system). Ontario considered implementing a refundable tax credit for parents whose children attended independent schools, but eventually withdrew the proposal. The Fraser Institute administers a small, privately funded voucher plan in Ontario called Children First. It is based on a lottery and permits a small number of children in low-income households to attend private elementary schools by providing 50% of tuition fees up to \$3,500 per year (Fraser Institute website, 2003). Across the country, all families that send their children to independent schools are eligible for a federal charitable tax credit for the portion of independent school tuition at religious schools that is related to religious instruction, as well as a tax deduction for the portion of tuition that represents child-care costs (Robson & Hepburn, n.d).

United States

Both public and private voucher systems have been introduced in the USA. The difference between these systems is based on whether the financial support for the vouchers comes from public or private sources. In the year 2,000 there were more than 60 000 students receiving vouchers, approximately 50,000 of whom were in the privately funded programs and more than 12,000 of whom were in the publicly funded programs (Peterson and Campbell, 2001).

The three publicly funded voucher systems are found in Milwaukee, Wisconsin; Cleveland, Ohio and Florida. The Milwaukee Parental Choice Program (MPCP), established in 1990, is the oldest public voucher system in the USA. It has allowed thousands of low-income students from the city of Milwaukee to use vouchers, originally worth \$3,245 and now worth up to \$5,000 each per year, to attend private non-sectarian schools. These funds are diverted from the general school funds in the state. After battles in the courts (in 1996 and 1997) religious private schools were added as options to this program in 1998 (Hepburn, 1999; Peterson & Campbell, 2001). The Cleveland Scholarship program, established in 1996 was the first publicly funded program to include parochial and secular schools. It gives to nearly 2,000 low-income children residing in the city of Cleveland options for attending public or private (religious or secular) schools using cash vouchers worth \$6,507. The Florida program, in 1999, permitted a small number of students from “failing” schools (only 5 schools were identified as failing) to apply for vouchers to attend better schools. The number of students in this program has not increased because the term “failing” was re-defined and fewer schools fell into the category (Peterson and Campbell, 2001).

Individuals, foundations or corporations fund private voucher programs. The vouchers vary from between \$150 to \$4,000 and the participating private schools for which the vouchers can be redeemed charge from \$800 to \$6,000 for tuition fees, hence parents must contribute the remainder (National Scholarship Center, 1998). The children who receive vouchers leave public schools to attend independent/private schools. A well-known contributor to the private voucher program is the Children’s Scholarship Fund (CSF), which has awarded approximately \$165 million in scholarships since 1999. The average Children's Scholarship Fund scholarship is \$1,049. The average income of families participating is \$22,000 and they contribute on average \$1,315 to make up for the rest of the costs not provided by the scholarship. The amount of a scholarship is based upon a family's size, income and the school the family chooses for their child (Children’s Scholarship Fund, 2003).

According to the National Scholarship Center (1998), participants in the private voucher system are most likely to be low achievers with below average grades, low-income families, and often minorities living in the inner cities. The voucher programs are most favoured by low-income parents in districts with poor performing schools (Moe, 2001).

The rationale for voucher programs is that poor students will be given an opportunity to study in a school that they could not otherwise afford, and will thus be able to leave the ‘inferior’ public system. It is also alleged that schools in both the private and the public systems will improve, particularly when a significant number of children receive vouchers.⁴

The constitutionality of the voucher programs has been challenged. The concern is that the use of public funds in this way would have the forbidden effect of advancing or inhibiting religion, which is a violation of the first amendment requirement that there be no “establishment of religion”. The option to include religious schools culminated in the *Zelman v. Simmons-Harris* (June 2002) case in which the Ohio Supreme Court upheld (5-4) the Cleveland school voucher program, declaring that it does not violate the Establishment Clause of the First Amendment because it is neutral in respect to religion and permits parents to exercise “true private choice”.⁵ This ruling is likely to have a profound effect on education and school choice options in the United States. It has opened up possibilities for an expansion of programs that provide publicly funded scholarships to students to attend participating public or private schools.

⁴ One example that illustrates this is the case of Giffen School in Albany, NY where a private sponsor, Virginia Gilder, offered every child in the school a voucher. The result was that the school board had to be made accountable for its spending, had to make significant improvements to attract new students and hold the existing students or face closure. The result at Giffen School was the replacement of all 12 teachers and the administrator and \$125 000 being diverted from the school board budget to address the needs at Giffen (Carrol, 1997).

⁵ THE SUPREME COURT OF THE UNITED STATES, ZELMAN, SUPERINTENDENT OF PUBLIC INSTRUCTION OF OHIO, et al. v. SIMMONS-HARRIS et al. (CERTIORARI TO THE UNITED STATES COURT OF APPEALS FOR THE SIXTH CIRCUIT, No. 00—1751. Argued February 20, 2002—Decided June 27, 2002),

The instant program is one of true private choice, consistent with the *Mueller* line of cases, and thus constitutional. It is neutral in all respects towards religion, and is part of Ohio’s general and multifaceted undertaking to provide educational opportunities to children in a failed school district. It confers educational assistance directly to a broad class of individuals defined without reference to religion and permits participation of all district schools—religious or nonreligious—and adjacent public schools. The only preference in the program is for low-income families, who receive greater assistance and have priority for admission. Rather than creating financial incentives that skew it towards religious schools, the program creates financial disincentives: Private schools receive only half the government assistance given to community schools and one-third that given to magnet schools, and adjacent public schools would receive two to three times that given to private schools. Families too have a financial disincentive, for they have to copay a portion of private school tuition, but pay nothing at a community, magnet, or traditional public school. No reasonable observer would think that such a neutral private choice program carries with it the *imprimatur* of government endorsement. Nor is there evidence that the program fails to provide genuine opportunities for Cleveland parents to select secular educational options: Their children may remain in public school as before, remain in public school with funded tutoring aid, obtain a scholarship and choose to attend a religious school, obtain a scholarship and choose to attend a nonreligious private school, enroll in a community school, or enroll in a magnet school.

England & Wales

The Assisted Places Scheme (APS) was introduced in England and Wales in 1981 and discontinued in 1998. The APS project was similar to the USA's voucher programs in that it allowed private educational services to be purchased with public funds. The APS helped academically able children from low-income families to attend certain independent schools. The scheme was part of the 1980 Education Act and was expanded through the Education Reform Act 1988 (ERA). Through this Act, changes in the associated legislation of the APS gave every child a *de jure* right to attend any school in the country, including a number of private/fee-paying ones, and so was seen as extending choice to all children who were eligible. However, the APS was abolished in 1998, mainly as a cost saving measure, when the new government (Labour) passed its first education bill—the 1998 School Standards and Framework Act (Taylor, 2002).

Implementation of a voucher system more similar to the American system was contemplated in the early 1980s but was dismissed as it was seen as too complex (Chitty, 1997). However, the reform that linked open enrolment with per capita funding in 1990 was “as good as a voucher at least in term of the state education system because a monetary value was attached to each mobile student” (Carl, 1994: 308). Ball's description further illustrates this, “Each pupil who comes through the school gate will carry a cash bounty and the staffing, materials, facilities, and equipment the school wants or requires will then be paid for out of the money accumulated in this way” (1990:90).

New Zealand

The Targeted Individual Entitlement scheme (TIE), similar to the APS in England and Wales, is a form of voucher that was introduced in 1996 as a small, pilot program. The program allowed 160 children from low-income families (those whose taxable household income was less than NZ \$25,000, or CDN \$16,000, per annum) to be enrolled in the independent school of their parents' choice. The Ministry of Education paid the participating private schools 110 percent of the national average cost of education for each TIE student they took. It also provided the student's family with an allowance of NZ \$900 for primary students and NZ\$1,100 for secondary students, to cover additional expenses such as uniforms, books, and extra-curricular activities (Gaffney & Smith, 1998; Whitty, Power & Halpin, 1998). After it was deemed successful by the government, TIE was given funding in 1998 to continue indefinitely.

However, since a change in government at the end of 1999, no new students entered the scheme after the year 2000.

In 1998, the Maori Enhanced Targeted Individual Entitlement-Whakapiki Taurira- was established as a way to assist 130 underachieving Maori students. Participants in the Maori TIE scheme must be from a household with an income of less than \$25,000 and must identify themselves as Maori. The Maori TIE scheme differed from the parent scheme in that selection of students was centralized and the money provided was added to what the schools already received for educating these students. The students have to attend schools with a Maori Language and Culture Program. Due to a change in government, it is unclear whether the Maori TIE scheme will continue (Gaffney & Smith, 1998).

Australia

Australia does not have a voucher system in place.

Private Schools

Canada

In Canada in 1998-99, there were a total of 5,69,716 students enrolled in elementary-secondary schools. Of these, 297,798, or 5.6% of the total enrolment, were in private schools (StatsCan, 2000). Private schools account for approximately 4% of the total primary school enrolment, and 6% of the total secondary school enrolment (UNESCO, 2000).

Each province has different rules regarding private or independent schools. The following is a brief summary of each province's policies on funding of private schools. In Newfoundland, Prince Edward Island, New Brunswick, Nova Scotia, Northwest Territories, and Yukon Territories, independent schools receive no provincial or territorial funding. Ontario does not provide any financial assistance. In Quebec, accredited private schools are eligible to receive funding. The base amount has varied according to size of the provincial grants to the public schools. In Manitoba private schools that comply with government regulations receive 80% of the per pupil grant paid to public schools (in the year 1998). In Saskatchewan, of the 4 types of independent schools (registered, accredited, historical and alternative), only the historical high schools and the alternative schools that comply with set criteria receive public funding. In Alberta, accredited private schools receive 60% of the regular per-pupil grant paid to public and

separate schools. Non-accredited but registered private schools receive no grants. In British Columbia there are 5 different classifications of private schools. Groups 1, 2 and 3 are funded and groups 4 and 5 are non-funded. Group 1 is made up of mainly religious private schools which receive 50% of the per student operating cost in the public school district within which they operate. Group 2 includes special educational schools, traditional private schools and small schools with a low student-teacher ratio (e.g. university preparatory schools, Aboriginal schools). These schools receive 35% of the per pupil operating costs of the local school district. Group 3 is made up of other schools that undergo evaluations every year but do not follow the Ministry's curriculum and teacher certification requirements. These schools receive 10% of the per pupil operating cost in the public school district where they are located (Nowers & Bell, 1993).

Interestingly, the amount private schools spend for each student was about the same as the amount public schools spend. For every \$100 public schools spend on each pupil private schools appear to spend about \$101 (StatsCan, 2000).

Children enrolled in private schools come from across the income spectrum. Twenty nine percent of children who attend private schools are from families with annual incomes below \$50,000, while 26% are from families with annual incomes of \$100,000 or more. The proportion of children who come from families with an annual income between \$50,000 and \$100,000 is 45%. Ontario, with 37% of the students in private schools coming from families with income in excess of \$100,000, has the highest proportion of children in this range in the country (StatsCan, 2000).

Quebec has the highest percentage of children enrolled in private schools (9.2%), while British Columbia has the second highest (8.8%). The figures from British Columbia include Roman Catholic schools as private schools, while in other provinces they are considered public. In all but two provinces (New Brunswick and Saskatchewan), there appears to have been a steady growth in the enrolment of students in private schools between 1987 and 1999 (Federation of Canadian Independent Schools website, 2003).

United States

In the USA, 11% of the total school-age population is enrolled in private schools. This is over 5 million children in total. Twelve percent of the total primary school enrolment attends private schools and 10% of the total secondary school enrolment attends private schools

(UNESCO, 2000). Private Catholic schools account for about half of all private enrolments. Roughly 20% of all private schools have secular foundations (Whitty, Power, & Halpin, 1998). As a consequence of the rule of separation of church and state, private schools in the United States do not receive public funding.

England and Wales

In England and Wales, 7% of school enrolments are in private schools. Five percent of all primary school students and 8% of secondary school students attend private schools (UNESCO, 2000). Private schools in Britain are referred to as “public schools.” There are approximately 2400 fee-paying independent schools. These schools receive no funds from the state but are inspected by the Ministry and must meet certain minimum requirements. Those who teach in independent schools do not need to have qualified teacher status.

These schools are considered to provide a socially and academically superior education compared to the private sector. Griggs (1985) indicates that they are most often attended by the sons and daughters of the gentry and the extremely wealthy. Although, children from lower income families do get into these private schools from time to time but they make up a small portion of the enrolment (Griggs, 1985). Day fees have risen by an average of 6.9% annually for the past 4 years, more than the current rate of inflation, which is 2.9%. On average the fees stand at £2,936 a term according to the Independent Schools Council (ISC). The ISC’s member schools educate 80% of pupils in the private sector. Families of students boarding in private schools pay on average £16,776 a year. Despite the increase in fees, the number of children in private schools has increased from 571,600 in 2001 to 580,300 in 2002. This represents 7.09% of the country’s 8,187,200 pupils (BBC, 08/28, 2003). Private schools use academic criteria as well as social and economic factors.⁶ Griggs (1985) points out that the only certain way for parents of lower-income groups to get their children into major private secondary schools is to find some way of paying for 5 years of fees in prep schools because state schools do not follow the same syllabus as private schools and do not specifically prepare children to take the Common Entrance exam at age 13, which most private schools use as an entry requirement. Griggs adds, “The oft

made claim that private schools are particularly interested in helping poor scholars just cannot be substantiated by an examination of the scholarships available at the HMC [major private] schools in Britain” (p. 41).

New Zealand

New Zealand has 129 private schools where 4% of school-age children are enrolled. Two percent of the total primary school enrolment and 5% of the total secondary school enrolment attends private schools (UNESCO, 2000). Since 1976, the private schools have been receiving varying levels of support from the government. This has been in the form of teacher salary grants. Although the government stopped providing the grants from 1990-91 the newly elected government in 1991 reinstated the grants with the intention of raising it to 50% where circumstances permit (OECD, 1994). Private schools, which are mostly Catholic, have had the option of “integrating” into the State system since 1975, with the ability to retain some aspects of their distinctive identity. However, some private schools have not integrated as it requires that they meet some of the restrictions set out by the state, such as increased class sizes. The state protected existing public schools from competition from the newly integrated schools by fixing a maximum roll number and limiting to 5% the proportion of their pupils who could come from non-Catholic backgrounds.

Australia

Australia has the highest number of private schools compared with other OECD countries. Private schools account for about 31.2% of total student enrolments (National Report on Schooling in Australia, 2001). Twenty six percent of the total primary school enrolment and 34% of the total secondary school enrolment attends private schools (UNESCO, 2000). Seventy percent of the private schools are Catholic and a significant number are single-sex schools. These private schools mostly charge low fees and the population they serve are generally of low and middle class backgrounds.

⁶ Critics charge that private schooling in England is socially divisive, offering privileged groups unfair access to elite forms of education. It is asserted that buying a place in private schools is buying a ticket to success. For example, 66% of the Members of Parliament (1998) have had a private school education, while the total percentage of the population with private education of the UK is only 5% (Education in Britain, n.d.).

Since 1973, the Australian federal government has provided subsidies to all private (non-government) schools and the governments of each of the six states match these subsidies. The subsidies are distributed in inverse proportion to the private resources of the school. Every school receives some public money. The original objective of this support was to boost the quality of education in the private sector and rescue and maintain a large sector facing financial difficulties. Although the constitution forbids public support of religion, the courts ruled in the late 1970s that this did not exclude support for children's education in private schools that have religious leanings. This ruling also meant that private religious schools, other than Catholic, could receive public funding. Since 1976, there has been an increase in the number of non-Catholic private schools and these tend, on average, to cater to a more affluent clientele (OECD, 1994). Since 1990, the number of private schools in Australia has risen by 137, while the number of public schools has fallen by 548 (Australia Stats, 2003).

Home Schooling

Home education represents another option for parents – the choice to educate their children at home rather than rely on public or private schools (Master, 1996). It is rapidly re-emerging in developed nations around the world.

Home schooling gives parents more control of what, when, why, where and how their children are taught. According to Russo and Gordon (1996) the majority of families in the USA that home school their children do so for religious reasons although Stevens (2001) found in his American study that more families are home schooling these days because they feel they can do a better job than the public or private schools.

Canada

In Canada over the past 20 years or so, there has been an increase in the number of parents who have decided to be the primary educators in their children's lives. Ray (2002) estimated the number of students to be between 50 000 and 95 000 during the 2000-2001 school year. This wide range in estimates is explained by Smith (1996), who suggests that official estimates are based on the ministry records which include only officially registered home schoolers, yet "most home-school sources would suggest that the figures are, in reality, much higher, since many

parents do not register, preferring to maintain their independence by operating entirely outside the school system and government control”.

A trend that is evident in Canada is that there are far more home-schooling families in the West, particularly in Alberta and British Columbia, than in other parts of the country. In B.C., there is a preference among home schoolers to register at the smaller, mostly Christian, independent schools rather than with the local school. In Alberta, many parents have shown a preference for registering with "willing non-resident boards" and with private denominationally-linked schools. In Alberta, home schooling is defined in the School Act (Sect.29). Home schooled students in grades 1 to 9 who are registered receive 25.7% of per pupil instructional grant. Students in grades 11 and 12 who complete 35 credit units also receive that amount. Grade 10 students receive 22.4%⁷ (Gloria Chalmers, Personal communication, September 2003). All home-schooled students must follow a government-approved curriculum.

Home schooling has always been legally possible in Canada. However within the last fifteen years, the legislation, regulations and guidelines have become clearer and more accommodating of parental wishes. Home schooling is officially recognized as an acceptable educational option within the education acts of Saskatchewan, Alberta, British Columbia, and Yukon Territory. The remaining provinces and the Northwest Territories have developed specific programs, guidelines, or regulations to accommodate home schooling within the structure of their current education acts that allow for the exemption from public school attendance where a child is under "efficient," "equivalent," "satisfactory," or "adequate" instruction at home or elsewhere (Smith, 1996).

United States

According to Lines (1998), the home schooling movement has grown steadily over the past few years in the USA. The estimated number of home-schooled children (grades K-12) for the 2001-2002 school year was between 1.725 million and 2.185 million [Home School Legal Defense Association (HSLDA) website, 2003].⁸ In addition to these, there are many families

⁷ Additionally students in grades 7 to 12 can access additional funds at the rate of 50% of the cost of AB Distance Learning Correspondence courses to a maximum of \$1,143 (Gloria Chalmers, Personal communication, September 2003).

⁸ Home education has grown steadily over the last two decades. The growth rate is reported to be between 7% and 15% per year. According to Dr. Brian Ray, president of the National Home Education Research Institute, there were approximately 1.5 to 1.9 million children (grades K-12) home educated in the United States during the 2000-2001

who home school while serving as missionaries, in the military, or when employed by the U.S. State Department overseas.

The laws governing home schooling vary widely from state to state. Some states have no requirement for parents to initiate any contact with the state, while some require notification, test scores, and professional evaluation of student progress.

In addition to the state laws, there has been a push for enhanced federal laws that govern home schooling. For example, on August 1, 2003, Republican Senator Larry E. Craig introduced the Home School Non-Discrimination Act of 2003 (HONDA). The official purpose of the bill is to amend selected statutes to clarify existing Federal law as to the treatment of students privately educated at home under state law. HSLDA supports the HONDA, declaring:

There are currently several areas of federal law that unfairly impact home education. Congress must pass the Home School Non-Discrimination Act (HONDA) to remedy this unfair treatment. Much of these problems arise because Congress has overlooked home schoolers while drafting legislation. The number of home-school students has grown from just a handful in the 80's to approximately 2 million today. Furthermore, their academic success is remarkable. Congress should no longer overlook home schoolers as a viable and successful movement. Home schoolers do not want federal handouts, just equal treatment. HONDA will bring federal law up-to-date with changes in the state education systems, particularly regarding the home-schooling movement (HSLDA website, 2003).

England and Wales

According to the HSLDA UK webpage (2003), there are between 20,000 and 100,000 children being home schooled in all of the United Kingdom, though Brian Ray, president of the National Home Education Research Institute in his recent book, "Worldwide Guide to Homeschooling" (2002), provides a much lower estimate of between 13,000 and 50,000. Education law and regulations regarding home schooling are made by the government but are generally interpreted and implemented by local authorities. The law is completely vague and merely requires that children receive an education "suitable for their age and aptitude, at school or otherwise". Families home schooling their children have successfully practiced under the term "otherwise". There is no requirement to inform the authorities when one is home educating.

school year. If you take this range and multiply it by 15% growth you will get the estimated number for the 2001-2002 school year (HSLDA website, 2003).

Often, if the authorities find out that a family is home schooling, the family will get a visit from the Local Education Advisor to ensure that the child's education is adequate.

New Zealand

Home schooled children comprise approximately 1% of the total school age population in New Zealand. The legal context for home schooling is fairly positive. A parent applies for a home-school exemption by completing a ten-question form for the purpose of helping the Ministry of Education determine whether the child is being educated according to the law. The compulsory attendance age law states that the child "will be taught at least as regularly and as well as in a registered school". The words "regularly" and "well" are not legally defined. The practice and application of these terms are inconsistent and vague, opening the law to a future challenges. Home schoolers are not required to follow the National Curriculum Guidelines.

The Ministry of Education pays parents NZ \$763 per year for the first child being home schooled and a lesser amount for subsequent children. This money is not taxable. To be eligible for this sum parents must sign a statutory declaration every six months which states they are still home schooling their children "as regularly and as well as in a registered school". The Education Review Office reviews about 12% of home-schooled children in any one year (HSLDA, 2002).

Australia

The number of children being home schooled in Australia is estimated to be between 35,000 and 55,000 (Ray, 2002). The laws regulating home schooling in Australia are being tightened up (HSLDA, 2002). In Queensland, home-school educators must be registered teachers. In New South Wales, the home-school guidelines created by the Board of Studies must be followed, even though these guidelines are not actually enforceable by law. In South Australia, home-school educators are involved in the consultation process with the government to prepare guidelines that are fair and reasonable.

Impacts of School Choice

In this section, we examine the impacts of each type of school on both students and the parents or community. We then look at the cost and accountability of school choice implementation. We draw on examples of research from countries that highlight both successful and problematic aspects of school choice implementation.

Students

The Impact of Charter Schools on Students

According to the Canadian and American literature reviewed, the impact of charter schools has generally been positive in terms of student achievement and students' level of satisfaction.

For example, Bosetti (2000) conducted a two-year study on Alberta's charter schools, funded by the Society for the Advancement of Excellence in Education and the Donner Canadian Foundation. Bosetti used a multi-case approach to document the context, characteristics, challenges and effectiveness of nine of the ten charter schools in the province. Triangulation of the data was done through document analysis, observation and semi-structured interviews with parents, teachers, administrators and other "stakeholders." Bosetti's findings suggest that charter schools are associated with student performance that is on par with or better than what would be expected given the students being served.

A two-year study conducted by da Costa and Peters (2003) supports Bosetti's findings. Their study was initiated by the Society for the Advancement of Excellence in Education and funded by the Max Bell Foundation. The researchers compared the achievement of students enrolled in the ten charter schools in Alberta to students in the local district, as well as students across the province, using provincial testing measures. They concluded that students in eight of the ten charter schools met or (in the cases of three schools) exceeded the provincial *Acceptable Standard*. Based on provincial test scores from 1997 to 2001, students enrolled in charter schools scored above average in subjects such as English, Science, and Social Studies (Smyth, 2003). Additionally, charter school students outperformed their peers on standard exams in 60% of the 180 comparisons the researchers made between 8 of the charter schools and other provincial schools over a 3-year period (Smyth, 2003). da Costa and Peters caution that it may be dangerous to make comparisons between charter and non-charter schools because the population of non-

charter schools is more heterogeneous in some of the critical educational variables than in charter schools. For example, one can “assume a very high parental support and involvement in the charter schools, a factor which research demonstrates contributes significantly to educational achievement” (da Costa & Peters, 2003: 146). It is impossible to rule out “systematic bias” as a source of relatively high or low student achievement in charter schools, which makes it difficult to draw comparisons between Alberta’s charter and non-charter schools. They also suggest that cohort analysis, such as that reported by Smyth (2003), is premature, “given the instability of the enrolment in the early years and given the small number of students that constitute a true cohort over any three-year span” (p. 145).

In the USA, Vanourek, Manno, Finn and Bierlein (1997) concluded that charter schools have served children well who have had bad educational experiences elsewhere. These children are of all races, backgrounds, and abilities. They include “low income, ‘at-risk’, minority children, children with learning disabilities and behaviour problems, etc.” (p. 1). The authors add that among the students who performed poorly in their previous schools, half are now (as judged by their parents) doing “excellent” or “above average” work. The authors warn however that test scores were not looked at and compared in this study and no national or state summary is available as yet.

Vanourek et al. (1997) also concluded from their data of American charter schools that satisfaction levels among students (as well as parents and teachers) are “wide and deep” and there is a consensus that charter schools are living up to their expectations and delivering a high quality service, “or at least improving on the alternative” (p. 9).

In summary, Canadian study results indicate that students in Charter schools generally achieve at least as well as, and sometimes better than, their peers across the province. Researchers caution that comparisons between charter and non-charter schools may be problematic given the increased homogeneity of charter school students, especially in terms of parental support, a variable known to affect student achievement. American surveys of parents, students, and teachers in charter schools have led researchers to conclude that satisfaction levels are high and the perception is that half of the children who struggled in the regular school system are performing better in the charter school. There was no American data on achievement levels of charter school students.

The Impact of Voucher Programs on Students

As previously discussed, the U.S. and New Zealand are the two countries that have significant voucher programs, so this discussion will be limited to research in those two countries. The impacts of voucher programs on students, particularly in the USA, have generally been seen as positive. Thirteen of the studies looked at (11 of which were done in the USA) reported positive outcomes for students. No Canadian studies were found.

In the USA, voucher programs generally reveal encouraging outcomes in respect to test scores. Howell, Wolf, Peterson, and Campbell (2001) looked at student test scores after one and two years to examine the estimated effects of switching from a public school to a private school with partial vouchers (funded by private sources) on elementary children from low-income families living in three central urban centers (New York City, NY; Dayton, Ohio and Washington, DC). The researchers assert that because the students had received their vouchers by lottery, the program evaluations could be done in randomized field trials. The “self-selection problem” (i.e., the intangible factor of the families’ willingness to pay for their children’s tuition and all that implies about the importance they place on education) was diminished by the random assignment of students to test and control groups (p. 137). The evaluation team had collected baseline data on student test scores and family background characteristics before conducting the lotteries. The researchers conclude that African-American students benefited the most from the vouchers.⁹ After two years, these children’s test scores showed “roughly one third of the

⁹ Carnoy (2001) highlights several concerns about the Peterson et al findings. He cautions that the results may misrepresent gains that typical low-income African-American students can make by switching to private schools. The methodology is “laced with potential biases” (p.2). Carnoy’s main concern is that the students in these experiments are not representative of low-income urban families, as families that apply for vouchers are motivated to switch and are more dissatisfied with their children’s schooling than average low-income families, most of whom do not apply. Another problem is that “low-income students who do better in private schools may do better because private schools are able to select their students so the influence of peers on student achievement is more positive than in a public school” (p. 6). The vouchers cover only a portion of the private school tuition so many families who received vouchers could not use them. Voucher-takers have higher incomes than non-takers. Moreover, Carnoy adds that a “truly blind experiment” as in medical experiments where control groups are given a placebo and do not know whether they are receiving the actual treatment or not is not possible since families know whether they are getting the vouchers or not. This lack of a truly blind experiment, Carnoy asserts, results in the Hawthorne Effect whereby the participants’ knowledge that they are involved in a program designed to produce a positive impact can cause them to try harder. Additionally, Carnoy points out that the researchers corrected for no-shows (the voucher receiving students who did not come back for the follow-up tests). Carnoy states, by correcting for no-shows, “it assumes that follow-up test scores for the many who didn’t take the tests would be the same as scores for those who did show up and had similar initial scores and parent characteristics. But we really don’t know how follow-up scores

difference in test score performances between black and whites nationally” (p. 152). The researchers did not find any significant academic effect on any other ethnic group.

Other random assignment studies support the findings of Howell et al. (2001). For example, a study conducted by Mathematics Policy Scholarship Program on the children participating in the New York City center private voucher system confirmed the existence of academic benefits for African-American students. Greene (2001), who conducted random-assignment choice experiments in Charlotte, North Carolina, also found that the students given vouchers by lottery to attend private schools outperformed their counterparts by six percentile points after the first year. Greene adds that since more than three-quarters of the students in the study were African-American, he could not draw any conclusions about possible academic effects for students who are not African-American.

Additionally, random-assignment data from the public voucher program in Milwaukee showed significant gains for students who used the vouchers to attend private schools (Greene, Peterson, & Du, 1998; Rouse, 1998). Greene et al. (1998) compared the test results of applicants accepted in the voucher program by lottery to those rejected by lottery. The test score gains in math and reading after three or four years in the voucher program were significant for those students enrolled in the program compared to those that were denied a voucher. The gains were quite large (11 normal curve equivalent [NCE] points in math and 6 NCE points in reading over a four-year period, put another way, one half standard deviation in math and one quarter of a standard deviation in reading). One of the weaknesses of this research is that the findings are based on 40% of the voucher students and 45% of the control group students and an assumption was made that the missing test scores were not significantly different than of those for which the data were available (Greene, 1999). Rouse (1998) analyzed the same data and arrived at the same conclusion for the math scores but not reading scores. The main difference between the Greene et al. study and Rouse findings is that Greene et al. adjusted test scores to be age appropriate. Greene (1999) notes, “variations in the practice of holding back students in the public and private schools could significantly alter results” (p. 127).

Witte (1999) also examined test scores in the Milwaukee choice program, specifically non-random comparisons (controlled for a limited set of background characteristics), and concluded

of no-shows might be related to their not showing up. The negative non-participant rates could easily have affected the relative gains of voucher recipients and non-recipients” (p. 5).

that vouchers had no significant effect on students. He writes, "On a positive note, estimates for the overall samples, while always below national norms, do not substantially decline as the students enter higher grades. This is the normal pattern in that usually inner-city student average scores decline relative to national norms in higher grades" (pp. 236-37).

Metcalf (1999) concluded that in the Cleveland choice program, voucher receiving students in existing schools had significantly higher test scores in language and science (6 national percentile ranking [NPR] and 4 NPR respectively), although these results are weakened by the fact that there are no random assignment data or sufficient data on the background characteristics of choice and public school families.

In the USA, studies in Cleveland, New York, Dayton, Milwaukee and Washington, DC indicate that low-income families were targeted for the voucher programs and these students were generally performing in the bottom third academically (cf. Peterson, Myers & Howell, 1998; Howell & Peterson, 2000; Wolf, Howell & Peterson, 2000; Greene, Howell & Peterson, 1998), which indicates that "creaming" (a major concern often cited by opponents of voucher programs) is not an issue.

In New Zealand, according to Fiske and Ladd (2000), there is evidence of "cream-skimming" despite the fact that the TIE program was established to assist lower income families. "Cream-skimming" occurs within low-income groups since the most likely participants of the TIE program are from educated and higher-skilled low-income families. This is because schools insist on choosing which students attend their school, especially private schools which are explicit about choosing only the most talented students. In effect then, the TIE program ends up subsidizing the most talented of the poor students.

Gaffney and Smith (2001) report that students in New Zealand selected into the TIE scheme were often from families of single parents, reasonably well educated at the secondary level, and from a range of socio-economic backgrounds (a median annual income of NZ \$15-20,000). Half of TIE participants were *Pakeha* (European ethnicity) and the other half consisted of Maori, Asian, and European-born parents. Gaffney and Smith report that the TIE scheme was quite successful at recruiting Maori and Asian students, as they were better represented among TIE families than in the national education statistics. Eleven percent of the first and second cohort withdrew, while 1% of the third cohort withdrew. Students who dropped out of the TIE scheme did so as a result of a number of different factors such as health reasons, transportation problems,

financial pressures, or social harassment. Generally voucher-receiving students reported feeling happy, doing well academically and participating in extra-curricular activities. Twenty-five percent of participants related their satisfaction with the TIE school to achieving well at school, 22% related it to having friends, 39% related it to getting along with other students, 18% related it to getting along well with the teachers. Dissatisfaction was related to similar features. Sixteen percent related it to getting along badly with classmates, 5% with teachers, and 5% expressed unhappiness related to a lack of achievement at school.

Interestingly, although Gaffney and Smith (2001) did not study outcomes of the Maori Enhanced TIE-Whakapiki Tauira scheme, they reported that none of the students receiving the Maori TIE attended private schools. Eighty-eight percent used the TIE funds for Maori boarding schools and 94% of the TIE receiving Maori students were attending secondary schools.

In summary, American studies have shown that students selected for the voucher program were from low-income families and performing in the bottom third academically, and in general these students demonstrated marked achievement gains after using vouchers to switch from public to private schools. This effect was especially strong for African-American students. New Zealand studies indicated that only the most talented low-income students were selected for the voucher program, and those youth generally reported being happy, doing well academically, and participating in activities after school. Achievement data were not analysed.

The Impact of Private Schools On Students

In the USA, nine out of nine studies indicated that outcomes for students attending private schools are positive, particularly in terms of racial integration and tolerance. Coleman et al. (1982) assert that although private schools educate a small proportion of minority students compared to public schools, the private schools distribute their minority students more evenly resulting in more racial integration. Generally speaking, there are more minorities concentrated in urban centers and whites/non-minorities in suburban areas. Public schools tend to be more racially segregated because they rely on students from the catchment area, which reflects the segregated housing patterns. Peterson, Campbell and West (2002) note that the size of the private school market in the family's community is a significant predictor as to whether the family will choose a private school. In other words, who chooses private schools is determined by where opportunities to enrol in private schools could be found.

Betts and Fairlie (2001) state that although Blacks, Hispanics, and immigrant families are less likely to attend private schools compared to whites, 70% of the variation can be accounted for by parental income and education. The extent to which the desire to be in a racially homogeneous school environment affects families' decisions on private school choice has not been conclusively determined.

Long and Toma (1988) and Buddin and Cordes (1998) found that Catholic families are more likely than other religious groups to choose private schools. Peterson, Campbell and West (2002) conducted telephone interviews with 2,368 voucher applicants for Children's Scholarship Fund (CSF) in June-August, 2000. In each family, one parent and one child (in grade 4 or above) were interviewed. The purpose of the interviews was to gauge the experience of those children who had switched from public to private schools. The researchers explain that simply being Catholic is not a significant predictor of attending a private school, but when evaluating Catholic affiliation and church attendance together, it is a significant predictor. In other words being a practicing Catholic is a significant indicator of whether the family will choose a private school.

Greene, Giammo and Mellow (1999) examined data from the Latino National Political Survey (LNPS)¹⁰. Controlling for a variety of background characteristics, the researchers concluded that a "moderate but significant" number of privately educated Latinos were more likely to be more tolerant than Latinos educated in public or foreign schools. They were more tolerant of the political activities of their least liked group, more likely to vote and more likely to join civic organizations. This finding was supported by Wolf et al. (2000) who conducted a study of college students in four Texan universities. The researchers found that going to private schools is associated with higher levels of tolerance, even after controlling for a host of background characteristics.

Campbell (2000) examined a large national data set of secondary school students that contained a limited number of tolerance items that focused on whether students would tolerate anti-religious activities. Campbell found that students from Catholic and other religious private schools were more likely than their public school counterparts to be tolerant of anti-religious activities and more likely to volunteer and develop civic skills such as the ability and willingness to write letters and engage in public speaking on public issues. Godwin et al. (2001) analyzed

¹⁰ A national sample of adult Latinos, where the subjects were asked to indicate whether they attended public, private, or foreign schools for each grade and they were asked tolerant questions developed by Sullivan.

survey responses of grade eight students enrolled in private and public schools in New York and Texas. They found that although the results for tolerance of students in private schools were positive, they were insignificant. The authors do note, however, that private education has a statistically significant and positive effect on political knowledge and support for democratic norms.

To conclude, American data indicates that parental income and education are the main determinants for who is likely to choose to send their children to private schools, as well as being a practicing Catholic. A number of studies found that going to private school is associated with increased tolerance of other religions and ideas, and with participation in the community and the democratic process.

The Impact of Home Schooling on Students

The research findings of 12 studies reviewed have generally indicated excellent outcomes for home-schooled students. In the USA, Rudner (1999) provides the most extensive research available to date. His analysis of the data collected in spring of 1998 by the Bob Jones University Press Testing and Evaluation Service,¹¹ involved 20,760 students from 11,930 families. Rudner concluded that the home-schooled students performed above average compared with their public- and private-schooled peers. Upon review of the academic achievement data, almost 25% of the home-school students are enrolled at one or more grades above their age-level peers in public and private schools. Home schooled children scored exceptionally high on student achievement tests scores. The median scores for every subject at every grade were typically in the 70th and 80th percentile. Home schooled students in grades 1 to 4 perform one grade level above their age-level public/private school peers on achievement tests. The achievement gaps between home and public/private school students start to widen in grade 5. Those children who are home schooled their entire lives have higher scholastic achievement test scores than students who have attended other educational programs. There is significant difference among home schoolers when classified by the amount of money spent on education, family income, parent education and television viewing. Regarding the demographics of the home-schooling families, parents generally have a higher level of education than parents of the general population (88%

¹¹ The home-school students had to take the Iowa Tests of Basic Skills (ITBS, K-8) or the Tests of Achievement and Proficiency (TAP, grades 9-12) and their parents were asked to complete a questionnaire.

compared to 50% of the general population continued their education beyond high school). A large percentage of home-schooled children have mothers who are certified teachers. The median annual income level is significantly higher, \$52 000 compared with \$36 000, than the average that all other families with children in the USA earn. Families of home-schooled children are more traditional, that is to say that 98% of home-schooled children have parents who are married couples, 77% have mothers who do not participate in the labour force, and 98% have fathers who work. Home schooling families have a mean of 3.2 children per family compared with the nationwide mean of 1.9 children per family. The vast majority (94%) of home schoolers are “non-Hispanic White”. The largest minority groups are American-Indian and Asian (2.4% and 1.2% respectively). Home schooling mothers were asked to identify their religion and the largest percentage (25%) identified “independent fundamental”, the next largest (24%) was Baptist.

The researchers warn that the main limitation of this study is that home-schooled students and their families are not a cross-section of the USA population and that the act of home schooling distinguishes this group in terms of their exceptionally strong commitment to education and children. They add it was not possible with the parameters of this study to evaluate whether this sample is truly representative of the entire population of home schoolers.

Findings from other studies are similar to Rudner’s. For example, regarding families’ characteristics, Stevens (2001), in a study of 70 home-schooling families in the USA, found that most parents are well educated, ecumenically minded and frustrated by the treatment their children are receiving in the regular schools. Cloud and Morse (2001) add that home-schooling families are committed to their children’s education and are willing to make sacrifices (i.e., time, money, and career) for their children’s education. Riesberg (1995) found that 50% of home-schooling families he interviewed have incomes between \$25 000 and \$55 000 and parents have attended or graduated from college. Ninety percent are Caucasian and 75% attend regular religious service. Home instruction lasts generally 4 years, from ages 5 to 9. Generally, the children have 3 to 4 hours of instruction a day and study many conventional subjects such as math, reading and science. Bielick et al. (2001) add that home-schooling families generally have more children, are more likely to contribute to political causes, correspond with elected officials, attend public meetings and join volunteer organizations.

Regarding academic achievement of home-schooled children, Calvery et al. (1992) compared achievement of Arkansas home-schooled and public-schooled students in grades 4, 7, and 10,

using the MAT-6. They found that home-schooled students scored higher than their peers in reading, math, language and total basic battery, science and social studies in grades 4 and 7. Compared to public school grade 10 students, home-schooled students scored higher in reading, math, total basic battery, science and social studies, but lower in language.

Ray (1997) examined the data of 5 402 home schoolers and concluded that students who were home schooled over time had exceptionally higher achievement scores.

Montgomery's (1989) study found that home-schooled children are not, as one may assume, socially deprived or isolated. A 1992 study by Shyers compared the behaviors and social development test scores of 70 home-schooled students with those of 70 public and private schooled students. The results showed no disparity in social development between the groups, although home-schooled children showed fewer behavioral problems. Montgomery (1989) also concluded in her study that home schooling may nurture leadership as well as the conventional schools. Mitchell (1994) supports this finding. In his study, Mitchell surveyed 212 home-schooled people at the evangelical Christian Oral Roberts University and found that many are dormitory chaplains, 88% are involved in one or more community outreach ministries, and many lead outreach groups. Gallaway and Sutton (1997) conducted a four-year study of 180 students (60 graduates each from public, private, and home schools) at Bob Jones University. They found that students who were home schooled ranked first in campus life leadership activities.

Ray (1998) conducted the most extensive research to date on home schooling in Canada. He used a survey questionnaire that asked for: descriptive information regarding parents and family (includes demographics, teacher certification status of parents); information regarding the students (demographics, years taught at home, academic achievement scores, curriculum used); information regarding the family's home education legal status (contact with public school officials and with attorneys), and an opportunity to volunteer to participate in a longitudinal study. The questionnaire was completed by 808 home-educating families, which represented 2 594 children. The findings indicate that the home-schooling parents generally have more formal education than the national average (fathers studied for an average of 14.0 years, mothers an average of 13.8 years, compared to the national 1991 averages of about 13 years for males, and a little less than 13 years for females). Family income is somewhat lower for home schoolers than for similar families in Canada (62% of the families are in the \$20,000 to \$49,999 annual income categories. The vast majority of these are husband-wife families. In 1990 dollars, the median

private household, husband-wife family income in Canada was \$48,091. The annual income of the home-educating families studied is, therefore, about 83% of that for all husband-wife families in Canada. Overall, fathers earn 92% of the families' income. Only 14% of the mothers work outside the home and of these women, the average amount of hours worked per week was 11.9). Similar to the findings in the USA, home-schooling families in Canada have on average more children than the average Canadian family (in 1991 the average family in this study was 5.5, while the national average was 3.2). While the home-schooling families are predominantly Christian in worldview, a wide variety of religious preferences is evident. The average age of the children in these home-educating families is just over nine years, and they have had little experience in public or private schools. The social activities of the children are quite varied, with the large majority experiencing significant activities with peers and adults outside of their families (Ray, 1998). On standard achievement tests, the home-schooled students performed at or above the 76th percentile on national norms in terms of their reading, listening, language, math, science, social studies, basic battery, and complete battery scores. Many factors were examined for their relationship to the student's academic performance; only a few are significant. Educational attainment of the fathers is a weak predictor of reading and language scores, and the longer a child has been home-educated, the better his/her language score (HSLDA Canada, 2003).

Generally, home-schooling families have higher levels of income and education, are more involved in the community and political causes, and have high levels of commitment to their children's education. All studies reviewed found that home-schooled children tend to score higher than their peers on various measures of academic achievement, sometimes exceptionally higher. No delays in social development were reported, in fact, home-schooled children tended to have fewer behavioural problems and were likely to end up in leadership activities.

Parents/Community

The Effects of Charter Schools on Parent and Community Involvement and Satisfaction, and Empowerment

With regard to the effect of charter schools on parental and community involvement and empowerment in relation to schooling, there appears to be positive parent satisfaction expressed

in North America but in the UK, New Zealand, and Australia the effects were neutral or negative.

For example, in charter schools in Alberta, Bosetti (2000) found that there is a sense of community and strong parental commitment to their children's school. da Costa and Peters (2003) also state that parent (and student) satisfaction data collected by the schools indicate a high level of satisfaction, which is also reflected in the long waiting lists to get into these schools. They add that it is fair to assume that charter schools will have a higher level of parental support and involvement than other schools (which contributes to student achievement). Similarly, Vanourek et al. (1997) conclude from their data of American charter schools that satisfaction levels of parents were high.

However, in Britain, Fitz et al. (1993) conducted a survey of a sample of GMSs, which revealed little difference in terms of parental involvement before and after a school opted out of the LEA. There were no apparent feelings of liberation, ownership or evidence of greater participation for parents. Fitz et al. add that the parents found little increase in the availability of choices. They state that while parents whose children were in GMSs expressed a high level of satisfaction with their children's schools, this same trend was expressed by parents in non-GMSs.

Deem, Brehony, and Heath (1995) conducted a longitudinal study of two contrasting LEAs and found that self-management in schools did not lead to increased community involvement. The authors found that although lay governors have been included in decision-making "they have not gained power over schooling in any real sense, let alone helped the communities they are suppose to be representing" (p. 62). The authors explain that this is partly due to the lack of expert knowledge and informed perspectives. They insist that merely putting people of certain groups on the board of trustees does not translate into empowering them.

In New Zealand there is similar evidence that community involvement has not increased since the implementation of educational reforms. Wylie (1994) administered a series of surveys to principals, trustees and teachers in a national sample of primary and intermediate schools, and found that the self-management of schools has not led to more participation of low-income groups. She suggests that something more has to be done to bring them into the schools. She points out that parental influence on policy formation is limited and the boards of trustees are not representative of the population.

In Australia, there has been a wide range of practices affecting the level of participation of community members and parents in the education system. In the state of Victoria, the new state government dissolved the representative committees, as they were perceived as “interfering,” especially when they perpetuated “old-style union or welfare ideologies” (Whitty, Power, & Halpin, 1998, p. 105). In New South Wales, very few moves have been made to establish school councils of any kind. Before the introduction of the new reforms, school councils in Queensland were key places where curriculum policy was deliberated, but the power of these councils was undermined with reforms that brought in centralized state-wide teacher evaluation and student testing and the prescriptive policy directives (Whitty, Power, & Halpin, 1998).

When examining school choice and charter schools, it is important to consider whether students from families of a variety of backgrounds have equal access to charter schools. The studies cited below indicate that certain groups may be more “disadvantaged” than others regarding enrolling and maintaining their placement in charter schools.

In Britain, Raey (1996) interviewed mothers of school children and found that there is a “complex web of inequalities which infuse processes of choice-making” (p. 593). She highlights class differences between mothers with respect to parental involvement in schools, noting that confident, sometimes “pushy,” middle class parents often get their needs and wants heard and acted upon, while working class parents may never express their dissatisfaction to the school board (p. 581).

Bosetti (2000) indicates there are some differences between the groups in society who are more likely to be successful in bringing their hopes for a charter school to fruition. Establishing a charter school in Alberta is a difficult process requiring persistence on the part of parents and communities as they encounter challenging barriers. For example, they receive little or no technical or financial support, weak guidelines and burdensome provincial regulation. A large time commitment is required to voluntarily organize, and they must draw on their social and cultural capital (Bosetti, 2000). This results in certain groups being approved to establish charter schools while others with equally valid proposals do not reach the final stages of the process.

Wells, Holme, Lopez and Cooper (2000) examined the data of 14 of the charter schools in a UCLA study,¹² and contend that charter schools in the USA are even more segregated in terms

¹² The UCLA Charter School Study was a two and a half year study funded by the Ford and Annie E. Casey Foundations with additional support from the Spencer Foundation for individual researchers involved in the study. It examined 17 charter schools in 10 California school districts. The focus of the study was to investigate how charter

of race, class, socioeconomic and other cultural dimensions than are already segregated public schools. They explain that charter schools used such mechanisms as “targeted publicity and recruiting, admissions criteria and parent and student contracts that let certain people in and kept others out” (p. 156). For example, some charter schools use parent participation “contracts” which require parents to commit to volunteer for a predetermined numbers of hours. If the parents do not comply with the conditions of their contract, their children can be asked to leave the school. The authors add that even if the families are not asked to leave for failing to meet their required volunteer hours, the contracts scare parents into leaving or not enrolling their children the next school year. One superintendent in the study pointed out that for less educated, working class people who have lower socio-economic status, contracts are not a “cultural fit” for them, they may not understand the nature and seriousness of contracts or they may be intimidated by them. Additionally these families often have less time and fewer means to fulfill the contract. Another example of increased segregation lies in how charter school communities are built. Charter school communities have more freedom in allowing shared values and beliefs to make decisions about which families fit into the school community and thus who should attend the school. Compared to other public schools, charter school operators have more power to act on those preferences.

As in the USA, contracts between schools and parents are also becoming more common in England and Wales. In agreement with Wells et al. (2000), MacLeod (1996: 2) charges that the use of contracts ensures schools can consolidate their market position through “cream-skimming.” Parents who don’t want to sign the contracts are seen as “difficult” and probably do not have the “right dispositions toward school policies” such as discipline and homework. When contract signing is a required enrolment procedure, it ensures that schools can make demands from parents and exclude parents who are not seen as assets. Grutzik et al. (1995) concur, stating that parent contracts place heavy burdens on families who, for example, have English as a second language, have transportation problems, or work long hours.

In their study of California charter schools, Becker et al. (1995:18) found that charter schools are now using selection criteria which are not based on the prospective student’s academic ability

school reform interacts with different local communities. The study used semi-structured interviews with school district officials, various members of the charter school communities and educators from nearby public schools. Document analysis was also done.

or their parent's ability to pay, rather the criteria is based on having "supportive and involved parents."

Wells et al. (2000) state that although charter schools were built on the notion of diversity, this became more of a "bounded diversity" in which the community could be diverse in a few dimensions (e.g., ethnicity), but only if the students and their families share similar values and beliefs (e.g., regarding parental involvement, education) and appreciate the distinctive identity of the charter school. This is a difficult task and results in schools that are not very diverse.

Scott and Holme (2002) assert that in certain social contexts, "start-up" charter schools (those that were not pre-existing as public schools before becoming charter schools) will face more problems than pre-existing counterparts and may be unable to generate the required resources to be successful. Looking at the data from six charter schools in the UCLA charter school study, Scott and Holme conclude that schools in high-status communities generally have closer connections to community members who have considerable resources that they are willing to commit to the school. In contrast, those located in economically impoverished areas rarely have ties to well-resourced individuals or corporations. These schools must forge ties with individuals or businesses outside of the local community who may have drastically different visions or goals for the school.

Bosetti (2000) charges that the communities and social networks within which the charter schools operate are in a sense closed so that people who do not fit the mould (i.e., share the same values) are covertly excluded. Fuller, Elmore, and Orfield (1996) suggest that charter schools are established based on the interests of specific groups, who cater to their own interests without regard for the greater good. They undermine the responsibility of public service and divert attention and resources for education away from improving public education for all. According to Giroux (1992), charter schools make a priority of the private benefit determined by the parents, rather than balancing and accommodating both the individual and public good.

In both the U.S. and Alberta, most of the charter proposals have been for "niche schools" serving particular populations. In this sense, charter schools end up serving special interests, rather than creating programs that develop alternatives offered to most students. They divert money and attention from improving all schools to enhancing a few (ATA, 2003). However, Brown (1999) responds to that sort of argument by stating that in the community of choice programs, parents are working together to benefit other children not just their own, which is the

basis of citizenship building. Rittman (2001) adds, “parents responding to their child with love and commitment does not imply elitism and disregard for others” (p. 23).

In conclusion, surveys of North American charter school parents indicate high levels of parental satisfaction and feelings of a sense of community and strong parental commitment and involvement in the schools. In Britain and New Zealand, however, the change to self-management of schools has not resulted in increased parental influence or real participation and empowerment of parents, especially low-income parents. In Australia, there have been few moves to increase parental participation and in fact, reforms have taken place that actively lessen the influence of parents on school direction and policies.

In all countries, studies show that charter schools are not equally accessible to all groups. In Canada, an excessive amount of time and personal commitment is required to get a charter school off the ground, meaning that only groups with the time and finances to spare can bring a charter school to fruition. In the USA and the UK, it is common for charter schools to have contracts requiring a certain number of volunteer hours from each parent, otherwise their child may be asked to leave the school. This unfairly burdens lower-income families who generally have less time and means to fulfill those commitments, and are therefore not seen as desirable participants in the charter school. As a result, charter schools are not very diverse and tend to cater to the interests of specific groups, and not the greater good of the community.

Parent and Community Satisfaction with Voucher Programs and Private Schools

Generally, research shows that parent and community satisfaction with voucher programs is higher than that of parents who send their children to public schools.

As an example, in six American studies, parents indicated high levels of satisfaction with voucher programs and the private schools their children were able to attend as a result of having vouchers. Using surveys as the primary method, Witte (1999) looked at the Milwaukee program and found that “satisfaction of choice parents with private schools was just as dramatic as dissatisfaction was with prior public schools” (p. 237). Metcalf (1999) studied the Cleveland program and found that parents of voucher students are generally more satisfied with their child’s voucher school, specifically with the teachers, academic standards, discipline and social activities. Greene, Howell and Peterson (1998, 1999) also looked at data collected from the Cleveland program and found that 50% of the parents with children using vouchers in private

schools reported being satisfied specifically with the academic program, safety, discipline, and the teaching of moral values. The researchers point out that in the public schools, only 30% of parents express satisfaction with these things. Wolf, Howell, and Peterson (2000) looked at survey results from Washington, DC and found that 46% of private school parents gave an “A” to their child’s school, whereas only 15% of parents gave public schools an “A” rating. In Dayton, Howell and Peterson (2000) found that 47% of the parents of private school students gave their schools an “A,” compared to 25% of a cross-section of public school parents, and 8% of public school parents who applied for vouchers but did not receive them.

Peterson, Myers and Howell (1998) noted that in New York, a “significant” percentage of parents were “very satisfied” with the private schools’ safety, parental involvement, teaching, class size, respect for teachers, school facilities, teacher communication, discipline, clarity of school goals, staff teamwork, teaching, academic quality, sports programs and what is taught in the schools.

Public opinion polls in the USA indicate mixed results although it appears that in general there is a decline of support for voucher programs. For example, the 2001 Phi Delta Kappa/Gallup Poll indicated that 62% of respondents were opposed to allowing parents to choose private schools for their children at public expense, compared to 56% the previous year. Thirty five percent were in favour in 2001 compared with 39% in 2000. In 2001, public and parental support for making publicly supported private schools as accountable as public schools was the highest ever, 82% and 83% respectively (Rose & Gallup, 2001).

The Hart Research Associates surveyed a random sample of over 800 respondents in 1998, and found more opposition than support for the notion of “allowing students and parents to choose to attend a private school at the public’s expense” (38% in favour and 54% opposed). However, there was overwhelming support (80%) for voucher school accountability (e.g., requiring schools to meet basic curriculum and teacher-qualification standards). Additionally, respondents felt voucher schools should also avoid racial and religious discrimination, meet health and safety conditions, employ only certified teachers, disclose their budgets, use the same tests as public schools, and comply with the Americans with Disabilities Act (Peter Hart Research Associates Poll, 1998).

A telephone poll of 1,211 adults conducted in 2001 by Utica-based Zogby International found “paper-thin” support for vouchers (48% favoured publicly-funded vouchers to be used in

private schools while 48% opposed). Forty percent said they would not support vouchers if it meant a loss of tax dollars to public schools (National School Boards Association News Release, 2001). Twelve percent of respondents (only 5% of the African-American adults) felt that the voucher was the best way to improve education. The rest of the respondents preferred that tax dollars be spent on reducing class sizes and strengthening teacher quality.

The Public Policy Forum survey of taxpayers in Ohio and Wisconsin shows increasing support for expanding voucher programs in these two states, but respondents believe private schools should be held accountable to the public (Schaiberg, 1998).

Finally, Public Agenda's Poll (2000) did a comprehensive national survey of attitudes on public school alternatives and cautions that the vast majority of citizens know very little about school choice alternatives. It is with this caution in mind that the above mentioned U.S. opinion polls should be considered.

In New Zealand, according to Gaffney and Smith's (2001) study, 90% of parents felt their children were making good progress in the voucher schools. They perceived their children had shown improved self-esteem, maturity, motivation, and greater participation in extra-curricular activities. However, over a third of the parents expressed some problems associated with the schemes. Ten percent expressed a problem of financial hardships. For example, some voucher-receiving children could not participate in extra-curricular activities because of a lack of income. Ten percent reported an increase in workload for the students. Five percent noted negative attitudes of other students and teachers toward the voucher-receiving student, although families reported no significant difference on how the students were treated by other students at their previous school and their TIE school. There was also some "discomfort" about the situation of siblings, as only one child per family could participate in the TIE scheme. This was felt to be unfair and also contributed to the complications of arranging family travel arrangements. This is a larger issue for children of elementary age as they are more dependent and require more time and effort of the families when making travel arrangements. In comparison to the schools the TIE students attended previously, most families rated the private schools more positively on types of activities and resources available. The main feature families reported as worse was the need to travel long distances to the private school when compared to their previous public school.

Wylie (1997) found that the majority of parents were happy with their choice of schools (85% of parents surveyed said their children were in the first choice of school while 15% said their choices were limited). Interestingly, the majority of the parents who did not get their first choice of school were Maori. Limitations to school choice were related to transportation problems, enrolment, and cost (Wylie, 1997).

In summary, in the USA, although parents of voucher school students indicated high levels of satisfaction with the teachers, academic standards, discipline and social activities of the new schools, public support for the voucher programs seems to be declining. Two surveys clearly found the American public not supportive of parents choosing private schools for their children at the public's expense, one study found equal number in support of and opposed to voucher programs, and one study found support for voucher programs in two states. However, these results must be interpreted cautiously in light of another study that found the American public knows very little about school choice alternatives. In New Zealand, the majority of voucher school parents surveyed were highly satisfied with their children's progress, and perceived improvement in many social realms. However, about a third of parents were experiencing hardships as a result of the voucher program, including increased financial burdens due to charges for extra-curricular activities, and additional travel burdens to get their child to the new school, complicated by the fact that only one child per family could receive a voucher. No public opinion polls regarding support for voucher programs were reported.

Impact of Home Schooling on Parents and Community

Public opinion about home schooling varies. For example, the Phi Delta Kappa/Gallup Poll (Rose and Gallup, 2001) shows a 54% disapproval rating and a 41% approval rating for home schooling in the U.S. This shows a marked difference from the ratings of the 1985 Phi Delta Kappa/Gallup Poll when the disapproval rating was 73% and the approval was 16%. The 2001 the Phi Delta Kappa/Gallup Poll added two new questions regarding the effect of home schooling on raising academic standards and citizenship. The responses indicate a deep division, with 43% of respondents believing home schooling contributes to raising academic standards and 50% believing it does not. Forty-six percent of respondents believed it aids good citizenship and 49% believed it does not.

Accountability

Studies have indicated that school choice has, for the most part, provided more accountability measures. This is particularly evident for the charter schools in North America.

In theory, charter schools are held accountable for student outcomes and success in ways regular schools are not, because if they do not achieve results they can be closed down (Finn, Manno, Bierlein & Vanourek, 1997; Hassel, 1996; Koldrie, 1992; Manno, 1998; Manno, Finn, Bierlein & Vanourek, 2000; Millot, 1996). However, Wells (2002:11), looked at the USA context and pointed out that “there is no strong or consistent evidence that charter schools are being held more accountable for academic outcomes than regular schools”. Studies show that there appear to be no consequences for charter schools demonstrating poor academic performance (e.g., Henig, Holyoke, Lacerino-Paquet & Mosser, 2001; Massachusetts State Auditor, 2001; Miron & Nelson, 2000; Texas Centre for Educational Research, 2001; Weillard & Oplinger, 2000). Moreover, charter schools are more likely to be held fiscally accountable rather than academically accountable. Wells, Vasudeva, Holme, and Cooper (2002) provide an example from their study in California. They explain that the lack of accountability on the part of charter schools is due to the fact the Californian legislation does not explain what role the school districts play in accountability. The authors attribute this problem to several points. First, there was no consistent state assessment system in place until five years after the charter school legislation went into effect; second, most charter schools had visions of what their students should learn and these were not measurable by a single standardized test; third, many of the defining purposes of charter schools were non-academic in nature (e.g., safety and discipline) and these forms of outcomes do not lend themselves to traditional forms of accountability; and fourth, charter schools had multiple constituencies to whom they felt they were accountable and these constituencies often did not include the district officials.

In the USA, Gardner (1999) declares that accountability is difficult to achieve in practice because “many schools do not have the funds or resources to conduct comprehensive student assessments and many states do not specify what standardized assessment instruments are to be used” (p. 11). Similarly, in Alberta, charter schools must, in addition to administering provincial exams, develop their own measures showing the various dimensions of students’ development in relation to their unique learning goals as defined by their charters (Alberta Charter School

Handook, 2002). These tests, along with parent and student satisfaction surveys, provide accountability measures for families, communities, and government.

Regarding standardized testing measures, England and Wales publishes “League tables”¹³ which include the raw exam results of schools, but these do not take into account the different cultural and social backgrounds of the children involved (McPherson, 1992). This has led to a distortion due to greater selectivity by schools when enrolling new children, and to a preoccupation with exam results (teaching to the test).

Fiske and Ladd (2000) claim that the New Zealand model provides for accountability through periodic inspections of schools by an independent agency. The schools are evaluated relative to their educational goals. These reviews are made available to the school, the chartering agency, and the public. Fiske and Ladd warn that for this kind of evaluation to be effective, highly qualified and trained professionals must staff the independent agency and their review must focus not only on processes but on educational outcomes as well.

The New Zealand government also uses bulk funding as a tool to increase accountability. While other countries have used funding as a means of increasing accountability through the notion of families voting with their feet and schools receiving money depending on school numbers, New Zealand uses bulk funding which brings with it a number of complicated outcomes. One such outcome is the tendency to employ younger, cheaper staff (Leithwood et al. 1999). Also, as schools are given bulk funding depending on their number of students, and because schools can spend the money as they see fit, this has resulted in lower teachers’ salaries and a consequent higher turn-over of teaching staff.

If everyone had faith in the free-market, private schools would not have to be held accountable by government since in the educational marketplace private schools are “automatically held accountable from below – by parents who leave bad schools, seek out better ones, and thus provide schools with the right kinds of incentives to keep them performing effectively” (Moe, 2002:198). However, an American survey of national public sentiment indicates the favouring of imposing government regulations on private schools with regards to curriculum, academic performance and admission policies because of the fear that private schools will offer poor quality education, indoctrinate children or commit fraud (Moe, 2001).

¹³ To view examples of League Tables go to:
http://news.bbc.co.uk/1/shared/bsp/hi/education/02/league_tables/england_primary/html/

Accountability policies in private schools should involve rules and requirements regarding teacher qualifications, curriculum and standards, annual audits, regular testing of students and making information about the school public. Although Moe (2002) warns that since private schools' autonomy is pivotal to their strength, all accountability regulations must be kept "simple and basic" and light (p.199).

In the UK, affluent private schools provide a good education but at the bottom end of the market some of the schools, in terms of education alone, are "positively dreadful and it would be more logical for parents to pay fees to keep children out of them" (Griggs, 1985, p.2). The head of the Office for the Standards in Education (OFSTED) echoes this sentiment by stating, "while independent sector contains some of the best schools, it also includes a number that are among the worst in the country (BBC, August 28, 2003). In fact, according to the head of OFSTED, in 2003 one in seven private schools was poorly run, compared to just one state primary in 17 and one comprehensive in 25. OFSTED inspects all schools that are not members of the Independent Schools Councils (ISC), some 1,000 private schools. OFSTED does not inspect the private schools that are members of the ISC. ISC schools enroll around 80% of the privately educated pupils in the country. ISC has in recent years already taken steps to be more accountable to parents by providing more information about standards in their member schools. With the new 2002 Education Act, tougher standards are being enforced on the OFSTED-inspected schools¹⁴ to maintain similar standards set in the ISC schools.

Accountability measures in home schooling vary from community to community. For example, in Canada, accountability measures vary in strength but generally home-schooled students must be registered with the province, follow a program of studies approved by the Ministry of Education, and be supervised by a nearby school authority (public, separate, or private). Secondary school students earn credits toward a high school diploma through home schooling.

In the USA, the laws governing home schooling vary widely from those states that require no notice (i.e., no state requirement for parents to initiate any contact with the state as in the case of Alaska, Idaho, Illinois, Indiana, Michigan, Missouri, New Jersey, Oklahoma, and Texas) to states

¹⁴ Before the 2002 School Act independent schools lacked accountability. They could disobey health and safety standards, provide poor quality education, be opened without first being inspected and even before applying for a provisional registration. After they were registered they could be bought and sold and change their name without having to re-register (BBC, August 28, 2003).

with high regulation, (i.e., states requiring parents to send notification of achievement test scores and/or professional evaluation, plus other requirements, such as curriculum approval by the state, teacher qualification of parents, or home visits by state officials, as in the case of Maine, Massachusetts, Minnesota, North Dakota, New York, Pennsylvania, Rhode Island, Utah, Vermont, Washington, and West Virginia) (HSLDA website, 2003). All other states fit into the categories having “minimal” (i.e., states requiring parental notification only) or “moderate” regulations (i.e., states requiring parents to send notification, test scores, or professional evaluation of student progress). In regards to accountability and public opinion, the 1999 Phi Delta Kappa/Gallup Poll indicated that 92% of respondents believed home schoolers should be required to take the same state and national tests that public schools take. This is contrary to the stance many pro-home-schooling lobbyists take. They believe that home schoolers should be exempt from such tests (Golden, 2000).

Regarding accountability measures in England and Wales and New Zealand, state authorities take a hands-off approach to home schooling. There are no laws requiring parents to register their children with the state nor to have their children’s education supervised by the state in any of these jurisdictions.

However, in Australia parents who home school are held accountable in a number of ways, from requiring home-schooled students to register with and be tested by the state, to requiring educators to be registered teachers. In Western Australia, home educators lobbied for amendments to the School Education Bill demanding conditions of accountability that are not discriminatory, but this amendment was rejected. The lobbyists are still in the process of taking the proceedings to court.

In conclusion, there is debate about whether school choice has increased accountability in a number of areas. In Canada and the U.S., there is no evidence that charter schools are held more accountable for academic outcomes than public schools, however they may be held more fiscally accountable. In Alberta, charter schools must develop their own measures in relation to their unique learning goals and provide results to parents, communities and government. In the US this is not happening as much because of the lack of funding for developing such measures and the lack of direction from state governments about what is required.

The New Zealand government increases accountability by having an independent agency do periodic inspections of schools. The government also provides bulk funding to schools to be used at the schools' discretion, and one result is the under-valuing of the teaching staff.

American surveys show that the public favours imposing government regulations on public schools to keep them accountable and prevent decreasing quality of education, fraud, or indoctrination of students.

In the UK, the independent sector contains some of the best, and some of the worst schools. The OFSTED inspects all other schools except for the independent ones. In recent years, independent schools are being required to become more accountable by providing more information to the public.

Regarding home schooling, accountability varies greatly. In Canada, home-schooled students must be registered with the province and follow curriculum provided by the Ministry of Education and be supervised by a local school board. Some American states require no notice or information on home-schooled students, as is the case in the UK, while some states monitor everything from student achievement scores to the qualifications of the home-schooling parent, as in Australia.

In conclusion the approaches to accountability may vary widely from jurisdiction to jurisdiction and across the different types of educational choices available. The link between choice and accountability is not at all clear and any patterns of the availability of choice forcing accountability have not yet been documented in the research literature.

Conclusions

In this review, we examined the literature dealing with school choice from a number of perspectives. The nature of school choice itself was considered along with the various definitions of the term and how it is available or applied in different countries. The term, we found, is invariably applied to choice in a system of education outside the government-supported and governed public system. It is generally taken to refer to the availability of private or independent schools, charter schools, school voucher systems (in whatever form), or home schooling. Those writing in the area of school choice ignore the massive growth in choice within the public school systems, both in terms of program choice and choice of schools themselves, either through open boundaries within school jurisdictions or by means of enrolment outside the jurisdiction of

residence. While attention is paid to the number of parents and students exercising choice outside the public school system, and to the nature of this choice, notably less attention is given to reporting on the nature of choice within the public system and the numbers availing of these choices. In any comprehensive examination of choice in education, choice both within and outside the public school systems must be considered.

The literature generally supports the view that parents and students who were able to exercise school choice appeared to be very satisfied with their schooling. However, not surprisingly, there are mixed results concerning student achievement. Some studies indicated no notable gains for students in choice schools, and in those studies where gains were noted, it is impossible to establish whether the gains were due to the exercise of choice, selection of specific programs, or other reasons. In the literature, researchers warn that variables such as student selection, parent involvement, or home environment may also play a notable part in determining a student's academic performance. These cautions are emphasized in the case of many private schools where the rigorous selection criteria could increase the likelihood of stronger academic attainment.

Belfield & Levin (2002) issue a number of other cautions regarding the interpretation of the school choice literature. They point out the extreme difficulties associated with correlating the choice measures with educational outcomes unless consideration is given to such methodological issues as "simultaneity" and "omitted-variable bias." They provide an example of simultaneity as the need to hold "demand" constant when examining the option of choice between a public and a private school. "When public schooling is of low quality, the demand for private schooling rises, creating a negative relationship between public school quality and private schooling enrolment" (p. 282). Omitted-variable bias is just that, a variable or a number of variables critical to a proper comparison are omitted from the examination. The examples that the authors provide deal with "resource-omission bias" (e.g., when higher demand for private schools reduces the taxpayer's support for public schools), or "ability-omission bias," (e.g., when private schools "cream" off the most academically-able students resulting in lower-average ability and lower-average test results for the students remaining in the public school). A third example relates to "socio-economic omission bias," (e.g., the demand for private schooling may be influenced by a community's average income and educational levels).

Shaddish & Haddock (1994) warn about the dangers associated with accurately interpreting ideologically-driven research. These studies are particularly prone to problems relating to sample

size and the absence of randomized trials. There may also be a tendency to only report statistically significant results and omit reference to areas where no differences were found. This form of selectivity is referred to by Belfield & Levin (2002) as “optimistic eclecticism” (p. 294).

Given the range of studies examined in this review, the admonition from OECD (1994) that it is unlikely that we will be able to either prove or disprove any relationship between school choice and improved school effectiveness seems relevant.

There is a growing demand for school choice in all of the countries looked at in this review. However, choice in schooling is not available to all parents to the same degree. It is evident that intervention strategies are required to manage school choice in order to reduce barriers to *real* choice faced by certain groups (e.g., difficulties related to getting information on the programs, transportation, fees and “hidden costs,” admission policies, selection criteria).

It is also obvious that programs of choice are not necessarily transferable from one setting to another. A number of micro-variables, such as distance of residences from schools, and family and community characteristics, affect the success of individual students. Macro factors such as the wider political, economic, and social climate of the community may also affect the outcomes of school choice programs.

Finally, a whole range of questions relating to appropriate accountability structures also emerged in the literature dealing with choice. At the most general level, the question arose as to how the public at large can be educated and informed about school choice programs in general, so that citizens can make informed decisions and have informed opinions? The importance of examining what accountability measures are in place for each of the programs was also discussed. Among the questions that need to be addressed are the following: what measures should be put into place and why?¹⁵ How will student achievement be measured? How is the public informed of the program’s overall achievement? How will difficulties around making direct comparisons between programs/schools’ accountability measures be addressed?

An appropriate accountability framework should describe clearly the roles of parents in the school’s operation and governance. Similarly, the nature of the involvement of any funding agency should be clearly stated, particularly in so far as that agency might influence either the

¹⁵ As noted in Part I, these basic questions about accountability need to be asked: Who or what is to be held accountable? What level of accountability is to be provided (under what procedures, according to whose criteria?) Who is expected to provide the account? To whom is the account owed? What is to be accounted for? What are the consequences for providing an account?

program contents or the mode of delivery. Questions also need to be raised in regards to providing information to parents regarding the overall operation of the program or school. Similarly, the accountability framework should describe how the school will hold professional and support staff accountable for the delivery of the program. It should describe how the staff will be remunerated and assessed, and outline the areas of responsibility for different staff members.

The evolution of the construct of choice in education described in this review attests to the complexity of the issues surrounding the topic. A variety of choices are emerging in education in response to particular value changes and demands. There is an increasing demand that the market be considered as a viable means of delivering educational services and choices. There are underlying assumptions that providing choice can help improve the quality of service that schools provide; that choice in education will lead to stronger economies; that more choice in education improves the overall education system. There is a pervasive understanding in most of the literature that the only real choice in education is one that facilitates the movement of students from the “public” to some alternative form of schooling. The research, however, does not appear to substantiate any of these claims, and the limited understanding of choice ignores the vast majority of the population which still chooses to send children to the public school system, a system in which an increasing amount of choice, at various levels, is to be found.

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