Section One:

Can the Market Save Our Schools?

Publicly Funded Education in Ontario: Breaking the Deadlock

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Introduction and Overview

Ensuring that young people get the necessary knowledge and skills for an independent, fulfilling existence is one of life's most important tasks. Educating one's own children is a hallmark of a good parent. And trying to provide an education for children whose families are unable or unwilling to take on that task has inspired systems of state-supported education in every liberal democracy.

Ontarians have for decades made enormous commitments to publicly-funded education. We vie with anyone, not only for verbal support, but also in resources invested.[1] Yet our achievements, though perhaps impressive in the past, are not commensurate with our commitments.

The Problem: Underperformance and Overcentralization

Student achievement in Ontario is, on average, unimpressive compared to objective standards and achievement elsewhere. More strikingly, the

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wide dispersion of achievement scores and the high proportion of students in programs related to academic incapacity suggest that the key goal of publicly funded education—ensuring that all young people start adult life with at least a basic level of competence—is not being achieved.

There are many plausible suspects behind this failure. My list includes incomplete curriculum, inadequate assessment, and a culture among many education professionals that ranks academic achievement behind the inculcation of politically correct attitudes and self-esteem. These flaws matter. Similar problems afflict other education systems, however, and the consequences are not always as serious. In Ontario, something seems to make us more vulnerable to challenges that jurisdictions where achievement is higher and less dispersed—such as Alberta, Quebec, and many continental European countries—appear to confront more successfully.

In my view, Ontario's inability to overcome these handicaps stems largely from dysfunctional governance. Publicly funded education in Ontario has become more centralized over the years, and bottom-up pressure to improve is weak because parents, teachers, principals, and school communities have little power to raise achievement at their schools.

This lack of local power creates a vicious circle, moreover, producing the deadlock referred to in my title. Because opportunities to make a difference at their schools are few and feeble, many parents, teachers, principals, and community members who would like to see better results turn off, and devote their time and energy to more promising causes. Their disengagement reinforces central control, and further exposes schools to the influences of weak curriculum, poor assessment, and the indifference toward academic objectives on the part of many in positions of influence in the education system.

The Solution: Bottom-Up Pressure for Improvement

If this diagnosis of the problem is correct, the cure lies in measures that will strengthen bottom-up pressure to improve. We need to give individual schools more autonomy. And we need to ensure that competitive pressures created by expanded parental choice will give more autonomous schools incentives to use that autonomy to improve student achievement.

School councils could provide a platform for school-based governance in the future, and charter schools are a model Ontario could use-

fully follow to create more school autonomy. When it comes to incentives, new funding arrangements that empower parents to seek out the best schools for their children would be a powerful force for bottom-up improvement, with partial funding for independent schools being another cost-effective option.

Lack of interest on the part of the provincial government and opposition from many vested interests in the public-education industry may make early progress along these lines unlikely. In that case, privately financed vouchers would be invaluable for the students who used them, and a useful prod to improvement for the system as a whole.

Student Achievement in Ontario

To many people, the statement that Ontario's publicly funded elementary and secondary schools underperform would appear so uncontroversial as to need little backing up. But partly because the system resisted objective assessment for decades, there has been a lot of scope for contrary views, so it is worth spending a moment looking at the evidence.

Poor Average Student Achievement

Although no one has systematically surveyed the situation, testimony from post-secondary instructors suggests that the rise in post-secondary enrolment rates is uncovering major failings in the elementary and secondary school systems. Complaints about the increasingly unprepared state of incoming students are widespread. First-year remediation is already a major industry in community colleges, and may soon be one in universities as well (Robson et al. 1999, 7-9).

Complaints from post-secondary instructors are reinforced by evidence of Ontario's weak performance relative to other jurisdictions. International tests have shown Ontario in an unfavourable light for years.[2]

The 1995 Third International Mathematics and Science Study (TIMSS), the most ambitious comparison yet, confirmed this pattern. Among the 17 countries providing comparable data for grade 4 students, Canada placed eighth in math and sixth in science. Adding to the rankings the five provinces—British Columbia, Alberta, Ontario, New Brunswick, and Newfoundland—that oversampled to allow independent comparison put Ontario eleventh in science, trailing every other province except New Brunswick, and thirteenth in math, last among

the provinces.[3] Treating the 5 provinces independently again, TIMSS produced comparable results for grade 8 students for 31 jurisdictions: Ontario scored 18th in math, behind every province but New Brunswick, and 22nd in science, last among the provinces (and behind the United States).

Particularly worrisome is that Ontario (like the United States) stood out for relatively meagre improvement from grade to grade: students in higher grades were further behind their peers abroad. Between grades 7 and 8, Ontario students improved their math performance by less than most other jurisdictions, and their improvement in science was second lowest (author's calculations from data in Robitaille, Taylor and Orpwood 1997).[4] Defenders of Ontario education often claim that these tests fail to control for differences in student coverage and curriculum. A review of the TIMSS results for Ontario's Education Quality and Accountability Office (EQAO), however, found that the top achieving countries tested a higher proportion of their students than Ontario did, and that rankings based only on responses on topics covered in the Ontario curriculum were the same as the overall rankings (Orpwood 1998, 5).

Inter-provincial tests confirm the message that, within Canada, Ontario is a laggard. The 1997 School Achievement Indicators Program (SAIP) tests in mathematics show Ontario's anglophone 13-year-olds and 16-year-olds to be middle-of-the-pack at best, and Ontario's francophones to be consistently among the bottom performers.[5] The difference between the scores from the two age groups, moreover, shows unimpressive relative improvement during the intervening years, with the francophone students' relative decline in the national rankings standing out.

In the 1996 SAIP science tests, Ontario's results were uniformly poor. Anglophone students were fifth from the bottom among 17 identified jurisdictions at age 13 and again at age 16.[6] Francophones were second last at both ages.

The 1994 SAIP results in reading also told a grim story. Judging from the proportion of students achieving level 3 or better on the SAIP's five-point scale, Ontario's anglophone 13-year-olds did reasonably well, though falling short of their counterparts in Alberta and Quebec. But the 16-year-olds slipped to the lower half of the pack, suggesting relatively little improvement in early high school. The same pattern was evident in writing: anglophone 13-year-olds did quite well (unlike their francophone counterparts) but 16-year-olds were below the middle of

the pack, with a ranking by the difference in performance at the two ages putting Ontario dead last.

The results from the 1998 SAIP for reading and writing present a brighter picture in some respects. Ontario's anglophone 13-year-olds and 16-year olds both scored comparatively well in writing. In reading, the 16-year-old anglophones also did relatively well. Unfortunately, the good news did not extend to the francophone students, who ranked below the middle of the pack in reading and close to the bottom in writing at both ages (EQAO 1999, 72-73).

To help judge whether the 1998 SAIP anglophone results indicate a turnaround in Ontario's performance, one would ideally want consistent achievement tests over time. Unfortunately, since the abandonment of high-school exit exams over three decades ago, there has been almost no controlled testing in the province, so little information of this type exists. In the 1994-95 International Adult Literacy Survey (IALS), Ontarians aged 26 to 65 handily outperformed the rest of the country, surpassing even the strong-performing western provinces in two of the three categories tested, but Ontarians aged 16 to 25 underperformed the national average in all categories, scoring well below the west and also below Quebec (SC/CMEC 1999, 89). Although many factors other than school quality affect those results, they are consistent with relative deterioration.

Sporadic math tests in the early 1990s showed discouraging results (MET 1992a; 1992b; 1992c), and subsequent rounds inspired charges that administrators were lowering the bar to improve the story (Lewington and Orpwood 1993, 151-52). A 1994 test of grade 9 reading and writing made special accommodations for, or exempted, many weaker students, yet found that over half scored below "competent" on a six-point scale (see Daly 1994; Lewington 1994).

A new provincial testing agency, the EQAO, began testing grade 3 students in 1997 and is gradually extending its assessments to other grade levels. The results of its program to date are hard to interpret, for several reasons. The tests de-emphasize elements that are easy to score objectively, such as short-answer or multiple choice, in favour of constructed responses that are harder to grade consistently.[7] High proportions of students—around one-third of those in the grade 3 tests—receive special accommodations such as extra time or help in reading the questions, moreover, while several incidents have pointed to inadequate controls over writing conditions. Most important, the content of the tests is changing in response to past difficulties and the introduction of

Table 1 **Students At or Above the Provincial Standard in EQAO Tests (percent)**[8]

		1997	1998	1999	2000
Grade 3	Reading	50	46	44	49
	Writing	39	49	51	52
	Math	33	43	56	57
Grade 6	Reading	n.a.	n.a.	48	50
	Writing	n.a.	n.a.	48	48
	Math	n.a.	21	46	51
Grade 9	Math	n.a.	25	n.a.	n.a.
Grade 10	Literacy	n.a.	n.a.	n.a.	61

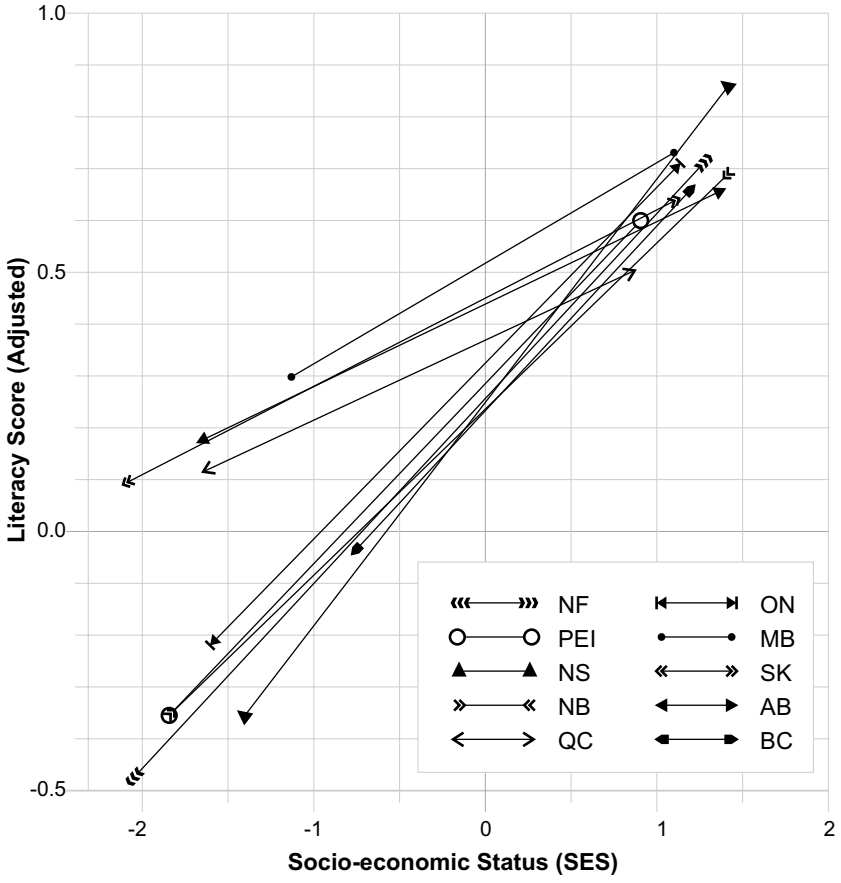
a new provincial curriculum. For what they are worth, however, the tests show that the proportion of students reaching or exceeding the provincial standard is not much better than half, and often well below it (Table 1).

Although the unsettled nature of these tests makes comparisons over time impossible, a 1997 pilot math test of grade 6 students duplicated some questions from a 1989 provincial math test and found that over the eight-year interval, the proportion of correct answers in number sense and numeration had dropped from 79 to 73 percent, and in measurement from 70 to 65 percent.[9]

Relatively Dispersed Student Achievement

The dispersion of achievement scores in Ontario is perhaps the most disconcerting evidence of failure to fulfill the ideals of publicly funded education. Socio-economic status and educational outcomes are correlated everywhere, but the link in Ontario is especially tight. Research has found that in Ontario there is a larger gap between the achievement of higher- and lower-socio-economic status students than there is elsewhere (Willms 1997). The differences between students from less and more promising socio-economic backgrounds in grade 7 and 8 math scores in TIMSS, for example, were greater in Ontario than elsewhere in Canada. Also, the link between socio-economic status and adult literacy in the IALS was far stronger in Ontario than in Quebec and the

Figure 1 SES Gradients for Youth, 1994 IALS



Source: Willms 1997, 19-21

prairies, where less advantaged young people scored closer to average than to less advantaged Ontarians (Figure 1).

A particularly disconcerting indicator in this context is the share of students that the new provincial tests miss—students who are exempted from the tests altogether, or whose results fall into the "no data" and "not enough information to score" categories. In the grade 3 reading tests, for example, 12 percent of students fell into these categories province-wide. And these no-results rates varied greatly from board to board: in 16 boards the exclusion rate was 15 percent or higher, and in three boards, it was 20 percent or higher. Table 2 provides two

Table 2 **Students Missed in 1999/2000 EQAO Grade 3 Reading Test**

Ranked by Shares	%	Ranked by Numbers	#
Northeastern Catholic DSB	24	Toronto DSB	2520
Superior North Catholic DSB	21	Toronto Catholic District School Board	940
Keewatin-Patricia DSB	20	Ottawa-Carleton DSB	690
Nipissing-Parry Sound Catholic DSB	19	Thames Valley DSB	600
DSB Ontario North East	19	Dufferin Peel Catholic DSB	580
Rainy River DSB	19	Simcoe County DSB	560
Hastings and Prince Edward DSB	17	Durham DSB	550
Kenora Catholic DSB	16	Waterloo Region DSB	540
Near North DSB	16	Peel DSB of Education	500
Huron-Superior Catholic DSB	16	Hamilton-Wentworth DSB	490
Northwest Catholic DSB	16	York Region DSB	460
Rainbow District School Board	15	Kawartha Pine Ridge DSB	420
Algoma DSB	15	Upper Canada DSB	380
Grand Erie DSB	15	Grand Erie DSB	330
Upper Canada DSB	15	Hamilton-Wentworth Catholic DSB	330
Hamilton-Wentworth Catholic DSB	15	DSB of Niagara	320
Catholic DSB of Eastern Ontario	14	Greater Essex County DSB	300
Kawartha Pine Ridge DSB	14	Ottawa-Carleton District Catholic School Board	290
Superior-Greenstone DSB	14	Halton DSB	280
Bruce-Grey Catholic DSB	14	Hastings and Prince Edward DSB	230
Limestone DSB	14	York Catholic DSB	230
Simcoe County DSB	14	Limestone DSB	230
Toronto DSB	13	Durham Catholic DSB	230
Peterborough Victoria Northumberland and Clarington CDSB	13	Hamilton-Wentworth Catholic DSB	220
Brant Haldimand Norfolk Catholic DSB	13	Lambton Kent District Public School Board	220
Waterloo Region DSB	13	Wellington Catholic DSB	210
Toronto Catholic District School Board	13	Bluewater DSB	200
Lakehead DSB	13	Windsor-Essex Catholic DSB	190

Ottawa-Carleton DSB	13
Algonquin and Lakeshore Catholic DSB	13
Greater Essex County DSB	12
Bluewater DSB	12
Wellington Catholic DSB	12
Renfrew County DSB	12
Hamilton-Wentworth DSB	12
Avon Maitland DSB	12
Durham DSB	12
Renfrew County Catholic DSB	11
Hamilton-Wentworth Catholic DSB	11
Lambton Kent District Public School Board	11
Durham Catholic DSB	11
Trillium Lakelands DSB	11
Windsor-Essex Catholic DSB	10
DSB of Niagara	10
Dufferin Peel Catholic DSB	10
St. Clair Catholic District School Board	10
Thames Valley DSB	10
Thunder Bay Catholic DSB	10
Simcoe Muskoka Catholic DSB	10
Halton Catholic DSB	10
Ottawa-Carleton District Catholic School Board	10
London District Catholic School Board	9
Huron-Perth Catholic DSB	9
Halton DSB	9
York Region DSB	8
York Catholic DSB	7
Upper Grand DSB	7
Sudbury Catholic DSB	7
Waterloo Catholic DSB	6
Peel DSB of Education	6

Upper Grand DSB	180
Halton Catholic DSB	170
Avon Maitland DSB	170
Trillium Lakelands DSB	160
Rainbow District School Board	160
Simcoe Muskoka Catholic DSB	160
Near North DSB	160
Catholic DSB of Eastern Ontario	160
Peterborough Victoria Northumberland and Clarington CDSB	150
London District Catholic School Board	140
Algoma DSB	140
Lakehead DSB	130
Algonquin and Lakeshore Catholic DSB	130
DSB Ontario North East	120
Waterloo Catholic DSB	100
Brant Haldimand Norfolk Catholic DSB	100
St. Clair Catholic District School Board	100
Renfrew County DSB	100
Huron-Superior Catholic DSB	90
Keewatin-Patricia DSB	80
Northeastern Catholic DSB	70
Thunder Bay Catholic DSB	60
Nipissing-Parry Sound Catholic DSB	50
Renfrew County Catholic DSB	50
Sudbury Catholic DSB	40
Rainy River DSB	40
Bruce-Grey Catholic DSB	40
Huron-Perth Catholic DSB	40
Superior-Greenstone DSB	30
Northwest Catholic DSB	20
Superior North Catholic DSB	20
Kenora Catholic DSB	20

perspectives on this problem: one panel ranks boards by the proportion of students for whom no result was recorded in reading; the other ranks them by the number of students for whom no result was recorded.[10] Given that the vast majority of the students for whom there were no results were exempted from the test or failed to produce interpretable results, it is likely that most of them would do poorly if they were tested. The system's failure to monitor their progress bodes ill for their catching up with their fellows before they either graduate or drop out.[11]

Why Low and Widely Dispersed Achievement Matters

Low average levels of achievement are highly worrisome, as is the fact that public schools in Ontario are doing less well at providing a common starting-line in life for the less advantaged.

In terms of economic considerations, it is well known that the dispersion of earned incomes in Canada has tended to increase since the early 1970s. Searches for the cause of rising inequality in earned incomes tend not to find convincing evidence for plausible culprits such as freer trade and technological change, leading some to speculate that the schools are not preparing many students for work life as well as they once did (Kuhn 1998, p. 374-375). Cross-country research suggests that countries in which students' scores on achievement tests are more unequal also tend to show greater dispersion of wage income among those age cohorts later in life (Bedard and Ferrall 1997).

Public Opinion

Public opinion surveys show recognition that the situation in Ontario's publicly funded schools leaves a lot to be desired. Since 1986, the share of respondents to Angus Reid surveys saying the quality of education was worse than it was 25 years ago has gone from 36 to 45 percent, while the proportion saying it was better fell from 42 to 26 percent. In 1996, barely more than half (53 percent) of Ontarians polled by Angus Reid said they were very or somewhat satisfied with public education in the province (ARG 1999); by 2000, that share had dropped to 43 percent. Tellingly, satisfaction was 10 percentage points lower (at 36 percent) among low-income Ontarians than it was among their high-income counterparts (ARG 2000).

Figures on relative enrolment growth also tell a convincing story. From 1987/88 to 1998/99, the average annual increase in regular public

school enrolment was 0.9 percent. In publicly funded Catholic schools, the equivalent figure was 2.3 percent. Meanwhile, private school enrolment rose 3.5 percent per year: more than 90,000 students (4 percent of the total) now attend private schools, up from just over 60,000 in 1987/88.[12] And home schooling has grown explosively, from a negligible number in the 1980s to possibly 5,000 now.[13]

Funding and Governance

These indications of dissatisfaction prompted attention from both the NDP provincial government in the early 1990s and the Progressive Conservative government that replaced it in 1995. These governments took several steps intended to improve the system's performance, including a new curriculum, the reinstatement of testing, a new funding formula, and the amalgamation of school boards. The common theme behind these reforms was centralization. Provincial bodies now exert more influence than they did a decade ago. These bodies include most notably the Ministry of Education and Training, but also the Education Quality and Accountability Office (EQAO), the task force that oversaw school-board amalgamation, the Education Improvement Commission (EIC), and the newly established Ontario College of Teachers.

Another area of major change has been funding. Reforms in 1997 followed trends in other jurisdictions: a per-student funding formula that attempts to take into account such diverse considerations as educational needs, physical plant, and transportation. The intent was both to provide more equal amounts for students across the province than under the earlier system where school boards had access to the municipal tax base and, more important from the government's point of view, to try to force boards to cut spending on overheads.

The structure and functioning of school boards has changed in more ways than simply financial. Ontario's boards have now gone through yet another round of amalgamation. Thanks to amalgamation and amplified regulatory powers for the minister of education, elected school-board trustees have lost power.

The Deadlock: Limits to Top-Down Reform

Better performance is far from guaranteed, however, and there are important reasons for doubting that, on balance, further centralization of Ontario's education system is going to achieve it. Locating more levers

of power in the Ministry of Education does not necessarily mean that they will be used well, or indeed that they will be used at all.

Ontario's education officials are notorious for ignoring the conclusions that years of research have led to concerning effective pedagogy. One example concerns the teaching of reading. Despite generations of evidence on the superiority of phonics over other methods of learning to read (Chall 1967; Adams 1989; Foorman et al., 1998; Watson and Johnson 1998; Robertson 1999), phonics instruction is absent from many classrooms. When the Canadian Psychological Association called for more use of phonics in reading instruction in 1992, the response from ministries of education was dismissive or hostile (CPA 1992).

What research shows to be effective is often loosely if at all connected to common practice—the superior results from teacher-directed instruction over child-centred learning (Engleman et al. 1988; American Institutes for Research 1999);[14] full-year versus semestered programs;[15] the importance of homework marked by teachers rather than by peers (EQAO1998, 6); and the healthier learning climate in small versus large schools (Coleman 1994, 34). These examples and others like them exist in many public education systems. They reflect the fact that, among administrators of these systems, academic achievement is only one objective among many, and often not a particularly high one. Under those circumstances, centralized control over program delivery may hurt, rather than enhance, the effectiveness of classroom practice.[16] There is, in short, no reason to assume that the additional levers of power now installed at Queen's Park will be used in ways that will enhance achievement.

Indeed, there is no reason to assume that many of these levers will be used at all. I have already referred to the large average exclusion rates in the EQAO's tests, and to the variation in those rates from board to board. This abdication of responsibility to monitor and account for the performance of less able students ought to be a scandal but, to the best of my knowledge, there have been no consequences of any kind for the administrators responsible.

This uneven commitment to student achievement makes it unlikely that a central push to raise the achievement of Ontario's students will be successful. Since average achievement levels are not impressive and the situation of many less advantaged students is bleak, this is an unsatisfactory prospect. Those seeking a better performance from Ontario's schools need to relinquish the hope that centralist reforms will provide it, and instead consider reforms that would unleash pressure from the bottom up.

Unleashing Bottom-Up Pressure to Improve Education

Provided that provincial standards and consistent measurement of achievement against those standards exist or are on their way, there are two ingredients to any bottom-up strategy. On the one side, schools need autonomy to improve their practice without direction from above, and sometimes in opposition to it. On the other, all parents—not just those with greater financial resources or the ability to make extraordinary sacrifices—need empowering to choose among schools, so that effective schools are rewarded with rising enrolments and funding, and less effective schools feel pressure to improve. School autonomy and parental empowerment separately may do some good: together, they could revolutionize Ontario's publicly funded schools.

School-Based Governance

When it comes to school autonomy, Ontario's education system currently divides into sharply contrasting categories. Independent schools operate quite freely: they are subject to health and safety regulations and occasional inspections, but one legacy of many years of weak provincial standards and no testing is an unclear mandate for the inspections. Publicly funded schools, by contrast, have little autonomy: principal selection is a board function; staffing decisions are largely circumscribed by board-union agreements; and budget-allocation and purchasing are largely controlled by the province and board-union agreements. Some boards have established schools with distinctive programs and pedagogical styles, but these schools have no independent standing and can be changed or abolished at a board's discretion.

Since the late 1980s, there has been sporadic interest in following steps elsewhere toward more effective school-level governance. The NDP government mandated school councils—bodies consisting of elected representatives of parents, teachers, non-teaching staff, community members, and (in some schools) students—in the mid-1990s, and the Conservative government legislated them in Bill 160.

To date, however, this initiative has been purely symbolic. Councils are advisory only, and there are no requirements for principals or boards to demonstrate that they listen to councils' advice or even to ensure they exist. A review of the situation of school councils by the EIC in 1998 recommended that they should remain powerless (EIC 1998). As the Ontario Parent Council has warned, this situation creates a vicious circle of disillusionment among originally enthusiastic council

members, followed by disengagement. If councils' performance deteriorates as a consequence, this route to school-level governance could turn out to be a dead end (OPC 1998).

An optimist could make a case that the movement for greater autonomy of publicly funded schools will gain ground in the next few years. Bill 160 removed principals and vice-principals from the teacher unions. If British Columbian experience is a guide, their changed status may encourage principals to look to their local schools for support that they cannot obtain from boards or teachers. Some boards are soliciting the input of councils in principal selection. The Ministry of Education is now surveying council activity and members' views, apparently inspired by a desire to make involvement on councils more effective and rewarding.

This seems unlikely. Board amalgamation increased the distance between individual schools and board representatives. In the biggest board in the province, Toronto, local consultation on principal selection and staff-class allocations in elementary schools existed before amalgamation, but disappeared in its wake. Past Ministry and EIC initiatives around school councils have yielded boilerplate statements about the value of parental involvement and local input, but no substantive change.

The problem is not lack of effective ideas. It would be possible, for example, to design a system allowing councils that wished extra powers, all the way to principal selection, to take them up, while leaving those happy as they are unchanged (OPC 1998). The most recent OISE/UT survey found that more than one third of Ontarians favour giving councils the power to hire and fire principals. Since it is unlikely that the distribution of opinion across the province is uniform, probably in some schools, solid majorities would wish such powers (Livingstone et al, 2000). The problem is that the bulk of the players at the provincial level—politicians and bureaucrats alike—are comfortable with the status quo, and have little sympathy with a decentralized system that might be harder to control.

Many advocates of more local control look enviously at the explosion of charter schools in the United States and at Alberta, where charter schools have been operating since 1995. The rapid spread of US charters in areas where regular public schools were failing dismally—particularly poor inner-city neighbourhoods—shows how the pressure to empower parents (and teachers) badly served by the existing system can overcome the opposition of teacher unions and board bureaucrats.[17] Now that most US states have chartering laws, templates are available

off the shelf. Alberta's experience provides further evidence of the demand for charter schools—evident in both the satisfaction of parents whose children attend them and long waiting lists—as well as home-grown lessons about how to design charter legislation (Bosetti et al. 2000). Much of what chartering involves is consistent with potential expanded roles for school councils along the lines just mentioned.[18]

Again, however, the prospects for charter schools in Ontario in the near term are not good. The bulk of the players at the provincial level have either strong vested interest in the current system, or find the ideas of decentralization and local empowerment that inspire charter schools just plain weird. A telling illustration of this unpromising combination occurred when the EIC released its 1997 report on the future of school boards (EIC 1997). Following hearings whose line-ups reflected the financial and organizational power of teacher unions and schools boards, the EIC recommended that Ontario not establish charter schools, a recommendation that was both gratuitous—the EIC's mandate for the investigation had asked no such question—and based on no research.[19]

Expanding Choice with Partial Funding of Independent Schools

If the movement toward more effective school governance in the publicly funded system is stalled, the obvious alternative is to make the advantages of schools that already have autonomous governance—the province's independent schools—available to parents who cannot now afford them. Ontario is the only Canadian province outside the Atlantic region that provides no financial support to independent schools. Neither the federal nor provincial income tax provides relief for elementary- and secondary-school tuition, so even modestly priced independent schools pose a burden that most families, especially those with several children, are ill positioned to bear.

The fact that, despite this burden, independent school enrolment is growing far faster than enrolment in the publicly funded system testifies to the attraction of more autonomous schools. The appeal of many of these schools to families stems partly from the characteristics of other families that choose them, but that is not the whole story. Large-scale research on achievement scores of students from similar social backgrounds testifies to independent schools' ability to do more—and at lower cost—than their public counterparts, and the results appear strongest for minority students in large cities. It is intriguing to note

the tendency for jurisdictions whose IALS scores showed a looser link between achievement and socioeconomic status to be those offering more choice.[20] Cause and effect are open to debate, and the sample is small, but this evidence is consistent with the view that choice offers less advantaged families more opportunity to send their kids to better schools. Any increase in the dispersion of achievement caused by better-motivated families moving their kids first is overcome in the longer term by the pressure on inferior schools to improve.[21]

Like charter legislation, formulas for independent school funding are available off the shelf. British Columbia, for example, provides qualifying independent schools with per-student grants equal to either 50 or 35 percent of the adjusted per-student cost of the local public district. The larger grant goes to schools with per-student operating costs equal to or less than those of the local district; the smaller grant to those whose costs are above it.[22] Alberta is currently phasing in a funding formula for independent schools that will provide an amount equal to 60 percent of the per-student basic grant provided to public schools.[23] Alberta's formula is not sensitive to, and places no restriction on, independent school fees or operating costs, although it does require independent schools to operate for one year before becoming eligible for funding. In both provinces, independent schools receiving funds are subject to audit and inspection by the provincial ministry of education.

As this book was going to press, the Ontario government had just presented a budget in which it proposed to establish a tax credit for independent school tuition. Once mature, in five years' time, the tax credit will be worth $3,500. This approach has much the same effect as direct grants to independent schools would have, although there are some important distinctions. On the positive side, the parents continue to pay the entire tuition, rather than facing the dilution of the purchaser/provider relationship that direct grants might create. On the negative side, the packaging of the funding initiative as a tax measure means that the cost will not appear, as it ought to do, as part of the education ministry's budget, which means that achieving savings as students move from the public to the independent system will require more political courage and management acumen.

That said, tax credits for tuition at independent schools that are willing and able to qualify is attractive because they are simpler and quicker to implement than legislation giving school councils (potential) executive powers or allowing the creation of charter schools. They will immediately lower the barriers to families with limited means who

wish to withdraw their children from under-performing schools. As long as the departure of those children is reflected through the per-student funding formula to the regular public system, they would provide an immediate spur to under-performing boards and schools to turn themselves around.

As the budget proposal recognized, moreover, the cost of partial funding can be tailored to the provincial budget— low at the start, when it would represent a net addition to current education spending, and more generous later, when growing independent school enrolment began to tip the balance to a net saving (Box 1). There might be indirect savings as well, since the widespread current practice whereby boards fight budgetary restraint by making the most painful cuts first would be harder to sustain when independent schools were operating nearby on lower budgets (OQE 2000, 3). This is an area where good education policy will free up fiscal resources in the long term—money that could be applied to other purposes, even including judicious investments in the fully funded public system.[24]

It is encouraging that polling numbers suggest that funding independent schools is politically viable. When pollsters ask what schools should receive funding, provided they meet provincial standards, a plurality (around 40 percent) support the status quo, about one-quarter favour funding regular public schools only—that is, defunding all Catholic schools—and about one-third support funding for other religious schools also or, more frequently, all private schools (Livingstone et al. 2000). There is already a sizeable constituency for independent-school funding, and principled political leadership should be able to increase its size.

In a diverse, tolerant society such as Ontario, fears of religious fragmentation are easily countered by evidence that achievement and behaviour are, to say the least, no worse in religious schools than in secular ones, and that the graduates of religious schools are every bit as good citizens as graduates of public schools.[25] The argument that independent school funding or tuition tax credits will drain hundreds of millions of dollars from the public system presupposes that current publicly funded schools are so bad that offering alternatives would produce a mass exodus—clearly an argument for offering alternatives. Not only would tens of thousands of students attend better schools, but if the province reduced grants proportionately to the boards they were leaving (as described in Box 1), there would be unprecedented moves to replace poorly performing trustees, bureaucrats, principals, teachers and programs with better ones.[26]

Box 1 Potential Fiscal Impact of Tax Credit for Independent School Tuition

The Ontario government has proposed a tax credit for independent-school tuition. The credit, which would be refundable, would offset 10 percent of tuition costs up to a maximum tuition of $7000 for students enrolled in qualifying independent schools in 2002. It would rise by an additional 10 percent annually until it reaches 50 percent—$3,500 for the maximum tuition of $7000—in 2006. How might this credit affect the provincial budget? Making such an estimate requires a number of assumptions.

First, as far as total system costs are concerned, suppose that

- total enrolment in all schools grows 1.4 percent annually from a 2002/03 level of 2.23 million; and
- per-student spending in the publicly funded system grows at 3 percent annually (2 percent inflation plus 1 percent real) from a 2002/03 level of $6,700.

Turning to the independent sector, suppose that

- enrolment would have grown at its historical rate of 3.5 percent from a 2002/03 level of 97,000 without the tax credit;
- the credit causes the share of students attending independent schools to rise by 4 percentage points (not quite to the level in British Columbia) over 5 years, with the increase occurring in equal annual percentage amounts;

	Base Enrolment in Independent Schools *000s*	Incremental Enrolment in Independent Schools *000s*	Total Enrolment in Independent Schools *000s*	Eligible Students *000s*
2002	100	0	100	90
2003	104	15	119	107
2004	108	32	140	126
2005	111	54	165	149
2006	115	80	195	176

Note: Numbers may not multiply exactly due to rounding.
Source: Author's calculations as explained in the text.

- delays in certification, and failure or refusal of some schools to participate, means that 90 percent of students at independent schools attend schools that qualify for the credit; and
- half of students attending qualifying schools incur tuition in excess of the $7,000 maximum; for the other half, tuition rises 3 percent annually from a 2002/03 average of $6,000.

The fiscal impact of the tax credit under these assumptions is illustrated in the table. In the first year, the credit is an additional cost to the province, since there is no migration of students from the fully funded to the independent sector. In each subsequent year, however, movement to the independent sector reduces costs in the fully funded sector, offsetting the increase in the value of the credit. By 2006, when phase-in is complete, the saving to the fully funded system equals the cost of the credit.

Potential savings, as students transfer from the fully funded to the independent sector, will not automatically be realized, but will require political determination. In the scenario illustrated here, enrolment in the fully funded system would still grow—the fixed costs would not be spread over a smaller number of students—but savings might be realized as departing students curb the rate of enrolment growth. The more important question is whether or not migration of students from fully-funded to independent schools *ought* to reduce funds to the boards that lose students. In my view, it should: the prod of reduced funding is a key element in the tax credit's potential to induce the fully-funded system to perform better.

Average Tax Credit *$*	Cost of Tax Credit *$ millions*	Per-student Grant in Fully Funded System *$*	Saving to Fully Funded System *$ millions*	Net Fiscal Impact of Tax Credit *$ millions*
650	59	6,700	0	59
1,318	141	6,901	101	40
2,005	253	7,108	231	22
2,711	404	7,321	396	8
3,438	604	7,541	604	0

Privately Funded Vouchers

Even with tax credits in place, however, independent school tuition will still impose a barrier to many low-income parents. For that reason, it would also be desirable for private entrepreneurs and philanthropists to establish scholarships that would help even small numbers of students leave poorly performing publicly funded schools for better independent ones. Since other contributors to this volume take the subject of private scholarships up further, I will make only two observations.

First, US experience suggests that such programs, even on a limited scale, spread their benefits beyond the few families able to participate. Like partial funding of independent schools, private vouchers can spur improvements in the schools and boards the students leave, benefitting those who stay as well as those who go.[27] And if US experience is any guide, the actual use of private vouchers by lower-income families will help dispel one of the most pernicious myths propagated by opponents of parental choice: the myth that poor people are unable or unwilling to pick good schools for their children.[28]

Second, private scholarships will be a more powerful tool for inducing change in publicly funded schools than, say, corporate funding for computers in the classroom, or forums in which educational "insiders" and businesspeople vie in emphasizing their commitment to education. Funding and praise are useful motivators, but they are less powerful in keeping an enterprise focused on serving its customers well than fear that ill-served customers will take their business elsewhere.[29]

Concluding Thoughts

To sum up, deadlock seems an apt way to characterize the current state of publicly funded education in Ontario. The centralizing thrust of policy has produced an environment where local schools, those who work in them, and the families whose children attend them, have little influence, and where bottom-up pressure to improve is extraordinarily weak. On their face, the prospects for raising the average achievement of Ontario students and narrowing the large gap between those from more and less promising socioeconomic circumstances do not look good.

Discouraging though this prospect is, promising options lie close to hand. The province's move toward testing represents an important first step in setting standards for achievement and measures of progress. Similarly, per-student funding and the existence of school councils in

most Ontario schools are key elements in a system that could create bottom-up pressure to meet those standards. The next step is to empower schools and families so that this bottom-up pressure begins to work.

Ideally, that empowerment would involve two complementary measures. On the governance side, schools would receive new powers over staffing, budget, and program, either through new decision-making authority for principals and councils that wish it, or through charter-school legislation, or both. On the funding side, implementation of the tax credit for independent school tuition, and ensuring that departures from the fully-funded system are reflected in cuts in per-student grants, will create competitive pressures for schools to use their autonomy in the service of student achievement.

This book should make a welcome contribution toward making those alternatives more familiar. And if it inspires the creation of even a small program of private scholarships, it will do two more things. It will provide previously unimagined opportunities to at least a few less well off families. And it will demonstrate how parental choice can generate powerful bottom-up pressure for better schools.

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Notes

1 In 1995, the last year for which comparative data are available, per student spending in Ontario's elementary and secondary schools was $7,617, nearly 9 percent higher than the next-ranked province of Quebec, and 14 percent above the Canadian average. Converted to US dollars at purchasing-power-parity exchange rates, Ontario's spending was roughly equal to the OECD leader, the United States, and nearly 50 percent higher than the OECD average (SC/CMEC 2000, 212)

2 In the 1982 Second International Mathematics Study and the 1988 and 1991 International Assessments of Educational Progress, Ontario's results, lower than those of other provinces, dragged Canada's overall scores down to middling levels on the international scale (McLean et al., 1984; Lapointe et al., 1989; Lapointe et al., 1992a and 1992b).

3 Ontarians tend to console themselves that at least they outdo their neighbours to the south, but Alberta was the only province to outrank the US average in either subject; Ontario was well below it.

4 TIMSS also tested the final year of high school, with results that were more encouraging but harder to interpret. In the countries covered, nearly all children of elementary and middle-school age are in school and taking most sub-

jects. By school-leaving age, however, this is not so, leading the test designers to focus on the top 10 percent of students in selected countries. In math, Ontario's top students scored relatively well; in science, however, their performance was in the lower half of the rankings. In both cases, the positive nature of these results was muted by the absence of the perennially strong performing Asian countries (Robitaille 1998), and by the fact that most Ontario students had received 13 years of schooling, rather than the 11 or 12 typical elsewhere (Schweitzer 1998, 8).

5 A summary of SAIP results can be found in SC/CMEC 1999, 78-79, 223-24.

6 Provinces with appreciable bilingual populations report for anglophone and francophone students separately.

7 An early striking study of the dispersion in marks assigned in such tests is Diederich, French, and Carlton 1961. Wolfe, Riley and Traub (1999) estimate that the accuracy rates of individual marks in the 1997 EQAO tests was between 70 and 80 percent. These authors claim that such accuracy is similar to that found in multiple-choice tests, but multiple-choice tests have no marking errors of this type: the performance-based tests add a further layer of uncertainty to problems such as inexact match with curriculum and variations in individual performance at different times that are common to both types of tests.

8 These are shares of the entire population, including students who were exempted or submitted work that was judged impossible to score. The introduction of a new curriculum complicates comparisons between elementary-level results in 1997 and those in later years.

9 The proportions had not changed in problem-solving and geometry. EQAO 1997.

10 Panel b of Table 2, which shows absolute numbers, might appear unduly hard on boards with large student populations. From the perspective of an evaluator or policymaker seeking to reduce the number of students missed by these tests, however, it might make sense to focus more on reducing the rates in relatively large boards.

11 Principals have the power to exempt students from the EQAO tests "if a student would be unable to participate productively or if her or his participation would be harmful" (EQAO 2000b, 20).

12 Enrolment figures are available under "Quick Facts" at www.edu.gov.on.ca.

13 Since many homeschoolers do not register their children, it is hard to be sure about the true number. The fact that the two leading home-schooling organizations in Ontario have 2,000 families as members, many with more than one child at home, suggests a likely total of around 5,000.

14 Project Follow-Through researchers graded nine education approaches according to their effectiveness in raising students' scores in basics, cognitive concepts, and affective outcomes such as sense of self-worth. Direct instruction dominated other approaches, not only for basic knowledge and problem-solving skills, but for raising students' self-esteem. The study has received far more attention among outsiders to the education system than it has among insiders (Kelly 1993/94); among Canadian teachers, it seems to be virtually unknown (Maloney 1998, 184).

15 In the 1997 SAIP, for example, 71 percent of 16-year-olds in full-year programs scored at or above the expected levels in math, compared to 55 percent of their semestered counterparts.

16 Research into the relationship—or, more accurately, lack of it (Hanushek 1996)—between money spent and student achievement has tentatively identified bureaucratization and centralization as explanations for the failure of more money to improve schools over the last generation (Betts 1996).

17 In the 1997/98 school year, the share of white students attending US charter schools was more than 10 percentage points below the share of white students attending regular public schools in chartering states, with higher enrolments among blacks, Hispanics and students of aboriginal origin making up the difference. Charter schools enrolled a higher proportion of students eligible for lunch subsidies than did other schools in chartering states (US DOE 2000, 30, 34).

18 About one-fifth of US charter schools are converted regular public schools, ten percent are converted private schools; the rest are start-ups. Of those that had been regular public schools, more than one third who responded to a Department of Education survey said they switched to gain autonomy and flexibility (US DOE 2000, 14, 43).

19 The EIC report's bibliography contained not one reference to the voluminous US literature on charter schools, nor to any Canadian writings on the subject. An EIC staffer confirmed to me that there was no research to support this recommendation.

20 The four Canadian provinces with relatively flat gradients have all provided funding to at least some independent schools for many years. Among the countries, Sweden and the Netherlands, which have well established independent school funding, had much flatter gradients than the United States, Britain, and New Zealand, where such schemes do not exist or are relatively new (Frempong and Willms, 1999, 2).

21 See the chapter by Caroline Hoxby in this volume for further evidence of the benefits of choice among public schools on student achievement and efficiency.

22 The adjustment subtracts funds related to capital items as well as several special-education categories. A brief summary of independent school funding and regulation in British Columbia can be found in BC 1999.

23 Independent schools in Alberta receive no funds for transportation, capital, or maintenance, and have no access to education property taxes. A special regime covers special-education students. A quick brief summary of recent changes in independent school funding in Alberta can be found in Alberta 1998.

24 British Columbia's Office of the Inspector of Independent Schools estimates that educating the province's independent school students in the public system would add more than $130 million in annual operating grants to the provincial education budget, and impose a further $750-million to $1 billion in new capital funding (BC 1999).

25 For an account from a *Toronto Star* reporter who took a year studying religious schools and emerged with her initial negative prejudices undone, see Sweet 1998. See also the chapter by Jay Greene in this volume, where he compares the effect of public and private schools on the civic values of their students and graduates.

26 For a number of accounts of such turnarounds, see Finn et al. 2000.

27 Again, whether this potential is realized depends partly on the provincial government's willingness to ensure that lower enrollment is reflected in proportionately lower funding.

28 For a useful account of evidence about the primacy of academic concerns and the desire for more discipline in the classroom among lower-income US families with children in independent schools, see Coulson (1999, 260-62).

29 The experience of Pepsi, which announced that it would donate to a voucher program for low-income children in Jersey City, provides a cautionary tale. The company withdrew the offer in the face of boycott threats by the public-school teachers union and widespread attacks on their vending machines (Lindsay 1995). Foundations and other organizations less exposed to intimidation may be better placed to see such programs through.