

An Evaluation of the Charter School Movement in Alberta

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Abstract

Under a long-standing Progressive Conservative government the province of Alberta, Canada in 1994 became the first and only province in the country to introduce charter schools into its public system. What was cautiously introduced as an innovation and best practice pilot program has become a well sought-after alternative for parents of the public school system. This research is based on a review of the available literature and previous research on Alberta Charter schools and includes a survey of current school documents, websites and government documents pertaining to charter school regulation and governance. Part I of this analysis presents Alberta's Charter School movement's design using the analytic framework of finance, regulation and information. Part II will apply these design elements to four criteria for evaluating privatization systems: choice, productive efficiency, equity and social cohesion. Part III looks at some of the political and regulatory constraints facing the charter school movement. Taking into account the three design dimensions and four criteria of charter school evaluation, the result for Alberta in practice is a system that ultimately prioritizes social cohesion over choice and productive efficiency over equity. With a mere 14 charters in operation as of January 2008, Alberta's charter school system has a bark that is much bigger than its bite. The threat of charter schools has stimulated competitive response from neighboring local school districts in the form of new programs of choice for parents of public schools. It is clear that the idea of choice is very important to Albertans, yet the politics driving the movement's expansion, renewal and regulatory environment appear to be rooted in the greater philosophy of social service delivery that embodies Canadian socio-political ideology: an ideology of continued public delivery and control of education.

Introduction

“Albertans live in an era characterized by educational consumerism and a belief that parents and students are the “customers” of schools. Therefore, the educational landscape includes the piloting of charter schools, mandated parent councils for every school, the privatization of some school services, and a de facto voucher system.”

-Webber, 1995 p.5

Choice in Alberta: A Brief History

School choice, it is argued, has been a part of education in Alberta since its inception as a province within Canada in 1905. The Alberta Learning website clearly states; “Choice is one of the important principles Alberta's education system is built on. The opportunity for choice reflects the Alberta government’s commitment to quality education — the solid foundation every child needs to learn, grow and succeed.”¹ Beginning with the guarantee of section 17 of the *Alberta Act, 1905* minority faith communities (Protestant or Roman Catholic) in Alberta were granted the right to form a separate school district in this province.² Over the past century, Alberta has incorporated public, Catholic and Protestant, Francophone, accredited private, and charter schools into its publicly funded selection. (See Table 1) Further, Alberta parents can choose from a number of specialized programs which include home education, online/virtual schools, outreach programs and alternative programs.³ The quasi-voucher system in place in Alberta today began with the provincial government’s decision in 1967 to partially fund private school operating budgets. In 1998, the province stepped up its efforts to boost choice and following the recommendations of the Private School Task Force, Alberta increased its funding of private schools to nearly 60% providing the school was accredited through provincial curriculum standards. By 2001, 176 private schools were accredited and receiving public monies, while only 16 remained independently registered private schools.⁴ Additional mechanisms of choice in Alberta have been implemented through partially funding home-schooled students subject to stringent regulatory demands (Fraser Institute Freedom Index, 2003). Funding may be provided to

1 <http://education.alberta.ca/parents/choice.aspx>

2 Alberta Learning, (2007) Establishing a Separate School District, Information Package, http://www.education.alberta.ca/media/431889/2006_establishing_a_separat_sd.pdf

3. <http://education.alberta.ca/parents/choice.aspx>

4 Alberta Learning, <http://education.alberta.ca/parents/choice.aspx>

home education students through the school jurisdictions and accredited private schools that have agreed to supervise and provide them with learning resources.⁵

Table 1 The Alberta Education System: 1997- 2007								
	Public School	Separate (Protestant or Catholic)	Franco-phone	Charter Schools	Private School	Private ECS Operator	Home Education/ Blended Schooling	TOTALS
# of Schools (2007)**	1,408	344	29	18	165	126		2,105
Enrollment 1997/98	410,277	120,619	1,841	2,131	26,144	4,800	Not Available	561,012***
Enrollment 2006/07	413,453	133,721	4,916	6,634	25,280	3,100	9,573	596,677
Market Share 1997/98#	72.5%	21.3%	0.32%	.37%	4.6%	0.84%	Not Available	100%
Market Share 2006/07	69.29%	22.41%	0.82%	1.11%	4.24%	0.52%	1.6%	100%
Funding	Public (Capital and Operating costs)	Public+ Private	Public	Public (No Capital)+ Private	Private/ Public	Public^	16% of Public per/student amounts provided ⁺	\$5.8 Billion (2007)
School Authorities (2007)	41	16	5	12	138	115		331

* Accredited Private schools are eligible to receive ~ 60% of Public School funding equivalent (in 2001 this was \$2544 per student)

** Alberta Education, January 30, 2007

http://education.alberta.ca/ei/reports/pdf_files/eis1004_1998/eis1004body.pdf

+Fraser Institute, 2007

^Association of Independent Schools and Colleges in Alberta (AISCA), Web Site at www.aisca.ab.ca

***For these calculations, the ECS Private Enrollment is counted twice in Alberta Education enrollment totals, so the grand total of student population used to calculate market share was 565,812 students (not the Alberta Education total Public Figure of 561,102 for 1997/98)

Edmonton, AB: The Site-Based Management City

The idea of choice is not a new phenomenon in Alberta, and nor are the operational and managerial characteristics associated with charter schools. Well known throughout North America as one of the maiden cities for institutionalized choice, Edmonton, Alberta was one of the first school divisions to

⁵ Alberta Learning Planning Branch 2007

enable individual schools to provide choice to parents through open boundaries beginning in 1974. Space permitting, students became eligible to enroll in any school in the entire district. From a management perspective, the Edmonton School District is well known for its entrepreneurial practices of site-based management and school- controlled budgets,⁶ where individual schools control staffing and programming decisions.⁷ School-based budgeting has been in operation since 1976 for Edmonton, where 80% of budgetary control is allotted at the school level. Market-based tactics are commonplace in Edmonton and are evidenced through "weighted student" funding, where funding follows the child, and in instances where schools are not satisfied with the assistance available to them from the district's primary source- Central Services, they have the power to take their business to outside vendors.⁸ "At the heart of these arrangements is the premise that organizations run best when decisions are made closest to the customer."(Archer, 2005 p.34) In 2005, Edmonton's former Superintendent Angus McBeath described Edmonton's school system to a group of Minnesota visitors as "an endless system of reform," where a continual adaptation of ideas is as important as the reform itself.⁹

Management and budgeting aside, Edmonton has chosen to centralize some aspects of its operations. In 2002, instructional reform became centralized in Edmonton, through the implementation of unified improvement plans regarding instructional and professional development across schools.¹⁰ The new collective approach to instruction has been hailed as an appropriate compliment to the decentralized management and budgetary approach taken in Edmonton, according to Michael Fullen in a 2005 Education Week Article.¹¹ Edmonton is reportedly faring well in achievement relative to other top performing nations; however its graduation rates were only 68% in 2005.¹²

Alberta Adopts a Charter School Initiative

Under the wings of a new government led by Progressive Conservative Premier Ralph Klein, Alberta's atmosphere in the early 1990's was one of reform and cutbacks. Former Education minister Jim Dinning issued a document entitled *Vision for the Nineties* (Alberta Education 1991), which was a culmination of public forums on education reform for the province containing some 60 initiatives which featured the recurring theme of "economic productivity and competition:"

6 Boston Business Journal, (2005) "Schools can learn from Edmonton's teamwork," 23/12/05 Available at http://www.aims.ca/cm_Print.asp?cmPageID=152&typeID=4&id=1274&pg=education.asp

7 Education Week, Vol.24, Issue 20, Page 35.

8 Archer, 2005

9 Archer, Jeff (2005) "An Edmonton Journey," Education Week, Vol.24, Issue 20, p 33.

10 Archer, 2005 p. 35

11 Ibid.

12 Archer, 2005 p. 36, Graduation rates are calculated based upon 5 years after commencement of high school for the province.

“The reforms introduced in Alberta during the 1990s were almost all premised on the assumption that business-management approaches could be applied to public services such as education. This emphasis on business models and customer choice pushed public education in the direction of privatization and increased the prospect that education would become a marketplace commodity.” – Linda Matsumoto, University of Lethbridge, 2001

By 1992, the Alberta government was petitioned by a small faction of disgruntled parents for the creation of a school that would accommodate a specific population; those currently underserved by the mainstream of public and separate catholic schools serving Alberta’s student population of nearly 600,000.¹³ In 2007, there were twelve charter school boards operating 18 schools in three major urban areas; Calgary, Medicine Hat, and Edmonton. The Edmonton school district provides much more choice within its public system (Bosetti, 2001) and as a result has only 2 charter schools. Former Edmonton Public Schools Superintendent Emery Dossdall championed his district’s choice program in a 2001 article stating; “We encourage parents and students to shop around for the school that will best meet their needs. As a result, 41 percent of our elementary students, 48 percent of junior high and 58 percent of high school students attend schools other than their designated school.” In contrast to Edmonton, Alberta’s other main urban center-Calgary- has 6 charter schools in operation today, and the city is home to the most private schools in the province, a direct result of the Calgary Public School District itself having fewer options.¹⁴

Data and Methodology

This analysis is based on a review of available literature and previous research on Alberta charter schools and includes a survey of current school reports, websites and government documents pertaining to charter school regulation and governance. Using the three dimensions of design as recommended in Levin (2002) and Levin & Belfield (2005), the charter school movement in Alberta will be presented using the analytic framework of finance, regulation and information design. Part II will then take the frameworks established in Part I and examine these policies in practice by using four criteria to assess the impact of the charter school movement. These four criteria for assessment are choice, productive efficiency, equity and social cohesion. Finally, Part III of this paper will provide an overview of the regulatory and political constraints facing Alberta charter schools as we look to the future of the movement.

¹³Alberta Learning Website;

<http://www.teachers.ab.ca/Albertas+Education+System/About+Albertas+Education+System/Facts+and+Figures+about+Albertas+Education+System.htm>

¹⁴ Bosetti, Lynn, (2001) “The Alberta Charter School Experience,” University of Calgary.

Part I: Charter School Framework

I. Finance Design

Alberta charter schools receive the same provincial per pupil funding as any other public school in the province. However, start-up costs and capital costs are not covered by the Alberta Government. Charter schools must operate within a balanced budget and are required to submit annual Budget Report Forms and audited financial statements which include all fund raising activities.¹⁵ By law, Alberta's charter schools must be non-profit schools operated by non-profit corporate entities.¹⁶ The local governance of Alberta's charter schools is conducted by its corresponding charter board and the scope of authority includes budget allocation. No charter school may charge tuition, as each school is a publicly funded entity, though schools are entitled to charge instructional or resource fees as they see fit. The practice of charging such fees is also permitted within the regular public/separate/ francophone school system.

Operating costs per pupil ranged from \$4,457 to \$5,600 for the 10 charter schools in operation in 1999¹⁷, and as of 2006/7, per-pupil base-funding expenditures in education averaged \$5,291 per student.¹⁸ Additional funding available to charter schools in 1997-8 included conditional grants for teacher assistants, transportation, special education and programming that were allotted by eligibility.¹⁹ Based on interviews with school administrators, Bosetti et al (2001) estimated that 10-15% of charter school operating budgets was diverted to capital expenditures by charter schools.

II. Regulation Design

15 Charter School Handbook, 2002

16 Charter School Handbook, 2002

17 Bosetti et al (2000)

18 <http://www.teachers.ab.ca/Albertas+Education+System/About+Albertas+Education+System/Facts+and+Figures+about+Albertas+Education+System.ht>

19 Bosetti, L., E. Foulkes, R. O'Reilly, and D. Sande 2000. Canadian Charter Schools at the

Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta. SAEE Research Series #5.

Regulatory reform and deregulation have been a priority of the Alberta government since the 1990's (Alberta Education 2003). With the goals of improved decision-making and a reduction in administrative costs, Alberta education ideology centers on a policy-driven and results-based management system.²⁰ Legislation in 1994 ensured a system of shared responsibility with school boards, schools and school councils and each school in the province that receives funding must demonstrate annual progress on a uniform accountability pillar. Charter school boards are tasked with allocating school budgets, setting policies and adjudicating appeals and have the autonomy to generate their own policies on the programming, support services and types of instruction they offer. Charter boards are held accountable to their local electorate through annual reports and meetings which include parent satisfaction surveys.²¹ According to Levin (1991), the purpose of government regulation of privatized schooling is to ensure that the social benefits of educational experiences are proliferated. Three key means of regulation are considered below; curriculum, personnel and admissions procedures.

A. Curriculum

Alberta Learning unifies school curriculum through standardized testing and core subject requirements, ensuring a common academic base experience for all students, whether they attend charter schools, public schools, francophone schools, separate schools or home schools. Variance occurs in differing pedagogies of instruction and program specialization from school-to-school.

Charter schools may not be affiliated with a religious faith or denomination through sponsorship, but they are entitled to offer religious or patriotic instruction and exercise to their students as optional programming. Such instruction is not required for all enrolled students. This provision is universally applied to all publicly funded schools under section 50 of the *School Act*.²² The difference between public and privately funded schools with regards to religious or patriotic instruction is in the *School Act's* stipulation that public school student participation be voluntary, whereas in the case of private schools, such instruction may be a mandatory component of curriculum. For example, students at Calgary's Almadina Charter School are not required to take any religious instruction although the

20 Alberta Education, (2003). Policy, Forms and Regulations Manual. <http://education.alberta.ca/admin/resources/planning.aspx>

21 Charter School handbook, p.3

22 Charter School Handbook, p.5

school's student body is 95% Muslim.²³ Conversely, The Calgary Islamic School is an example of a private faith-based, religious denomination school. Their students study the Islamic faith and participate in Islamic exercises, which are required components of the school program. Charter schools may not be operated by a religious organization, but they are allowed to be operated by a registered Society. Further regulations that apply to religious instruction may be carried out at the district level. The Calgary Board of Education has its own local policies regarding religious instruction stipulating that schools may provide religious studies, but not religious instruction.²⁴

Required Achievement Results Reporting

By design, Alberta's Charter schools are expected to demonstrate innovation that will improve student learning by providing a different educational environment beyond the services provided by the existing public system through the sharing of best practices. (Charter School Handbook, p.5) In order to facilitate innovation, the governing charter boards that operate these schools have been granted the flexibility and autonomy to carry out different instruction and pedagogical methods. The policy approach to accountability in education is mechanized in Alberta through monitoring Annual Education Results Reports (AERR)'s. All charters are expected to demonstrate enhanced student learning through these reports, and each school must publicize information on school philosophy, curriculum/ teaching methodologies, standardized test scores graduation rates and in some instances, college attendance.²⁵ As stipulated in provincial policy, AERR results must be available on the school's individual website. Stakeholders are to be included in the development of the charter school's planning process such as the three-year education plan, and evidence of school council input is to be noted in the school's AERR.²⁶ A comparison of the AERR reporting requirements by district revealed identical standards between public and charter school systems with two additional outcome requirements for charter schools (See Table 2).

²³ Almadina [School Policies & Handbooks: www.esl-almadina.com](http://www.esl-almadina.com)

²⁴ Joe Frank Education Manager, Special Programs, Alberta Education, April 7, 2008

²⁵ Depending on individual school charter goals, college attendance may or may not be a priority that is reported on

²⁶ Section 2-Education Plans for Charter Schools Alberta Education Page 2-7 Available at:

<http://education.alberta.ca/media/441527/CharterSchGuide2007.pdf>

Table 2
Accountability Requirements for All School Education Plans
2007/08 – 2009/10

*Source: Guide for Alberta Charter and Regular School Education Planning and Results Reporting
<http://education.alberta.ca/media/441527/CharterSchGuide2007.pdf>

Outcome	Charter Schools	Public/ Separate/ Francophone Schools
Children at risk have their needs addressed through effective programs and supports.	Same Criteria	Same Criteria
The education system meets the needs of all K-12 students, society and the economy.	Same Criteria	Same Criteria
Schools provide a safe and caring environment for students.	Same Criteria	Same Criteria
Children at risk have their needs addressed through effective programs and supports.	Percentages of teachers, parents and students who agree that programs for children at risk are easy to access and timely (K-9 schools).	N/A
Students demonstrate high standards.	Same Criteria	Same Criteria
Students are well prepared for lifelong learning.	• Percentages of teachers and parents satisfied that high school graduates demonstrate the knowledge and skills for lifelong learning.	N/A
Students are well prepared for employment.	Same Criteria	Same Criteria
Students model the characteristics of active citizenship.	Same Criteria	Same Criteria
The jurisdiction demonstrates effective working relationships with partners and stakeholders.	Same Criteria	Same Criteria
The jurisdiction demonstrates leadership and continuous improvement.	Same Criteria	Same Criteria

Alberta Education evaluates the performance of all Alberta school jurisdictions on a common set of indicators using Provincial Achievement Test (PAT) results. Schools are evaluated on the basis of achievement (the school result compared a provincial standard) and by the degree of improvement over past performance.²⁷ Charter schools, like all other schools in the province’s regular system must provide strategies for achieving the provincial goals of high quality learning opportunities and excellence in student outcomes as measured by annual drop out rates, high school completion rates,

²⁷ Alberta Learning, <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

and percentages of students who complete and achieve the acceptable standard/standard of excellence on provincial achievement tests.²⁸

B. Personnel

Charter boards make all decisions regarding class size and staffing levels at their schools.²⁹ Of the 12 charters in operation in Alberta at the time of this publication, none were affiliated with the Alberta Teacher's Association (ATA) directly. Alberta Learning requires basic certification standards for charter school teachers and these standards also apply to the schools in the regular systems. Neither charter school teachers nor principals can be active members of the ATA because of a stipulation in the *Teaching Profession Act* that membership applies only to local school boards. In some cases, a charter board may second a teacher on leave from a local school board, in which case the teacher remains an employee of the original school board and an active member of the ATA.³⁰

C. Admissions Regulations

According to the Alberta Education official Charter School Handbook, Charter schools cannot deny access, if sufficient space and resources exist, to any students who meet the requirements of the right of access to education for all children as outlined in Section 8 of the *Alberta School Act*.³¹ However, Section 36(1) (d) of the *School Act* states that charter boards are exempt from providing special education programming.³² Further clarification on admissions obligations are outlined in a June 2007 publication released by Alberta Education entitled; "Accommodating Students with Exceptional Needs in Charter Schools," where the document states; "Charter school boards are not obligated to enroll every student who seeks admission," rather, charter boards are advised to make enrollment decisions "on an individual basis, based on the best interests of a student's educational needs, and , ideally, in consultation with a student's parent(s)."³³

28 Alberta Learning, <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

29 Charter School Handbook, 2002

30 Charter School Handbook, 2002

31 Charter School Handbook, 2002

32 Alberta School Act: <http://www.fmpsd.ab.ca/FMPSD%20K1/School%20Board/Policies/HTMLpolicyHB/schlact-2002.htm>

33 Alberta Education, "Accommodating Students with Exceptional Needs in Charter Schools." June 2007 p.1

Lottery Approach

By definition, the Alberta Charter School Handbook states; “If student enrolment exceeds the capacity of the program, the school will select students in accordance with a selection process established by the charter board.”³⁴ The selection process outlined in the handbook allows charters to include geographic attendance zones, sibling priority and waitlist order, and mandates; “The selection process must be open and fair.”

III. Support Services

The means by which the charter school movement adds to the effectiveness of the market for schools in Alberta is determined by the quality and degree of support services made available to the families of students (Belfield and Levin, 2005). Support services for the purpose of this analysis include information, transportation, special needs programming and adjudication procedures.

A. Information Design

According to Appendix A of the Charter School Handbook, providing information to the general public is a requirement. The Handbook encourages charter applicants to notify and educate the public of the following: 1) The school’s purpose and philosophy 2) educational services provided, 3) school operation, 4) expected student codes of conduct, 5) student supplies, fees and costs, 6) school administration and governance and 7) any other pertinent information.³⁵ Bosetti et al in their 1999 survey of 10 Alberta Charter schools found the typical methods of information dissemination to include newspaper advertisements, public announcements, information meetings and the distribution of posters and pamphlets in public locations such as libraries and community centers. A primary reliance on referrals from other social agencies and the grassroots networking of parents were also listed as main sources of recruitment for the charter schools.³⁶ “Marketing of most charter schools is limited to public information meetings advertised in local newspapers and through word-of-mouth. Consequently, most parents who are attracted to charter schools are informed parents who are aware of

34 Alberta Charter School Handbook, 2002 p. 3

35 Charter School Handbook, 2002 Appendix A

36 Bosetti, L., E. Foulkes, R. O’Reilly, and D. Sande 2000. Canadian Charter Schools at the Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta. SAEER Research Series #5.

the choices available within public education, or who have personal connections with the board, teachers on staff or other parents who have children attending the school.” (Bosetti, 1998 p.65)

As a part of the initiative to inform the public of charter school progress and demonstrate accountability, Alberta Education mandates all charter schools outline a communication plan for dissemination of achievement results through Annual Education Results Reports (AERR). A general public information action plan must also be included by all charter schools in order to enable the sharing of effective practices and innovative approaches for the benefit of Alberta’s education system as a whole.³⁷ Typical strategies employed by schools are outlined in table 3 below.

ABC/Westmount	Almadina	Aurora	Boyle Street Coop
-newsletter -school website -local print media -info brochures to educational psychologists and pediatricians -career fair at University of Calgary	-monthly newsletters -school website -school tours -attendance at annual charter school conference -promotion of school at other conferences by principal	-brochures -newsletters -website -engage university partnerships -welcome researchers -foster relationships with local stakeholders	-school website -tours -school documentary -participation in research
Calgary Arts Academy	Calgary Girls	CAPE	Foundations for the Future
-School Website	-Website -brochure designed to share key messages about the school -Newsletters sent to all households in community -newspaper articles on the school	-Website, brochure, information pamphlet -Extensive Mailing list _Annual Open House -Semi-Annual information sessions -Achievement published in local paper -All CAPE events publicized and open to community - Students act as CAPE ambassadors	-CBC Radio Interviews -Website -Visits from University of Calgary -School staff participate in provincial initiatives -School provides expertise to Calgary Board of Education

37 Section 2-Education Plans for Charter Schools Alberta Education Page 2-7<http://education.alberta.ca/media/441527/CharterSchGuide2007.pdf>

Mother Earth	New Horizons	Calgary Science	Suzuki
-further enhancing home/school contact -monthly newsletter*	-School newsletter -School website -School Bulletin Board -Open Houses -"Mall Wide - Registration" -Promotional Materials -Advertising (press) -Chamber of Commerce Member -Trade Fair	-monthly newsletter -website	-Open door policy to welcome visitors from the local media, musicians and education researchers. -News Articles -Bulletin -outdoor school sign -Staff, student, and parent handbooks -Website -Student performances across city -Hired marketing committee - Radio coverage

Source: All plans taken from individual school 2006 Annual Achievement Results Reports and/or Three Year Plans, available on individual school websites.

* Mother Earth's communication plan is geared towards fostering better communication between the school and parents. No formally written communication plan element is geared toward garnering new students or informing the public specifically.

B. Transportation Design

Effective transportation planning to facilitate choice and enrollment in Alberta Charter schools is a crucial component of a successful program design (Levin and Belfield, 2005). Within Alberta, current transportation responsibility lies with the local school boards but is funded by the Alberta government on a per-student funding formula. Students who are enrolled within a school board's attendance area and who live more than 2.4 kilometers away from their respective school are entitled to transportation.³⁸ Some boards set fees to compensate additional transportation costs depending on the situation, although extra accommodations are often made to transport students to special programs.³⁹ The four largest urban school jurisdictions in the province receive basic block funding support.⁴⁰ The case of transportation for charter schools is an exception to the norm governing public/separate and francophone school districts. Section 51 of the *School Act* does not apply to charter boards thereby exempting them from the requirement to provide transportation to their students. Like local public boards, charter boards are entitled to charge a fee for transportation. The Charter Handbook states; "parents should be told whether the charter board has made arrangements for

³⁸ <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

³⁹ Alberta Learning, <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

⁴⁰ Alberta Education Planning Branch, 2007

transportation.”⁴¹ Regular school boards are required to provide transportation for severely disabled students to designated special needs programs in their areas. Special needs transportation does not apply to charter boards, as they are exempt from the general transportation requirement.

C. Special Needs Programming

Beginning in September of 1999, Alberta Learning expanded its commitment to students of special needs by offering private operators funding equal to public schools for students with mild, moderate or severe disabilities. This commitment effectively extended the scope of choice for parents of special needs students into the private sector.⁴² However, by exemption granted under Section 36(1)(d) of the *School Act*, charter schools are still exempt from the obligation to provide programs and services to special needs students.⁴³

D. Adjudication Design

Oversight of Alberta’s charter schools is administered through Alberta Learning by an appointed charter school team that spends a combined amount equaling one full-time position at the ministry level.⁴⁴ Students of charter schools or their parents may ask the Minister to review any charter board decision regarding issues such as expulsion or the amount and payment of fees or costs (section 124 of the *School Act*).⁴⁵ Because Alberta Education allows special needs provision exemptions to Charter Boards by statute, a charter school is entitled to deny enrollment of a student. However, Section 14 of the *Charter Schools Regulation* allows for a review by the Minister if a student has been denied access to a charter school, and charter schools are required to inform parents of this right. (Alberta Education, 2007 p.11). Administrative appeals such as the forced resignation of a charter board member may also be reviewed by the Minister. (Alberta Charter School Handbook, 2002)

Part II

Evaluation: Consequences of Regulation

⁴¹ Charter School Handbook, 2002 p.13

⁴² <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

⁴³ Alberta Learning, 2007. “Accommodating Students with Exceptional Needs in Charter Schools,” p.1

⁴⁴ Bosetti, 2001

⁴⁵ <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

By examining the dimensions of choice, productive efficiency, equity and social cohesion as they are impacted by Alberta’s charter school policies, we can uncover how the consequences of regulation and governance affect the charter school landscape in Alberta. The degree and nature of regulations should reflect the criteria that are most valued by the province of Alberta. According to the Alberta Charter School Handbook, accountability and regulation of charter schools is mainly housed at the individual school level by charter thereby minimizing provincial level control. However, evidence of strong regulation and curriculum standards by the provincial government suggests otherwise. Through an analysis of support services and information about these services, we can see which areas are prioritized in practice. A closer look at the “selective” open enrollment process will also reveal more about Alberta charter school policy than is evident through examination of the regulations alone. Taken together, these policies and subsequent practices illuminate the priorities of social cohesion and productive efficiency over choice and equity for Alberta’s charter schools.

1. Choice Dimension

“Rather than weakening public education, charter schools have actually strengthened the public and Catholic systems... The success of charter schools has encouraged a culture of choice in most school jurisdictions in the province.”

- Former Alberta Education Minister Ron Liepert Nov 4, 2007

“Alberta’s charter school movement has not built the critical mass necessary to create widespread choice and competition among schools or to lead to major changes in the public education system.”

- Lynn Bosetti, University of Calgary, 2001

“Responding to these groups has forced us to do business differently. One group wanted a dance program, so we built a dance studio in one of our schools. We said “yes” to an all-girls junior high program we named after an early Albertan suffragette and politician, Nellie McClung. We now have three Nellie locations.”

- Former Edmonton Public Schools Superintendent Emery Dosedall, 2001

The Alberta *School Act* contains five fundamental components which include equity and flexibility and choice. The flexibility and choice component guarantees parents and students the opportunities to choose schools and programs that meet provincial standards within the public education system.⁴⁶ Alberta’s charter schools have taken a ‘magnet school’ approach, where charters

⁴⁶ Alberta Learning, <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

provide different ‘magnets’ to different populations of students within the broader communities. Charter schools were introduced in Alberta as a means to specialize in a particular educational service or approach in order to address the needs of a particular group of students. (Charter School Handbook, 2002) According to Levin (1991), parental values reflected in choice may include varying degrees of academic, cultural, social, political, ethnic, racial and religious variation between programs and/or schools. In order to evaluate choice, this section will examine the level of responsiveness to the private concerns of the community by charter schools in operation in Alberta.

Evidence of Innovation

The Charter School Handbooks states; “A charter school will provide enhanced or innovative delivery of public education to students.” (Alberta Charter School Handbook, 2002) However, high levels of regulation will limit any market-based system’s diversity, and so the degree of regulation in Alberta is what inhibits and/or enables the mechanism of “choice” to exist through diversity. For example, Alberta’s mandated provincial curriculum standards narrow the scope of “choice,” and these limits are often considered restrictive by parents who desire choice in education.⁴⁷ According to Bosetti et al, “Few of these charter schools could be viewed as offering truly innovative programs.” and the University of Calgary researcher attributes some evidence of innovation in charter schools to “novel approaches” in combinations of programming and the degree to which charter schools cater to populations underserved by the public system.⁴⁸

Charter schools are not allowed to be affiliated with a religious faith or denomination but schools may still offer religious instruction. Subtle forms of diversity through instruction and programmatic undertones exist among Alberta’s charter schools. For example, Boyle Street and Mother Earth Charter schools have deep elements of spirituality incorporated throughout their charter goals and practices which are geared towards the well-being and self-awareness of their largely Native at-risk student bodies. Almadina Language Academy is now a magnet school for new immigrants and has a 95% Muslim population, where parental values are evidenced in the school’s practice of conservative values such as conduct, dress and discipline.⁴⁹ Suzuki Charter School exclusively

47 Goddard, Tim. (2000) “The Flight of the Middle Class from Public Schools: A Canadian Mirage,” Canadian Journal of Educational Administration and Policy, Issue #18, <http://www.umanitoba.ca/publications/cjeap/articles/goddard.html>

48 Bosetti et al, 2001 p.127

49 Almadina [School Policies & Handbooks: www.esl-almadina.com](http://www.esl-almadina.com)

practices the Suzuki method of instruction and all students are required to study and play music. A general overview of Alberta's thirteen charter school boards in operation in 2007 is available in *Appendix A- Charter School Profile Table*. Further evidence of innovation is assessed in the social cohesion section of this analysis.

Satisfaction Results

All schools (public, separate, francophone and charter) must provide results of student, parent, teacher and board satisfaction surveys in their Annual Education Results Reports (AERR's). The provincial accountability pillar Education Goal #1 states High Quality Learning Opportunities for all should be achieved across the province. The second outcome of this provincial goal states; "The education system meets the needs of all K-12 students, society and the economy," and all charter schools reported their results of parent, student and teacher satisfaction surveys in 2006. (See table 4)

⁵⁰ In comparison to the province as a whole, results on satisfaction with regards to variety in programming and overall quality of education favor charter schools in 2006/07. Almadina and Boyle Street (two schools that serve ESL and at-risk youth) report programming diversity satisfaction to be below the provincial results.

Bosetti et al found parent satisfaction with their children's education was generally positive, with 82% of parents intending to keep their children enrolled in charter schools for as long as possible. Key factors of success cited by parents included improved performance of their children, and improved child self-confidence. Overall, parents they felt that their children's charter school was better than the previous schools in which their children were enrolled.⁵¹

⁵⁰ Alberta Learning Accountability Framework

⁵¹ Bosetti et al, 2000 p.164

Table 4 Parent/ Student/ Teacher Satisfaction Results		
ALBERTA EDUCATION GOAL 1: High Quality Learning Opportunities for all		
Outcome 2: The education system meets the needs of all K-12 students, society and the economy.		
Question #1: Percentage of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology and health and physical education.		
Question #2: Percentage of teachers, parents and students satisfied with the overall quality of basic education.		
	#1. Broad Programming	#2. Quality of Education
Province[^]	78.5	87.6
ABC Charter School (Westmount)	82.6*	92
Almadina	66.7	83
Aurora	82.5	95.6
Boyle Street Coop**	75	92.6
Calgary Science	95	82.5
Calgary Girls	84	95.8
Calgary Arts Academy Society	82.6	88.6
Centre for Academic and Personal Excellence (CAPE)	73.8	85.5
Foundations for the Future *(2003/04)	96	98
Mother Earth	81	82
New Horizons	76	92
Suzuki	89	97

Source: Individual School AERR reports

* Shaded areas represent schools reporting satisfaction above the provincial level

** Boyle results were based on student satisfaction only (most parents are not involved with the school)

[^] Provincial results are available in each AERR, although the numbers vary slightly. These figures were taken from Alberta Education

Regulations Limit Choice

Expansion of choice is limited and controlled by the provincial government's charter school application, renewal and reporting processes (Goddard, 2000). With a limit of 15 charters approved by the minister at any one time, and a hostile reception from the only other sponsoring organization- local school boards- the number of charter boards has remained steady at 10-13 boards with a current high of 18 schools in operation across the province.⁵² Referring back to Table 1, the current 2007 market

⁵² At the time of this research, 13 charters were reported to be in operation in the Province according to Alberta Education, although since then, only 12 charter boards are reportedly in operation as of May 2008.

share of charter schools in Alberta sits at 1.1%, up from a meager 0.37% of the educational market ten years ago in 1997/98. Current charter school student enrolment is at 6,634 students of the provincial total of 596,677 students in 2007.

By many accounts (namely the Alberta Teachers Union and local public school boards), choice is thought to be well established in Alberta through existing programming and open boundary policies. Therefore a limited willingness of local boards to sponsor or renew charters exists in the province (ATA, 2003; Alberta Learning, 2007; Bosetti et al, 2001). Establishing a charter school is by itself a lengthy process that includes a demonstration by the individual or group that the program being requested is not offered by the local school board and evidence the board is not willing to consider alternative program status. (Charter School Handbook, 2002) In addition, the charter board must provide significant evidence of community support for their school, evidence on the effectiveness of the method the board proposes to offer at its school in enhancing student achievement relative to other schools, and finally, evidence that the program will indeed be a means to provide choice to its community. As a result, charter school growth in the past ten years is not attributable to an increase in the number of approved charters- rather it is a result of steady individual school intake increases over the past ten years, and the opening up of additional campuses by existing charters (Almadina and Foundations for the Future).

The Association of Independent Schools and Colleges in Alberta warns the "structural preference" by government to cap charter schools at 15 ultimately impedes the potential choices available to parents.⁵³ In a recent press conference on charter school success, former Alberta Education Minister Ron Liepart attributed Alberta's ranking in academic achievement as "among the best in the world" to Alberta's "competitive environment for education" as created in part by introducing charter schools. He then clarified the purpose and future role of charter schools in the province as a demonstration project; "Because of their stellar performance, we are continually looking at ways of adapting the charter school experience to the larger educational community."⁵⁴ Mr. Liepart made no mention of expanding the movement, although he went on to clarify that "charter schools are here to stay...but they are never to become schools of choice for parents who do not want their children to attend the public school system. That position conflicts with the fundamental concepts behind the

⁵³ <http://www.aisca.ab.ca/03-02news.htm>

⁵⁴ November 4th Speech from the Minister of Education, Calgary Alberta

creation of charter schools.” The Alberta Learning Commission in 2006 released a set of recommendations to the government concerning education issues stating current limits on the number of charter schools and the length of their terms should remain in place. However, Alberta Education publicly stated it did not support the recommendation and issued the following statement; “Choice is one of the strengths of our learning system. If the limit of 15 is reached, government wants to retain the option to review and decide if an expansion beyond the current limit is appropriate.”(Alberta Learning Commission, 2007) At the time of this writing, no new legislation has surfaced supporting this statement.

Effective Competition

Allowing parents the ability to make key decisions about how their children are schooled is a key component to the choice dimension. The effectiveness of open enrollment as a stimulant to competition is subject to availability of transportation and information to parents.⁵⁵ By the province’s own handbook, a charter school is designed to meet the needs of a specific group of students, and not every student in Alberta. (Charter School Handbook, 2002) For example, Section 47 (Special education program) of the *School Act* does not apply to charter schools, leaving the responsibility of special needs to local school boards.⁵⁶ As outlined in the transportation and information evaluations below, shortcomings in support service and information areas effectively limit parents’ abilities to exercise choice and make informed decisions.

Information Validation

According to the Alberta Learning Performance Measurement and Reporting Branch, nearly half of parents, public and board members feel that Alberta’s education system communicates effectively with the public. However, less than half of the public were satisfied with access to information about how money is spent in schools in their community.⁵⁷ To measure effectiveness of communication for this analysis, all school websites were examined individually, and easily accessible

⁵⁵ Levin, 1991

⁵⁶ <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

⁵⁷ Alberta Education, Performance Measurement and Reporting Branch. Satisfaction with education in Alberta survey, 2006/2007: summary report.

supporting documents such as parent handbooks were reviewed for the following categories of information: special needs programming, registration/ admission information, fee information, transportation schedules and fees, achievement reporting and languages of advertising. Table 5 paints a picture of the current comprehensiveness of information available to parents in Alberta along these key equity issue areas. Shaded areas on the graph represent either partial or incomplete information.

Table 5 Charter School Public Information Summary							
	Website	Languages	Special Needs Info	Achievement Info	Fee Info	Admission Info	Transportation Info
(ABC) Westmount	Y	English	Y	Y	Y**	Y	Y
Almadina	Y	English Arabic	Y	Y	Y	Y	Y
Aurora	Y	English	Y	Y	N*	Y	Y
Boyle Street	Y		Y	Y	Y	Y	Y
Calgary Arts	Y	English	N	Y	N	Y	Y
CalgaryGirls	Y	English	N	Y	Y	Y	Y
CAPE	Y	English	Y	Y	Y	Y	Y
Foundations for the Future	Y	English	N	Y	Y	Y	Y
Mother Earth	Y	English	N	Y	N	Y	N
New Horizons	Y	English	N	Y	Y	Y	N
Calgary Science	Y	English	N	Y	Y	Y	Y
Suzuki	Y	English	N	Y	Y	Y	N

* Shaded Areas + N = No Info at all

** Shaded Area + Y = Partial Info (Usually the fee amount was missing)

Note: If any area of information was embedded within the school's AERR's and 3-year education plans it was not included in Table 5 as easily accessible information, and therefore received a negative rating for this portion of the analysis.

In summary, most weaknesses lie in reporting the details of instructional and/or transportation fee amounts. Special needs programming information is also largely absent on school websites. Of the twelve charter schools in operation, only four specifically state they do not have special needs programming on their websites or AERR's, and eight schools have no readily-accessible information.⁵⁸ (See Appendix A for more information on special needs programming by school) Finally, only one school (Almadina) advertises in more than one language, and although the province

⁵⁸ If any area of information was embedded within the school's AERR's and 3-year education plans it was not included in Table 5 as easily accessible information, and therefore received a negative rating for this portion of the analysis.

is an English speaking majority, several parents are not native English speakers. (See Appendix B for a profile of parental language abilities)

Comparative Information for Parents

Market theory stipulates that substantial information of pertinence to consumers be available in order for parents to make informed decisions about which schools they will choose for their children. The availability of comparative information across charter schools is therefore a key enabler of competition in the school marketplace that will eventually lead to improved schools (Levin, 2001). The Alberta Charter school case leaves much to be desired in this respect. The Alberta Learning website provides minimal tools to parents about individual schools, where school website addresses and contact information is the only form of information available about individual charter schools provided by the government. Comparative information on schools is not formally available through the government of Alberta, although some information is provided by interest groups both in favor of and against school choice. Advocates such as the Fraser Institute in Calgary and the Association of Independent Schools and Colleges in Alberta publish articles and reports of market-based solutions such as the Fraser Institute's annual "Alberta Report Card." Strong opposition to the movement is voiced through the Alberta Teacher's Union through their official stance against privatization.⁵⁹

Choice: The Ripple Effect

The inability of the charter school movement in itself to add a significant amount of choice to parents in Alberta is not entirely a failure (Bosetti, 2001), and the presence of charter schools has actually acted to spawn awareness of the need for more options, encouraging parents to demand more responsive programs for their children from their school districts. In essence, the effect of the charter school movement has been to generate competition from the public/ separate system through increased diversity of program offerings. (Bosetti, 2001 and Hepburn and Van Belle, 2003) Notably, the Edmonton School District has responded to the charter school movement through its own choice initiative:

"We offer 29 different programs of choice at Edmonton Public Schools, and we've found they enable us to serve the diverse needs of children in our community. Although our city's population has remained relatively stable, our enrollment continues to grow. Students are attracted to our programs from across

⁵⁹ See their website at <http://www.teachers.ab.ca>

the province, and this past year we attracted more than 220 international students--most of them from Korea, Hong Kong and China--who pay \$9,000 in tuition per year to attend.”

- Former Edmonton Public Schools Superintendent Emery Dossall, 2001

2. Productive Efficiency Dimension

Productive efficiency is a one-dimensional issue in Alberta at present and lacks a cost-component. Appropriate value-added assessments of Alberta Charter school student performance is lacking or undeveloped at this time (Bosetti, 2001 and da Costa 2002) and opportunities to examine individual effects such as class size or instruction methods on student outcomes and the cost-benefit of charter schools in comparison to the regular public and separate alternatives have yet to be explored.

The Cost Component

Given that funding is public and equal on a per-pupil basis between charter and regular public system schools, it may be fair to compare student achievement between charter and other students in the province as a measure of productive efficiency. The fact that charter schools are struggling with capital expenditures suggests per-pupil expenditures are even lower than the province as a whole. Based on interviews with school administrators, Bosetti et al (2001) estimated that 10-15% of charter school operating budgets was diverted to capital expenditures as the provincial government was not covering overhead costs. However, issues of selection bias and a lack of robust techniques such as randomized field trials or even individual student data (all schools report at an aggregate level) limit comparisons.

Achievement Results 1996-1999

Bosetti et al examine samples of student test scores on provincial achievement tests (PAT's) from 1996-1999, and compare the sample score to the expected provincial rates of achievement by proportion. The analysis has its limitations due to a short time frame and limited sample sizes but provides some insight into preliminary results. Bosetti et al measure the proportion of each sample scoring at the Acceptable Standard (AS) and Standard of Excellence (SE) in grade 3 Language Arts and Mathematics and grades 6 and 9 Language Arts, Mathematics, Science and Social Studies, and achievement findings are generally consistent with provincial results. Longitudinal evidence has

demonstrated both improvements and declines in student performance since the charter school movement was initiated. At the time of the survey (1999) only two charter schools had student cohorts that had completed PAT's at two grade levels. Bosetti et al compared the proportions of charter students achieving at AS and SE over time to provincial and district scores for this analysis. Findings indicated improvements over time for the two cohorts were "more noticeable than the changes that were shown by students in either the district or province-wide."(Bosetti et al, 2000 p.142)

Selection Bias

In the cases where the charter school serves either special needs students or gifted students, Bosetti et al find their samples to be achieving at below and above provincial levels respectively, which is a clear indication that population being served has an impact on test scores and the findings come with no surprise.⁶⁰ Bosetti et al point out there is no account for student socio-economic status, ability, language proficiency, or teacher characteristics in their results. (Bosetti et al, 2000 p.140) Almadina Charter School has suffered lower achievement rates compared to other Alberta charter and public schools for reasons that are rooted in poor administration, high turnover and charter ideology (Bosetti, 2001 and 2005). The Boyle Street Co-op Education Center was established as a program to cater to the needs of troubled street youth who had "little chance of making it in a traditional school system." (Bosetti, 1995 p. 12) Few of these students are at the knowledge or skill levels to be compared with regular charter and public school students from across Alberta on standardized test scores. Conversely, schools with students who have been admitted based on test scores and interviews will be positively biased in their achievement results.

Achievement Results 1997-2001

In a study of achievement of 10 charter schools between 1997 and 2001, da Costa et al found three charter schools (Table 6, highlighted) met or exceeded the provincial Acceptable Standards (AS) in all subject areas. (daCosta et al, 2002 p.108). Of the remaining 8 schools, five schools met or exceeded the provincial AS in two-thirds of the tested areas. Important to note here, is that of the three top performing schools, two (New Horizons and ABC- Westmount) employ rigorous screening

⁶⁰ For more results see Bosetti, L., E. Foulkes, R. O'Reilly, and D. Sande 2000. *Canadian Charter Schools at the Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta.* (pp.136-155)

procedures in their admissions process (refer to Appendix A for more information). The third top performing school- Calgary Science has results for the sixth grade only, and the sample size was 42 and 48 students in LA and Math.⁶¹ As for the province’s lowest performing charter school- Almadina Charter, negative results should equally be interpreted with caution: Almadina also consists of a population of challenged students, with only 10% of mothers and 3% of fathers speaking English as a first language(See Appendix B: Charter School Student/ Family SES Profiles).

Table 6
Academic Achievement Comparison:
Alberta’s Charter Schools and the Province as a Whole, 1997- 2001
*Schools performing above (+), on par (=) and below (-) the province as a whole on average across 1997-2001

	Grade 3 LA	Grade 3 Math	Grade 6 LA	Grade 6 Math	Grade 9 LA	Grade 9Math
ABC/ Westmount	+*	+	+	+	N/A	N/A
Almadina	-	-	-	-	-	-
Aurora	+	-/=/+	+	+	=/ +	+
Boyle Street Coop						
CAPE	=/+	-/=	=	-/=	+	=
Foundations for the Future	=	=	=	=	+	+
New Horizons	+	+	+	+	+	+
Suzuki	=	=/+	=	=	N/A	N/A
Moberly Hall	+	-/+	=	=/-	=	N/A
Calgary Science			+	+		

Source: Da Costa, J., Peters, F., and Violato, C. (2002), “Achievement in Alberta’s Charter Schools: A Longitudinal Study,” Society for the Advancement of Excellence in Education, SAEE Research Series #13, Kelowna, B.C.

For their value-added analyses of charter school student achievement by cohort, da Costa et al were only able to employ *aggregate data by school* with no guarantee that the actual cohorts consisted of the same students pre and post-test. Da Costa et al’s findings overall favored charter school effect size relative to the province as a whole for grades 3-6 “cohorts” within the 10 surveyed charter schools. Of the 180 comparisons of effect size that were drawn for the analysis, 60% suggested medium or large positive effect size using the Cohen’s *d* method. Again, the results were without verification of actual cohorts of students, sample sizes were very small (n<30), and there is absolutely no account for

⁶¹ Da Costa, J., Peters, F., and Violato, C. (2002), “Achievement in Alberta’s Charter Schools: A Longitudinal Study,” Society for the Advancement of Excellence in Education, SAEE Research Series #13, Kelowna, B.C. (P. 97)

selection bias or other factors of achievement in the analysis.⁶² For these reasons, value-added “cohort” results are not presented in Table 6.

Achievement Results: 2006/07

All schools by regulation must self-report provincial achievement in their AERR’s. Table 7 summarizes available data on provincial math and language arts results. Results are reported as follows: The first number is percentage of students achieving Acceptable Standards (AS) and the second number represents the number of students achieving Standards of Excellence (SE). Shaded regions represent achievement above the province as a whole. Based on the 2006/07 results shown in Table 7, the majority of charter schools are performing at levels that are above the province as a whole in both categories of acceptable standards and standards of excellence. These findings are problematic for reasons of selection bias mentioned above, and should be read with caution.

Table 7 Self-Reported Provincial Achievement Test (PAT) Results 2006/07 <i>Results Listed as % of Students Receiving Acceptable Standard & % Receiving Standard of Excellence (AS/SE)</i>						
	Grade 3 LA	Grade 3 Math	Grade 6 LA	Grade 6 Math	Grade 9 LA	Grade 9 Math
Province**	80.3/17.7 AS/SE	79.4/23.3	80.3/19.8	73.3/14.4	77.5/14.8	65.2/17.8
ABC Charter School* (Westmount)	N/A	N/A	N/A	N/A	N/A	N/A
Almadina	89.9/15.6	90.2/30.1	87.6/17.7	82.7/17.7	88.2/15.5	76.5/19.5
Aurora	97.8/28.9	100/26.7	100/47.7	95.5/31.8	95.3/25.6	93.0/37.2
Boyle Street	N/A	N/A	N/A	N/A	N/A	N/A
Calgary Science	N/A	N/A	99/52	100/48	99/50	98/53
Calgary Girls	N/A	N/A	100/43.8	94.7/20.2	100/45.6	96.7/28.9
Calgary Arts Academy	83.9/12.9	93.5/32/3	87.5/8.3	56.3/0	88.5/11.5	53.8/15.4
CAPE	100/ 13.3	93.3/20	82.6/26.1	87/21.7	N/A	N/A
Foundations for the Future (2003/04)	90/30	92/35	92/23	88/20	?/19	?/20
Mother Earth	N/A	N/A	N/A	N/A	N/A	N/A
New Horizons	100/17	100/50	100/60	100/50	100/42	92/58
Suzuki	100/70.6	100/82.4	100/58.8	100/52.9	N/A	N/A

* Source: Charter School results were taken from Individual 2006/07 AERR’s available on school websites

**Results Based on Number Enrolled, English Language Test Results Source:

http://www.education.gov.ab.ca/k_12/testing/provincialresults/achievement/table.pdf

⁶² Da Costa, J., Peters, F., and Violato, C. (2002), “Achievement in Alberta’s Charter Schools: A Longitudinal Study,” Society for the Advancement of Excellence in Education, SAEE Research Series #13, Kelowna, B.C. (P. 133)

Interest Group Reporting

The Fraser Institute is an independent Canadian economic, social and educational research organization dedicated to championing the role of the market in providing for social well-being.⁶³ Assisted by an Editorial Advisory Board of internationally renowned economists, The Fraser Institute has undertaken recent initiatives such as annual report cards of elementary and secondary school performance in Alberta. Since 1998, the institute’s Report Card on Alberta’s Elementary and Secondary Schools has been designed to “help parents choose” and to “facilitate improvement” of schools. A single rating out of 10 (with 1 being the lowest score) was developed that would encompass several elements of a school’s academic performance and assist parents in their decisions. All schools (be they public, private, separate, francophone or charter schools) are ordered by their scores and ranked against all schools in the province in the Fraser Institute Report Card. Charter School results for 2003/04 and 2005/06 as reported by the Fraser Institute are outlined in Table 8. Of the 8 charter schools reported on in the Fraser Institute Report Card, four schools (Westmount, Foundation for the Future, Suzuki and Calgary Arts) were ranked in the top 100 of 705 ranked schools in 2005/06, with Aurora ranking close behind at 111th place. Three of these top four schools employ screening procedures. The two charter schools serving special needs populations (Almadina and Mother Earth) were ranked near the bottom by the Fraser Institute in 2003/04 and 2005/06.

Table 8 Fraser Institute Report Card on Alberta Charter Schools 2004-2006		
School	School Ranking 2003/04	School Ranking 2005/06
Westmount	27/748	42/ 705 (Elementary) 98/ 276 (High School)
Foundation for the Future Academy	126/748	77/705 (Elementary) 111/ 276 (High School)
Mother Earth’s Children’s Charter School	744/748	No Info
CAPE	593/748	No Info
Calgary Arts Academy	249/748	99/705
Almadina	614/748	606/705
Aurora	126/748	111/705
Suzuki School		1/705

Source: Fraser Institute’s 2005 and 2007 Report Cards on Alberta’s Schools

⁶³ www.fraserinstitute.ca.

Productive Efficiency Reporting Requirements: Help or Hindrance?

The reporting requirements placed on charter schools has enabled information on school-level data on achievement, provincial/ charter goals and outcomes, enrollment, and financial accountability to be made available to the public. However, information reporting is laborious, and charter requirements are above and beyond what is expected of public schools according to Bosetti et al (2000). Because charter schools are judged by their charters as well as their three-year education plans, time and resources are spent duplicating efforts, where they could be better used elsewhere. In addition, charter schools are mandated to demonstrate “improved student learning” yet Bosetti et al claim a clear definition of what should constitute “student learning” or “improvement” is not defined by Alberta Learning.(Bosetti et al, 2000 p.165)

3. Equity Dimension

At the cost of productive efficiency in instruction (Levin, 2000) is the degree of availability of support services that facilitate competition and access in the marketplace. In October 1994, 26 representatives from The Association for Supervision and Curriculum Development (ASCD) visited Calgary, Alberta to confer with representatives from a wide variety of educational interest groups from the province of Alberta. One of the key issues that emerged from the conference was equity:

“The topic of equity was not widely debated by Albertans until recently. However, changes in demographics, economic conditions, and legislation prompted intense discussions of equal access to adequate school programs. In these discussions it was difficult to separate clearly the influences of immigration patterns and other demographic variables. Nevertheless, differences between rural and urban schools, access to early childhood services, and socioeconomic variables emerged as significant issues in the current equity dialogue.” (Webber, 1995 p.6)

With the advent choice as spearheaded by the charter school legislation, the government had an opportunity to shape and regulate its charter school program to facilitate equitable access to choice. In practice however, the issue of access is compromised by both inadequate funding and the relaxed enforcement of charter school guidelines.

Admissions

The scale of the current charter school movement is not sufficient to generate long-term inequities in the distribution of educational resources by student demographics (Levin, 2000), although issues of unequal access can be traced to an admissions process that is inconsistent between doctrine and practice. Because charter schools are by statute exempted from accommodating students with special needs, each charter board regulates its admissions process in a non-uniform and semi-regulated way, enabling a system with varying degrees of selection criteria across schools. In the case of admissions procedures, cream-skimming occurs in two forms; parents of higher socio-economic status can be more readily able to take advantage of better schools, enabling their children the best experience (Moe, 1995, Levin 1998) or schools themselves can choose students from higher socio-economic status and academic backgrounds through screening processes.

Of the three top schools by parent income (\$60,000-100,000/ year), two employ the most rigorous screening processes in admissions. Westmount (formerly ABC Charter School) and New Horizons are both for gifted students, and the schools require applicants to complete extensive application requirements. The New Horizons Charter School in Edmonton requires potential students to take an IQ test, and will screen based on the results.⁶⁴ Applicants are tested by a chartered psychologist, and then screened by an admissions committee. New Horizons is periodically over subscribed, and successful applicants may be placed on a wait list for entry. At Westmount Charter School in Calgary, students must complete self/parent assessments, provide academic records, and professional references/recommendations which are then followed up by a day of testing and observation at the school (students in grades 1-8) or an interview process (students from grade 9 to 12) plus completion of the C-CAT Screening Test with special attention to Non-verbal portion. (See Appendix A for details of school admission requirements and see Appendix B for average school family SES)

“Open Enrollment”

By doctrine Alberta’s charter schools are held to the same standard as public schools and are required to admit all students based on Section 8 of the *Alberta School Act*. However, the special

⁶⁴ <http://www.newhorizons.ab.ca/faq.htm#what>

exemptions regarding students with special needs translate into a system that is able to be selective in practice. As outlined earlier in the Alberta Education regulatory framework regarding admissions, charter school enrollment decisions are made on a case by case basis and in consultation with parents. Bosetti et al (2000) describe the ‘open access’ issue as a complicated process in application to charter schools. “Charter schools that focus on serving the needs of specific types of students have responded to the requirement for open access by assessing the fit between the student’s needs and the school’s program and then providing students and/or parents with that information so their choice to enroll can be an informed one.” (Bosetti et al, 2000 p. 128) In many cases and in spite of “open enrollment” policies, administrators take great care to counsel parents for or against enrolling their child based on test score results and a screening process. Westmount and Calgary Girls post on their websites that counseling on the appropriateness of the programming offered at the schools is a part of the registration process. Da Costa et al (2002) found evidence of a method of selection despite an “open enrollment” “process in their survey of ten charter schools in Alberta;

“ABC Charter school offers its students a challenging program and if it appears that a student will not be able to cope based on previous performance, parents will be encouraged to take the student elsewhere. In general, students are not turned away if there is room. The intensity of the program is emphasized, however, and “sometimes we counsel against enrolment before they even come.” (da Costa et al, 2002 p.9)

Non-Discriminatory Practices

By restricting eligibility of charter school access to minorities, charter schools can ensure they are providing equal opportunity of access to disadvantaged groups. At the time of this analysis, there is no evidence of Racial/ SES/ Needs-based Composition Quotas in Alberta’s Charter schools or in any of the Alberta Learning regulations governing charter schools in the province. The only examples of such practice in Alberta are in the cases of Boyle Street Education Center and Almadina Charter Schools. Boyle Street favors minority students by requiring that applicants be students who are unable or unprepared to attend the regular school system. Potential Boyle Street applicants must also express a desire to re-gain entry into the regular system.⁶⁵ Almadina students are screened for language proficiency at the time of application, to ensure they are in need of the school’s special ESL services.⁶⁶ (See Appendix A for details of individual admission requirements)

⁶⁵ www.bsec.ab.ca

⁶⁶ www.esl-almadina.com

Assessment of the Lottery Approach

Schools with over-subscription to their programs should admit a portion of students through a lottery process in order to avoid the problem of selection bias(Belfield and Levin, 2005). Some of Alberta’s Charter schools have significant waiting lists⁶⁷ (see Appendix A for individual school figures), and in 2007 four of the twelve charter boards in operation experienced over-subscription. Waitlists are not recent phenomena, as both Foundation for the Future Academy and Aurora Charter School had 4400 and 660 parents on their respective waitlists in 2004.⁶⁸ Of the four schools with current waitlists, all claim to have an open enrollment on a “first come first served” system of admission, with three schools giving priority to siblings.

Additional Costs to Parents: Instructional Fees

The addition of extra fees or tuition can increase inequity of access for those families that are limited by socioeconomic status. Alberta’s Charter schools may not charge tuition, however, they are allowed to charge fees to cover additional costs associated with resources, instruction and transportation at their discretion- a practice which is consistent with other public schools in the province. According to Bosetti et al, a typical charter school was charging additional instructional fees averaging \$100/ month in 1999 whereas local public school parents were subject to one quarter that amount. Today, ten of the thirteen charter schools in operation in Alberta currently charge additional instructional/ enrichment fees to all students. (See Appendix A) The two schools that do not charge additional instructional fees are Almadina-a needs-based ESL school, and Boyle Street -a special needs school with low student socio-economic status (See Appendix B) Fees charged by the majority of Alberta’s charter schools range from a low of \$275/ year (Foundation for the Future) to a high of \$350 (Calgary Science). Of the nine schools charging fees, only four made the amounts publicly available on their websites. (See Table 5, Information Reporting)

Other Costs

67 Association of Alberta Public Charter Schools www.aapcs.ca

68 Owens, Dennis, (August 2004). “School Choice: A Policy Whose Time Has Come,” Frontier Center for Public Policy, Policy Series No.23.

Three charter schools; Aurora, CAPE (Center for Academic and Personal Excellence) and Foundation for the Future require parents to purchase their children school uniforms.⁶⁹

Adjudication Procedures Evaluation

. The Charter School Handbook stipulates that parents may ask the minister to review fee impositions and admissions decisions at the request of parents. Information on the procedures to file grievances for fee exemptions and admissions decisions were outlined on approximately half of the charter school websites through links to individual school handbooks.

Transportation Evaluation

Students living within 2.4 km of any school in the province are expected to walk. An Alberta parent cannot apply for transportation funding from Alberta Learning directly, but the school can do so on the parent's behalf. Using these funds, public and separate boards contract out bussing using funds based on enrollment at a rate of approximately \$450/year for students inside a city (but beyond the 2.4 kilometer walking distance) and \$1000/ year per student outside of the city in 2008.⁷⁰ Section 51 of the *School Act* does not apply to charter boards thereby exempting them from the requirement to provide transportation to their students. The handbook states; "parents should be told whether the charter board has made arrangements for transportation," however this information is not consistently available on individual charter school websites for parents (See Table 5).⁷¹

A direct result of charter sponsorship through the minister rather than the local school boards has necessarily fragmented resources and isolated charter schools from the larger regular school district transportation systems, limiting parents who cannot afford to pay additional fees from exercising their right to choose charter schools in Alberta. Where larger school districts are able to pool their per-student allotments for transportation into bussing services, smaller charter school districts are often limited in their ability to provide the same service due to their inherently smaller student bodies. Therefore, when a charter school secures funding for qualifying students on an annual basis, they still prove unable to meet the costs of transportation and in all cases are charging parents

⁶⁹ CAPE principal Jeney Gordon in a May 2008 interview explained her school's uniform cost was minimal and possibly saved parents money in providing clothing for their child in comparison to the costs facing parents in the regular school districts.

⁷⁰ Ibid

⁷¹ Charter School Handbook, 2002 p.13

annual transportation fees ranging from a low of \$150/ year (Almadina) to a high of \$750/ year (Westmount/ ABC). (See Appendix A for transportation fees) Of all charter schools, the three schools serving special needs or ESL students provide either the lowest fees (Almadina at \$150/ year) or partial coverage (Boyle Street and Mother Earth). Boyle Street provides incentive to its students to attend classes by offering bus passes for attendance, and Mother Earth reported in 2006 the purchase of 2 school buses for its rural transportation needs. CAPE school in Medicine Hat reports that although it does not offer transportation services directly, most of its parents are given an annual reimbursement for transportation expenses at the end of the fiscal year when the school applies to Alberta Education for transportation funding on the parent's behalf. Some of these transportation reimbursements are diverted to outstanding instructional fees and the balance are issued on a case-by-case basis to parents.⁷²

The lack of common home neighborhoods for charter school students is a key explanation for the difficulty in charter schools obtaining or arranging transportation either in conjunction with the regular or separate systems, or by their own initiative. For example, in the city of Medicine Hat, only 5 of the 144 students attending CAPE charter school live within the 2.4 kilometer range of walking distance to the school. CAPE reported that they attempted to obtain transportation services for their students through pooling with Catholic and Public School boards but this attempt was unsuccessful due to incompatibilities between the more concentrated residences of students of Catholic and Public school districts and the scattered residences of charter school students throughout the City. Due to rapid population growth experienced in Medicine Hat, the limitations of shared bussing between Catholic/ Public school boards and CAPE charter board was also attributed to a lack of space per school bus. After failed attempts to provide their own bussing, the school has settled on offering parents reimbursement for the costs of providing transportation. "We facilitate transportation," reported CAPE Principal Jeney Gordon in a May 2008 interview. CAPE retains the administrative costs associated with transportation and any unpaid school instructional fees before passing on the remainder of the transportation grant to the parent at the end of the school's fiscal year which runs September 1 to August 31st. In 2008 fiscal year, the amount of reimbursement is estimated to be approximately \$480 per student who resides in town and \$1000 for students who reside in rural locations for CAPE charter school parents.

⁷² Interview with CAPE school Principal, May 15, 2008

School boards are required to provide transportation for severely disabled students to designated special needs programs. Alberta Education provides 100% funding for this service. Most charter schools specifically state they do not have the capacity to serve special needs students, and they are not bound by the same transportation requirements of regular school boards. The students at Boyle Street Education Center are typically street youth with no means to finance their own transportation. (Bosetti, 1995 p.14) Almadina Language Charter Academy caters to a student body that is majority ESL. Where many local school boards are able to provide bussing funded by Alberta Education for children enrolled in language programs outside their residency area, Almadina students face \$150/ year in transportation fees. Almadina's parents are therefore at a disadvantage to other public/ separate/ francophone parents who receive transportation to language programs as a part of their local district service.⁷³ Mother Earth's Children's Charter school is located in a rural area outside of Edmonton, and transportation is a major problem for the school according to its 2006 three-year plan and AERR reports.⁷⁴ (Appendix C provides an excerpt from Mother Earth's 2006/07 AERR. The sample reflects the limitations of staff and resources at this rural charter school in addressing the needs of its at-risk students) Mother Earth's Children's Charter reported purchasing 2 buses to solve part of its school's "serious student transportation problems" in 2006. With small enrolment (~100 students) and high proportions of special needs students, Mother Earth would be better able to serve the needs of its students were it able to provide special needs transportation under the greater *School Act*.⁷⁵

The idea that charter schools are in competition with other schools is thought to have rendered the neighboring local public and Catholic school districts unwilling to work with charter schools to provide transportation.⁷⁶ Cases of hostility towards charter schools by their sponsoring school boards were seen early on in Alberta. The first charter school in Alberta, the now closed Education for the Gifted (EFG) Charter School was one of the only charter schools sponsored by a host school board, (Elk Island School Division near Edmonton.) Born in political controversy as an "elitist" school for gifted students, the charter school faced hardship from its inception. (Bosetti, 1995 p.16) Because the

⁷³ Local districts can charge fees but language programming needs are heralded as a service that is mostly provided free of charge according to Alberta Education, <http://education.alberta.ca/parents/educationsys/ourstudents.aspx>

⁷⁴ See Mother Earth's website <http://www.meccs.org/> AERR 2005/06

⁷⁵ See Appendix D for an excerpt from Mother Earth's 2006 AERR. The school seems to be struggling with several administrative and support issues and evidence of this is abundant in its reporting documents and minimal website.

⁷⁶ Interview with CAPE's Principal May 2008

school was sponsored by the school board, it was entitled to the local division's transportation resources, yet the hostility was clearly evident:

“The School Board viewed the Charter School as a program of choice, and would therefore not change the established bus route to accommodate delivering the Education for the Gifted Charter student to the school site. Instead, the students (were) dropped off three blocks from the school. The EFG has arranged to have teachers or parent volunteers escort the elementary school children the three blocks to the school site.” (Bosetti, 1995 pp. 19-20)

Equity: Bigger May Be Better

Charter schools are much smaller in size than regular public/ separate schools in Alberta. The minimum enrolment allowed for any charter school is 100 students, and current enrolments range from 115 students (Mother Earth) to an isolated high of ~1000 (Westmount), with most schools falling in the 200-350 range (See Appendix A). Each charter school is governed by its corresponding charter board, and only one charter board is operating more than one school (Foundation for the Future currently operates 4 schools with total enrolment of 1804 in 2005). Most individual schools in the regular public/ separate system enjoy the benefits of pooling of resources as several schools fall under the jurisdiction of a single governing board. The ratio of students to school board in the province is much higher in the public and separate systems (see Table 1) and this unfortunately has resulted in limitations on the range of services and capacities of single charter schools operating under single charter boards.

Special Needs Programming

As it stands, Alberta's charter schools do not favor children with disproportionate need, although a minority- (three schools) cater to specific special needs or ESL populations (Boyle Street Education Center and Mother Earth's Children's Charter School cater to special needs students, and Almadina is for ESL). Both Boyle Street and Mother Earth enroll a majority of special or severe needs native students, and the schools' charters are premised on serving these populations. Of the 9 remaining charter schools, no provision of special needs programming exists, although two schools (Westmount, formerly Action for Bright Children, and New Horizons) specifically target gifted students. (See Appendix A for individual school programs for special needs students)

4. Social Cohesion Dimension

Evidence of a common educational experience that will prepare students for social, political and economic institutions in society (Levin, 2000) are the components of social cohesion for the purpose of this analysis. Through unique organizational practices and instructional strategies, Alberta's charter schools appear to be taking steps towards socializing their students to a common goal of productive and viable citizenship. Schools are required to document the measures of their stated charter goals and outcomes on an annual basis, and for the most part, student and parent satisfaction are key assessment tools. All such outcomes and measures are publicly available on individual charter school websites through AERR's, Three Year Plans, or School Charters.

Common Elements of Curriculum

As mentioned previously, charter schools must adhere to the same core curriculum and accountability standards as the rest of the province. The standards-based accountability in place is testimony to the Alberta mandate that all students gain strong elements of academic cohesion in their education. The provincial outcome requirement that students demonstrate progress along lines of lifelong learning, employment preparedness, and through model characteristics of active citizenship are all examples of how Alberta Education prioritizes social cohesion.⁷⁷ As a part of the seamless choice plan, students are supposed to be able to transition between schools without too much variation in curriculum. All students are assigned one student identification number, and this number follows them from kindergarten to grade 12. Positive externalities derived from a common educational experience are evidenced from school practices which may have come at the cost of choice or efficiency (Belfield and Levin, 2005) and how the province has addressed this trade-off by strict standardized requirements is an indicator of which goals are a priority for Alberta.

Civic Responsibility & Engagement

All charter schools make it part of their mandate to teach their students the skills necessary to survive and thrive in civic society. (See Appendix D for a full break down of individual goals and outcomes relating to social cohesion by school) For example, Almadina Charter School's Mission Statement specifically states: "The Almadina School Society, through its partnerships with the Minister and all stakeholders, ensures that our students whose second or third language at home is English reach their full potential as they prepare to meet the challenges of high school, lifelong

⁷⁷ Outcomes 2,3 and 4 of Provincial Goal 2: Excellence in Learner Outcomes are required progress reporting for all charter schools in their Annual Education Results Reports.

learning and citizenship in a dynamic, democratic, knowledge-based society that respects each child's special gifts and the commitment to promote diversity in shared values.”⁷⁸ Three of the five learning objectives for the Center for Academic and Personal Excellence (CAPE) center on life skills such as 1) respect for self and others, 2) awareness and appreciation of world cultures, religions, philosophy and fine arts, and 3) understanding of business and the entrepreneurial spirit.⁷⁹ Aurora Charter School's stated goals include several elements of social cohesion geared toward developing active citizenship and community participation.

Other evidence of civic responsibility included student volunteerism rates and participation in extra-curricular events, participation in public performances and fairs, student portfolios, and documentation of student conflict resolution across charter schools. Westmount Charter School reported that 14 of its 40 grade 12 students received recognition for leadership, and 17 for Community Volunteerism.⁸⁰ In-school and community-based initiatives in 2006/07 included: Health In Perspective (HIP), where High school students underwent training provided by the Calgary Health Region and in turn mentored grade 5 students on positive life choices and healthy living; A music extravaganza that raised over \$2000 for War Child Canada; a 5 kilometer walk for war-children in Uganda, and the adoption of a child by a grade 10 class.⁸¹ Suzuki Charter School Division I students participated in the Science Olympics sponsored by the Association of Professional Engineers, Geologists and Geophysicists of Alberta in 2006 and performed several public concerts.⁸² CAPE students are also volunteers in various community organizations through the school's Wellness project.⁸³ CAPE Charter School demonstrates social cohesion through tracking instances of conflict resolution, problem-solving, and democratic interaction with peers on an annual basis.⁸⁴ Calgary Arts Academy students participated in community theatre productions, Wonderville.ca Science Challenges, and an exchange program with students from Quebec.⁸⁵

Charter School Student Body

⁷⁸ <http://www.esl-almadina.com/info/vision.html>

⁷⁹ Bosetti, L., E. Foulkes, R. O'Reilly, and D. Sande 2000. Canadian Charter Schools at the Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta. SAEER Research Series #5.p. 150

⁸⁰ Westmount Charter School 2006/7 AERR Report

⁸¹ Westmount Charter School Annual Education Results Report 2006/7

⁸² Suzuki AERR 2006 p.14

⁸³ CAPE AERR 2006-2007, p.161

⁸⁴ Bosetti, 2000 p.150

⁸⁵ Calgary Arts Academy AERR 2006 p.4

The homogeneous nature of charter school populations is a result of unique programming and specific admission criteria. Students are drawn to individual charter schools and are sorted into relatively homogeneous demographics, whether they are special needs native minority students (Boyle Street and Mother Earth), gifted students (New Horizons and Westmount), musically inclined (Suzuki), or Arabic ESL students (Almadina). Schools with “average” student populations (the largest of which is Foundations for the Future) make it clear that they do not offer any programs for unique students; “FFCA does not offer Special Needs programs at either end of the spectrum. FFCA does not offer unique programs to accommodate gifted students” (FFCA Website).⁸⁶ Conversely, some teachers are calling their schools ‘safe havens’ for students who have not felt safe or normal within the regular system and in one case, (Westmount) the school’s homogeneity generates a strong sense of community.⁸⁷ Arguably, the end result is that students are exposed to students with similar interests, abilities and because of inequities in transportation and fees, similar socioeconomic status. (See Appendix B for more information on individual school demographics). The merits of specialized programming naturally draws homogeneous student bodies, and if charter schools are implemented on a large scale, this may come at the cost of social cohesion by generating a lack of school and classroom diversity for the province as a whole.

Part III: The Future of Alberta’s Charter Schools

“Any future demise of the charter school movement in Alberta could not be attributed to the lack of efforts of the charter school pioneers; rather it will be attributed to the regulatory environment and the lack of political will of the government who introduced it in the first place.”

-Bosetti et al, 2000 p.162

“It is apparent that Canadians are generally content with the notion of a public school education. There is not the overwhelming sense of urgency towards private education that might be sensed in other countries.”

-Goddard, 2000 p.5

Regulation Headaches

The charter school movement in Alberta has come to be known as a revolutionary movement within the context of Canadian education reform. “Alberta's decision to create charter schools—the first province in Canada to do so—and to increase the funding provided to private schools heralded the

⁸⁶ www.ffca-calgary.com

⁸⁷ Da Costa et al, 2002

beginning of what might be described as a marketplace approach to public education.” (Matsumoto, 2001 p.18) However, the movement itself is virtually paralyzed by the politics and regulations behind the legislation. Subject to a problematic accountability and renewal process, charters are in direct conflict with their authorizing entities, and the program has barely expanded in its 14 year history (see Table 1).

In general, the lack of support from local school districts to charter schools is a consistent and distinctive theme in the story of Alberta. With all but one charter school sponsored by the Education Minister, the process of accountability of charter schools by-passes local school boards, generating even greater tension. Not only is the review for application of a charter school considered time-consuming to a would-be sponsoring school board, it is also in direct conflict of interest as any approval comes at the cost of losing local board students and the funds that accompany that child to the charter board.⁸⁸

“My first response to the new legislation was a proposal to my board of school trustees that we not just publicly complain, but that we aggressively respond to the legislative changes. We believed our system would serve kids as well, if not better than any charter or private school. Even at that time we were a district of choice with more than 20 years of experience in alternative programming and open boundaries. Now we just had to prove ourselves to the naysayers.

As a further response to the legislation, I asked my board to pass a motion stating that available space in our schools, as well as closed facilities, would not be leased to private or charter schools. They also reaffirmed the Edmonton Public Schools as a "district of choice" and emphasized this commitment in our mission statement.”

- Former Edmonton Public Schools Superintendent Emery Dossall, 2001

School Boards are also hostile towards charter schools for what they term “an uneven playing field” according to Alberta School Boards Association president Maureen Kubinec in a recent article in the Calgary Herald regarding increasing charter school access to capital. “Their teachers do not have to belong to the Alberta Teachers’ Association. They have more selection of students and don’t have to accept every student. We want a level playing field.”⁸⁹ The fact that Charter Schools are able to exercise some form of selection through special programming, and the fact that these schools are not expected to provide for costly special needs students, may place charter schools at both an academic

⁸⁸ Bosetti, 2001

⁸⁹ McGinnis, Sarah, “Education Minister Committed to Charter Schools, Liepert Willing to Remove Restrictions,” Calgary Herald, November 5, 2007

achievement and cost advantage over public schools. As reported in Table 9, charter schools today are still expressing problems in dealing with both the local districts within which they operate, and with the Alberta Teacher's Association.

Teacher Politics

The Alberta Teacher's Association maintains the position that the current public system provides ample choice as is; "Alberta's public education system offers high-quality education, choices for students, progressive change and improvements, and parental and community input."⁹⁰ The mandate that all charter school teachers be accredited but not members of the Alberta Teachers Association has arguably done a lot more harm than good.⁹¹ Through a survey of press surrounding the inception of the charter school movement in Alberta in 1995-1996, Lynn Bosetti found support for early predictions that the charter school movement would have more flexibility in hiring teachers and determining salaries and negotiating contracts. On the flip side, teachers were not subject to the code of conduct imposed on ATA members, and the ability to collectively bargain was lacking. Additional problems that have surfaced due to regulation and the limited term of charters include high turnover of administration and teaching staff at Alberta's Charter Schools (Bosetti et al, 2000). Of the 11 schools in operation in at the time of Bosetti et al's 1999 survey, most schools were in their first to third year of operation, and already 24 teachers had left the system.⁹² Teachers interviewed by Bosetti et al reported their greatest satisfaction to be with professional issues and the students themselves. The greatest sources of discontent reported by the responding teachers were inadequate facilities, resources and heavy workloads.⁹³

Sharing of Best Practices

⁹⁰ Alberta Teacher's Association (2004) "Exploring a Controversial Issue in Education: Charter Schools," <http://www.teachers.ab.ca>

⁹¹ In no literature did I find evidence otherwise

⁹² Bosetti, L., E. Foulkes, R. O'Reilly, and D. Sande 2000. *Canadian Charter Schools at the Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta*. SAEE Research Series #5.

⁹³ Bosetti, L., E. Foulkes, R. O'Reilly, and D. Sande 2000. *Canadian Charter Schools at the Crossroads: The Final Report of a Two-year In-depth Study of Charter Schools in Alberta*. SAEE Research Series #5.

The Charter School Handbook mandates that other public schools in Alberta are to have the opportunity to learn from innovative programming and techniques of charter schools. This mandate is largely unfulfilled due to the above mentioned conflicts with local school boards and relations with the Alberta Teachers Association.⁹⁴ Table 9 shows all schools reported problems with their local school districts, the ATA and/or their charter boards in 2001.

Table 9 Charter School Self-Reported Weaknesses					
	Problem Relationships	Problem Areas		Problem Relationships	Problem Areas
ABC Charter School	ATA* School District	Facilities Transportation	Foundations for the Future	School Governance	Facilities Extra Curricular
Almadina	School Governance ATA School District	Raising Achievement Facilities	New Horizons	ATA Local District	Supplies/ Materials Facilities
Boyle Street Coop	ATA Local District	Minimal Parental Involvement Discipline Assessment	Suzuki	School Governance Lack of Gov. Support ATA Local District	Resources Facilities Transportation
Centre for Academic and Personal Excellence (CAPE)	ATA Local District	Facilities Transportation Salaries/ Benefits	Moberly Hall Charter School	ATA	Salaries/ Benefits
			Mundare Community School	Parental Involvement ATA Local District	Facilities Resources Instructional Materials Benefits

*Source: da Costa et al, 2002

Implementation Woes

“In reviewing the external political conditions of the Alberta charter school movement and looking critically at the factors that contributed to the closure of one Alberta charter school, it appears that one should not be surprised at the instability of the movement.”

-Gereluk, 2000 p.22

⁹⁴ Many schools reported difficulty in sharing practices with local school districts in their AERR’s

The established regulations and guidelines for Alberta Charters are only as useful as the degree to which they are funded (Levin 2000), and a proper implementation scheme includes adequate resources, monitoring, technical assistance and sanctions. Charter schools are systematically underfunded relative to the public system in Alberta (Bosetti, 2001 and Hepburn and Van Belle, 2003) presenting another huge handicap to development or growth. In her research, Bosetti found on average charter schools to be dedicating 10-15% of their operational budgets to funding capital expenditures, at the cost of class size and teacher salaries (Bosetti, 2001, pp. 115-116). Table 9 illustrates 7 out of ten charter schools had problems with facilities, resources or salaries in 2001. In a recent article in the Calgary Herald in November 2007, charter schools were described as struggling under inadequate funding which was further exacerbated by strict renewal regulations. "The uncertainty of not knowing if a charter will be extended also makes it almost impossible for charter schools to seek public-private partnerships or secure loans to construct their own facilities." (Calgary Herald, Nov 5, 2007)

Poor support and lack of funding was acknowledged by the Minister of Education himself when addressing a Charter School in November of 2007, and yet his only promise to address the problem was by saying Alberta Education is willing to consider relaxing some of the renewal regulations, including the five-year renewal process.⁹⁵ The initial allocation of only one individual by Alberta Education, Ron Babiuk, to develop the vision and policy of Alberta charter schools was an example of the mismatch between the mandate and the implementation resource plan, according to Gereluk. "Unlike many of the United State's Education departments where often there is an entire department devoted to charter schools, Babiuk did not have a department to work on charter schools. Furthermore, no university within Alberta had created a policy institute to develop research to help support charter schools." (Gereluk, 2000 p.11) A general lack of training for charter board members was found to be a consistent issue with charter board members across Alberta. Minimal programs were in place to assist in the gestation phase of many new charter schools and a general confusion about the roles and responsibilities of the board persist.⁹⁶ As a result, the uncertainty under which charter schools are left to operate in Alberta is a constant headache for stakeholders.

⁹⁵ McGinnis, Sarah, "Education Minister Committed to Charter Schools, Liepert Willing to Remove Restrictions," Calgary Herald, November 5, 2007

⁹⁶ Gereluk, (2000) "The Charter School Collapse, A Case Study," Paper presented at the Annual meeting of the American Educational Research Association, New Orleans April 24-28, 2000)

Conclusion

Alberta's charter school system- like other charter school systems in North America-cannot simultaneously prioritize the four criteria of choice, productive efficiency, equity and social cohesion. By design and through implementation, all systems of privatization will emphasize and ultimately accept a trade-off of one criterion over another, based on priorities. Without charter schools, Albertans would ultimately face less choice in the school marketplace. Charter schools by their small number have increased options to parents, and by their very presence have sparked a competitive response from surrounding districts, leading local school boards to diversify and enhance their own systems of choice. However, the choice criteria is in some cases compromised by incomplete information about schools for parents, and a sponsorship and renewal process that is not conducive to expansion. Productive efficiency has seen steady improvement through gains in academic achievement at the school level, although these results may be attributable to an admissions process that facilitates screening in some charter schools in spite of an open enrollment mandate. The cost-benefit of charter schools is a missing but crucial aspect of charter school performance evaluation in Alberta and will provide more answers on productive efficiency in the future. Equity is compromised by a lack of transportation and special needs programming at charter schools, and in some instances, the imposition of fees may prevent low-income families from being able to enroll their children. These issues must be addressed if all Albertans are to have access to the benefits of this movement. Finally, the criteria of social cohesion is strong and by my estimation- of utmost importance to the people who make the decisions that shape education policy in Alberta. Unified by a standard core curriculum, provincial priorities and outcomes and then held accountable through standardized testing and provincial annual reporting procedures, Alberta's charter schools are committed to the social cohesion criterion.

Taking into account the four criteria and the three dimensions of charter school regulatory design used to evaluate Alberta's charter school movement, the result is a system that ultimately prioritizes social cohesion over choice and productive efficiency over equity. The question is; does the current state of charter schools reflect the will of the greater public? High levels of reported parental satisfaction and evidence of exceedingly large waitlists indicates demand for charter schools in the province exceeds supply. However, on the role of charter schools in Alberta into the 21st century, former Alberta Education Minister Mr. Ron Liepart conceded at the conclusion of his speech at Calgary Arts Academy in November 2007; "I believe charter schools can play a greater role as incubator for innovation in our education system. I don't want the charter school of tomorrow to look

just like the alternative program being offered in the public system.” Mr. Liepart’s remarks spell a clear vision for charter schools in Alberta, one that is rooted in the greater philosophy of social service delivery that embodies Canadian socio-political ideology: an ideology of continued public delivery and control of education.

Current Charter Schools in Alberta:

1. Almadina Language Charter Academy
www.esl-almadina.com

2. Aurora Charter School
www.auroraschool.com

3. Boyle Street Education Center
www.bsec.ab.ca

4. Calgary Girls School Society
www.calgarygirlsschool.com/

5. Calgary Arts Academy Society
<http://www.calgaryartsacademy.com>

6. Calgary Science School
<http://www.calgaryscienceschool.com/>

7. CAPE - Centre for Academic and Personal Excellence Institute
www.capeisgreat.org

8. Foundations for the Future Academy Charter School Society
www.ffca-calgary.com

9. Mother Earth’s Children’s Charter School
<http://www.meccs.org/>

10. New Horizons
<http://www.newhorizons.ab.ca/>

11. Suzuki Charter School
<http://www.suzukischool.ca/>

12. Westmount Charter School, *The Centre for Excellence in Gifted Education* (Formerly ABC Charter School)
<http://www.westmountcharter.com/>

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<http://www.aisca.ab.ca/03-02news.htm>

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Appendix A

Alberta Charter School Overview

School	Focus	Admission Requirements	Lottery/ Waitlist	Special Needs	Transportation	Additional Fees
New Horizons (180 Students)- 1995 K-9	Gifted Education*	IQ Testing, Screening by psychologist and admissions committee* -reference letter attesting ability from previous school**	No*	No info	No Info	School Instruction Fees (figure not on website)*
Westmount (ABC)(1000 Students)- 1996 K-12	Gifted Students*	All applicants provide a significant amount of written information: self/parent assessment, academic records, and professional references/recommendations. If there are psychological-educational assessments in place, those are requested. In addition, students from grades 1 to 8 will come to the school for a day of testing and observation. Students from grade 9 to 12 will engage in an intake interview process in addition to the written information that they submit.* C-CAT Screening Test (attention to Non-verbal portion)**	significant number of openings grades 10, - 12; the openings grades (2-9) ~ 10 per grade level.*	No info	(\$750/year) 40% students ride bus 51% of our students eligible for parent provided funding program in 2008*	additional Instructional fees**
Foundation for the Future Academy Est. 1997 K-11 (1804 students in 4 locations 2005)	Traditional School. Focus on structure and standards* Targets "average students"***	Open Enrolment: Sibling preference, geographic boundaries -admission interview* -Assessment of child's learning threshold** (used to place children, not to screen)	4400 on waitlist in 2002**	FFCA not geared to take "students within the 10% at either end of the academic spectrum"*** FFCA does not offer unique programs to accommodate gifted students.*	\$450/ year (amount not available on website).* City limits only	\$275/ year (amount not posted on website) School Uniforms

School	Focus	Admission Requirements	Lottery/ Waitlist	Special Needs	Transportation	Additional Fees
Mother Earth's Children's Charter School (115 students in Grades K through 9)	90% of the students are of Aboriginal background	No Info	No Info	Majority of students unable to write provincial PAT's	School purchased 2 school buses for 2007 School serves a rural area	Instructional Fees (amount not available)
Calgary Science School (grades 4-9) 600 Students	Math and Science Education*	Testing is conducted to ensure that the applicant is performing at grade level.*	First come, first served* Waitlist 600 **	No info	\$675.00 per student*	School Enrichment* Fees \$350/year*
Calgary Girls School (4-9) 552 students Est. 2003	Women's History and Perspectives*	Short Essay Math and Language Arts assessment Interview Review of past performance documents	No Current Waitlist	No info	625.00 per year*	Fees:\$295/ year
Calgary Arts Academy (2003) 342 students	Arts*	Interview plus audition* Standardized Testing		No info	\$500/year	Resource Fees
Boyle Street (1996) Ages 14-19* 125 students in 2006	At – Risk Youth, mostly Native***	Year-round, continuous enrolment The charter school admits only students who are unable or unprepared to attend a mainstream school. *** Only pre-requisite: students must express a desire to re-enter the public system**		Most students are special needs	"Earned Transportation" <i>Students living more than 1.2 km away "earn" bus tickets through classroom attendance and work completed</i>	No Fees

School	Focus	Admission Requirements	Lottery/ Waitlist	Special Needs	Transportation	Additional Fees
Center for Academic and Personal Excellence (CAPE) Est.1995 Grades k-8 (141 Students 04-2007)	To foster academic and personal excellence* 40-45% students gifted**	“open enrollment” “First come first served via waitlist.”* -parents are counseled on the appropriateness of the programming**	Waitlist	Gifted/ Talented Program developed in 2003 to address needs of at risk/ severe special needs students in the school, however, the needs of these students were beyond the capacity of CAPE and in 2006 sever special needs students were referred to the Public School System.*	None provided, but transportation grant is transferred to parents	Instructional Fees-range from \$ 145-205 per year (grades 1-8) and \$50/ month Kindergarten (only those parents who can afford) Unpaid fees are written off by the school as “bad debt.” *School Uniform + Physical Education Wear
Aurora Charter School Est. 1996 (440 Students) K-9	Traditional Academics* Targets “Average Children”***	“First come, first serve” Sibling Priority	Waitlist up to 786 Students**	No programs, students with special needs encouraged to leave**	Fee (no info on website)	Instructional Fee (no info on website) Uniform
Almadina Charter School Est. 1996 K-9 (320+ students)	ESL* 95% Muslim (75%) Arabic**	Principal may ask for an interview. All children are to be tested for language skills prior to admission.		not equipped to deal with severe or other types of special needs students	\$150.00/ year*	No Fees
Suzuki School(176)-1997	Music Education, Suzuki Method*	Parents must attend instructional observation sessions to determine if the Suzuki method is appropriate for their child* Sibling Priority	Yes* “Substantial waitlist”***	No info	No Info on Website*	\$285/year

*Source: Individual Charter School websites AERR’s, Three Year Plans and Individual Charters

**Source: da Costa et al, 2002

*** Source: Bosetti, 2001

Appendix B Student/ Family SES Characteristics			
<i>Sources: da Costa et al, 2002 and Individual Charter School AERR's</i>			
	Parent Income	Parent Education	English as First Language
ABC/ Westmount Charter School	\$60,000-100,000/year	High School-Bachelor Degree	85% mothers 93% Fathers
Almadina	\$30,000-\$40,000	High School – some Post Secondary	10% Mothers 3% Fathers
Aurora	No info		
Boyle Street Coop	Students are all special needs-severe needs	¾ students report living with one or no parents**	Most students are of Native Origin
Centre for Academic and Personal Excellence (CAPE)	\$40,000-\$60,000	High School-Bachelor Degree	89% Mothers 90% Fathers
Foundations for the Future	\$40,000-\$60,000	High School-Bachelor Degree	86% Mothers 89% Fathers
New Horizons	\$60,000-\$100,000	High School-Bachelor Degree	94% Mothers 97% Fathers
Suzuki	\$40,000-\$60,000	High School-Bachelor Degree	96% Mothers 95% Fathers
Moberly Hall Charter School	\$60,000-\$100,000	High School-Bachelor Degree	97% Mothers 90% Fathers

Appendix C

Mother Earth Children's Charter School

Annual Education Results Report 2005/06 Excerpt

pp. 20-21 Available at <http://www.meccs.org/>

a) What has improved over the past year?

- The school is more organized and there is less confusion.
- Communication is better now.
- Less tension in the school
- No big changes – good or bad.
- Native teachings and content has somewhat declined from last year.
- There are no more complaints this year.

b) What improvements would you recommend for the future?

- A new school with a gymnasium “on the land” (near Alberta Beach) – as the current location was supposed to be a temporary location
- More outside play and teaching space is required.
- Would like to see more Aboriginal teachers in the school.
- A better location away from the railroad tracks.
- Teachers should take more training pertaining to working with children with special needs.
- More effective behavior modification techniques must be created in which teachers learn about why students act out in a negative manner (i.e. – family dysfunction, etc.)
- An Edmonton chapter of the MECCS Parent Advisory Council.
- Bussing needed.

Appendix D

Evidence of Social Cohesion in School Individual Charter Goals and Outcomes

Source: Individual School AERR Reports, Three-Year Plans and Charters as posted on school websites

* Source: da Costa et al, 2002

	Social Cohesion in Charter Outcomes (Mission or Motto in quotations)	Goal Measurement
ABC/ Westmount	Charter Outcome “g” – Students will develop understanding, acceptance and appreciation for the capabilities, interests and needs of others.	-portfolios -interviews -competency checklists -progress reports -contracts/ independent study records* -Parent/ Student satisfaction survey
Almadina Language Academy	“Read and Write: Reach the Height”	Almadina pre-tests all newly registered students : K to 9 -Listen/ read/ Write Exit/ Entry Benchmarking -misbehavior tracking
Aurora	<ul style="list-style-type: none"> • to produce responsible citizens who recognize the value of hard work and enterprise • to develop in students the desire to be productive, law abiding and loyal citizens • to develop in students effective communication, leadership and decision-making skills • to prepare students to enter the global economy • to develop in students a thorough love and understanding of Canada from the context of history, geography, culture and its relationship to the world ⁹⁷ 	-PATS -Academic Competition Participation -extra-curricular events -attendance rates -parent satisfaction surveys -graduate post-secondary performance*
Boyle Street Education Center	-to encourage the participation in and commitment to the education process by parents and caregivers, students and the community. -To maximize capacity: to pursue post-secondary learning to enter the workforce and; to understand the rights and responsibilities of citizenship. Students model the characteristics of active citizenship.	Graduation Rates Post-secondary enrollment* Total number of high school credits earned -Dropout rates -High school/ post-secondary transition rates -Survey of student/ parent/ teacher satisfaction with school programs connecting student and community - Survey of student/ parent/ teacher

	<p>Students are well prepared for employment. -The education system meets the needs of all K-12 students, society and the economy.</p> <p>acquisition of social and employability skills -responsible, caring and contributing members of society</p>	<p>satisfaction that students model the characteristics of active citizenship.</p> <p>-Average yearly attendance</p>
Calgary Arts Academy	<p>"children and community that value arts and learning..."</p> <p>to promote the arts and foster academic excellence, practical skill building and spirited citizenship</p>	
Calgary Girls	<p>"Today a community of girls, tomorrow our community leaders"</p> <p>development of strong leaders who are intellectually adept and community minded</p> <p>Students are involved in positive ways in supporting many community groups in their goals to improve life, both locally and globally</p> <p>Charter outcome: girls are socially and emotionally strong</p> <p>Charter Outcome: Girls have knowledge of women's contributions in history and in the present day.</p>	<p>Student/ parent satisfaction rates</p>
Centre for Academic and Personal Excellence (CAPE)	<p>Development of Citizenry and Social Skills High Community and Parental Involvement</p> <p>-Classroom meetings for democratic problem solving/ conflict resolution -Culture-based Second language program available in French and Spanish</p>	<p>-Behavior contracts (signed by parents and students)* -"competitive endeavors"* - Parent and Student Surveys</p>
Foundations for the Future	<p>"To provide a safe and caring environment where academic excellence, character development, parental involvement and staff leadership are valued and fostered."</p>	<p>-Waitlist -Discipline problems rare -low staff turnover*</p>
Mother Earth	<p>All students will have a full opportunity to develop citizenship</p>	<p>Parent/ student satisfaction surveys</p>

	skills as called for in the Program of Studies and in the MECCS Charter	
New Horizons	<p>“enable gifted students to strive for excellence in an environment which is low-anxiety, positive, and supportive of the individual”</p> <p><i>Goal 2: Students benefit from opportunities for positive social interactions</i></p> <p>Outcome 1: Students will develop positive interdependence skills.</p> <p>Outcome 2: Students will become creative risk-takers socially.</p>	<ul style="list-style-type: none"> -pre/post testing -writing samples -student contracts -student directed self-assessment* -volunteerism -scholarship rates Participation rates of students involved in extracurricular activities -Parent/ Student satisfaction surveys
Science Alberta Charter School	<p>Teachers foster problem-based learning in their classrooms</p> <p>The school treats students as partners in the democratic process</p>	<ul style="list-style-type: none"> -annual focus on broad problems (i.e. energy conservation) and presentation to community (judged by panel of experts) -portfolios* -parent/ student surveys (Number of opportunities for students to provide leadership and have a voice in decision-making. from Q 12 of the Annual Student Survey)
Suzuki	<p>“academics enriched with music”</p> <p>Outcome 2 Students are cooperative</p> <p>Outcome 4 Students are responsible.</p>	<ul style="list-style-type: none"> -student/ parent surveys -performances -inter-school fairs -public performance