

THE RESPONSE OF A PUBLIC SCHOOL DISTRICT TO CHARTER SCHOOL
COMPETITION: AN EXAMINATION OF FREE-MARKET EFFECTS

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The purpose of this study was to examine a school district's responses to charter schools operating within its boundaries. The selected district was the only one in the state with two large academically competitive charter schools for at least two years. Four questions guided the research: In terms of instruction, finance, communication, and leadership, how has the traditional district been impacted due to charter school existence?

The exploratory research was timely since charter schools are proliferating as tax-supported public choice schools. While many have speculated about free-market effects of charter school competition on systemic educational reform, the debate has been chiefly along ideological lines; therefore, little empirical research addresses this issue.

Quantitative and qualitative methodologies were used to present a comprehensive case study. Twenty-six school officials and teachers were interviewed; 159 teachers and 1576 parents were surveyed. District, community, and state education department documents were analyzed.

Since charter schools have existed in the district, numerous activities have taken place. Instructional initiatives included a high school academy, expanded technology, gifted and talented, tutoring, and dropout prevention. All elementary and middle schools required uniforms. The district's state accountability rating improved from acceptable to recognized. A leadership void was perceived due to students leaving to attend charter schools initially. The district was perceived as making efforts to improve communication with the community. The financial impact of charter schools was neutralized due to the district's student population increase, property wealth, and state charter funding structure.

The data supported all of the hypotheses in terms of the impact of charter schools in the district on these activities: free-market effects of charter school competition were not established as the primary reason for internal organizational changes that occurred in the district. Anecdotal evidence suggested that charter schools may have played some role, but primarily they seemed to reinforce trends already occurring in the district.

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CHAPTER ONE

INTRODUCTION

An entire generation has passed through America's public schools since the National Commission on Excellence in Education declared the United States a nation at risk in 1983. But the quality of the nation's public schools is still questioned by many. Critics charge that today's schools are technically backward because "we teach children the same way we did 200 years ago: one teacher in front of a bunch of kids in a closed room" (Friedman, 1995) and that they "look the most like industrial plants from a vanished era" (Gerstner, Semerad, Doyle, & Johnson, 1994, p. 4). Others have suggested that educational quality is in a state of crisis in the inner cities, and this condition has recreated a separate and unequal system in which educational opportunity does not exist equally for all (Bonsteel, 1997; Kozol, 1991). In such a system, only families with adequate economic means can exercise choice to shape their children's education, either by moving to neighborhoods with effective public schools or by paying tuition for private education.

Student outcomes, as measured by performance on various assessments, exacerbate these concerns. For example, comparisons from the Third International Mathematics and Science Study (TIMSS) place students from the United States near the bottom of participating countries (Pursuing Excellence, 1998). Surveys such as the Phi Delta Kappa/Gallup polls have indicated that confidence in the nation's public schools has declined and support for government financial aid to nonpublic institutions has increased (Rose, Gallup, & Elam, 1998).

Tax-supported public schools educate approximately 90 % of America's students, a situation John Coons calls the "quintessential self-serving monopoly" (1997, p. 108). This educational monopoly has been linked to indifference to needs of families, stagnant

bureaucratic management systems, and a lack of accountability, all of which have resulted in dissatisfaction in the performance of American students (Boaz, 1991; Coulson, 1999; Kirkpatrick, 1998; Murphy, 1996). While there have been numerous attempts to remedy educational problems, Chubb and Moe (1990) point out that previous efforts at school reform have failed because of controlling school bureaucracies that are highly resistant to change.

The lack of competition inherent in a monopoly has led some to suggest that a free-market approach would have positive effects on education. In most other economic arenas, the public is comfortable with market competition, but when it comes to education, the matter of consumer choice has not been resolved. According to Coulson (1999), little direct evidence of free-market effects on efficiency or achievement in public schools exists because of the absence of a truly competitive educational marketplace.

Proponents of letting parents choose the schools their children attend think that a market approach to reform will engender healthy competition. Some school choice advocates assert that such competition for customers, or students, can serve as a stimulus for innovative practices in traditional district schools. Poorly performing schools either will improve or go out of business (Chubb & Moe, 1990). Further arguments posit that such a system of educational choice provides parents of any means their basic right to join and exit associations (Godwin and Ruderman, 1998).

Opponents of market-driven reform argue that the superiority of the market is not applicable to public schooling for a variety of reasons. First, some parents, especially those in low socioeconomic groups, will not be able to make sound educational choices for their children. Second, racial, ethnic, and social segregation might increase as a result of the exercise of school choice. Another concern relates to the possibility of fraud in schools operating outside the state-run educational system. A fourth criticism is that choice would work against the public benefits of education to society as a whole; that is, effective

participation in a democratic society requires inculcation of a common set of values to produce social, political, and economic benefits for all (Gutmann, 1992).

School choice supporters have addressed the criticisms. Parents in low socioeconomic groups have been among the most passionate in their demands to give their children the right to exit low-performing schools, especially in urban areas (Kemerer, 1996). Others have observed that the public schools in America are already segregated to a greater degree than private schools (Coleman, 1990; Bonilla, 1997) or that such a notion is not, in and of itself, a detriment to effective education for minority students (Bell, 1987). The possibility of fraud within schools of choice certainly exists; unfortunately, there are abundant examples in conventional public school systems across the country. Finally, the role of the state is to protect individual rights, including the right to exit in order to protect diversity of parents' beliefs about the education and upbringing of their children (Galston, 1995).

In an effort to create a competitive educational marketplace, more than two-thirds of the state legislatures in the nation have recently enacted statutes that provide schooling options. The charter school is one of these options that draws bipartisan support from policymakers because they are publicly funded and "are open to all and are accountable for student learning" (Hassel, 1998). In effect, charter schools "represent a political compromise" (McGree, 1995).

Charter schools are public schools of choice that are created by a contract between the school operators and the granting authority. Statutes vary from state to state regarding who sponsors the charter and to whom it is granted. A charter school may be part or all of an existing school, or it may be self-contained in non school-owned facilities (Medler 1996; McGree, 1995). In contrast to the traditional local school district, charter schools are based on the competition associated with free-market concepts. Customer satisfaction is inherent

in charter school options since parents freely choose the school, and failure of the school to satisfy their consumers most likely will result in the departure of students

The developmental history of the charter school movement in this country spans a period of less than a decade, beginning with the first law passed in 1991 in Minnesota. Since then, the opportunity for public charter schools has rapidly expanded to include statutes enacted in 36 states plus the District of Columbia (Charter School Highlights, 1999).

If consumer choice in an expanded educational marketplace is expected to stimulate competition that improves education, one of the major questions surrounding charter schools is: What are the free-market effects of charter school competition on systemic reform within traditional public schools?

Statement Of The Problem

The purpose of this case study was to examine internal organizational responses that have occurred in a Texas school district since open-enrollment charter schools began operating within its boundaries.

Research Questions

The study looked at the extent of internal organizational changes in one large north Texas public school district resulting from competition with charter schools. Instructional programs, finance, communication, and leadership were the focus areas of the research that addressed the following questions:

1. How have instructional programs in the traditional public school district been affected by competition from charter schools in the district?
2. How have the finances of the traditional public school district been impacted by students leaving the district to attend charter schools in the district?
3. What communication strategies have been undertaken by the district to inform the community about the school district?

4. Does the perception exist that the pool of leaders in the school district has diminished as a result of the exit of students and parents to charter schools?

This dissertation contains five chapters presented as follows:

Chapter 1 includes an introduction to the dissertation, along with a statement of the problem and the research questions.

Chapter 2 contains a review of related literature and research in the area of school choice, especially charter schools, and the free-market effects of competition in the educational marketplace. The significance of the study is also discussed in this chapter.

Chapter 3 describes the research methodology. This includes the research hypotheses, along with procedures used for collection and analysis of data, and definitions that were pertinent to the study.

Chapter 4 presents the findings of the study, along with limitations of the study.

Chapter 5 discusses conclusions and possible implications of the findings.

CHAPTER TWO

REVIEW OF RELATED LITERATURE

Introduction

School choice options increased dramatically during the last decade of the twentieth century, and most of the literature related to charter schools was written during this period. However, the theoretical underpinnings of school choice are found in established economic theory, particularly those associated with a competitive marketplace. Individuals who espouse school choice options cite marketplace theory as a viable solution to public school woes. The premise is that such an approach will improve the public education system through the introduction of free-market principles. Charter schools have been viewed as an option that has the potential to improve public schools by introducing competitive elements missing from traditional public school operations.

Economic Theory and the Educational Marketplace

The classic definition of the market is a “collection of buyers and sellers that interact, resulting in the possibility for exchange” (Pindyck & Rubinfeld, 1992, p. 11). Multiple buyers and sellers are essential in order that no single buyer or seller can control prices. Theoretically, an unregulated competitive market leads to the most economically efficient output level.

According to the assumptions of free-market theory, marketplace discipline is “the ultimate form of accountability” (Gerstner et al., 1994, p. 21) because active interplay of supply and demand will reward successes and punish failures. Lessons learned from responses of American business management to changing market forces have produced

organizational ideas such as listening to customers, decentralized decision-making, measuring performance, and continuous improvement.

Economist Milton Friedman (1955) is generally credited with planting the seed of an educational marketplace based on free-market theory and a belief that less government is better. Maranto, Milliman, and Hess (1998) concurred that “the market model assumes that school districts will respond to competition by seeking to improve the efficiency and quality of the education they offer” (p. 2).

Moe (1992) further posited that the public sector is too large, and that many government functions would be better served if allowed to respond to market dynamics. However, given the distinctive characteristics of the public and private sectors, Moe concluded that the best approach would be a “first class public sector” (p. 547) in which people choose to educate their children.

In their book Politics, Markets, and America’s Schools Chubb and Moe (1990) offered a marketplace model for public schools that holds organizational autonomy as the key variable in school improvement. Coulson (1999) concurred that lack of autonomy explains why so few public schools perform well because they rarely have freedom from outside interference in making decisions.

Applied to education, the market hypothesis presumes that schools would be forced to move beyond limitations imposed by bureaucracy and unions because of competitive pressures. Consumer demand among an adequate supply of schools would stimulate competition to encourage innovation and responsiveness, resulting in improved educational outcomes for students in all schools.

However, public schools have not been compelled to change because historically they have operated outside the full play of the market as, essentially, the sole provider of educational services for students in elementary and secondary education. With

approximately 90% of the nation's schoolchildren attending public schools, some have concluded that the public educational system has been unresponsive since it is a monopoly (Coulson, 1999; Gerstner et al., 1994). Gerstner (1994) acknowledges that while public education could never be a perfect market, it should be based on an economic model rather than the present political model in which "social and political processes conspire to force schools to the lowest common denominator" (p. 26). He thinks that such a political model has compromised educational opportunities in America for all students, resulting in inadequate preparation for modern democracy.

Perceptions of Student Achievement

Among the criticisms aimed at the nation's public schools are inefficient management, poor student outcomes, and unresponsiveness to stakeholders. Critics charge that taxpayer dollars are being spent to support educational bureaucracies rather than student achievement (Boaz, 1991; Coulson, 1999; Kirkpatrick, 1998; Murphy, 1996).

Numerous studies described problems related to student achievement. Evidence of a decline or stagnation in student achievement since 1970 can be found in five reliable tests that cover a comprehensive range of academic subjects: the National Assessment of Educational Progress (NAEP), the International Evaluation of Education Achievement (IEA), the Young Adult Literacy Survey (YALS), the National Adult Literacy Survey (NALS), and the International Adult Literacy Survey (IALS) (Coulson, 1999). The Third International Mathematics and Science Study (TIMSS) ranks twelfth graders from the United States among the lowest of the 21 participating countries in mathematics and science general knowledge, physics, and advanced mathematics (Pursuing Excellence, 1998).

Extensive media coverage of these concerns has contributed to a decline in confidence in the nation's public schools. Only 18% of respondents in the most recent Phi Delta Kappa/Gallup Poll gave a grade of "A" or "B" to the public schools as a whole. This

percentage is down from 22% in 1997. At the same time, the percentage of respondents who are willing to approve government financial aid to fully fund students attending nonpublic schools increased from 24% in favor and 74% opposed in 1993 to 44% in favor and 50% opposed in 1998. A higher percentage (52% in favor and 41% opposed) supported the notion of only part of the tuition being paid (Rose, Gallup, & Elam, 1998).

Educational Choice Options

Figure 1 shows educational choice options along a continuum related to the degree of centralized control. Possibilities range from the centralized bureaucratic control found in traditional public schools, to a somewhat lesser amount of control with private services contracts, to greater independence in public charter programs or schools, and finally, to the highest degree of autonomy with vouchers that may be used at either private or home schools.

Figure 1

Continuum of Control

MORE Centralized	Centralized
Public School attendance zone intradistrict transfer interdistrict transfer	Private Contract trash collection lawn maintenance food service educational service management

Emergence of the Charter School Concept

Charter schools represent one of the more autonomous variations of school choice options. They are free from most local and state education regulations, but they operate under a contract and are held accountable for achieving outcomes in student performance or other specified areas. One of the nation's early charter school proponents, Ted Kolderie (1994) argues that this particular form of public school choice has the potential to

simultaneously provide “dramatically different schools . . . and incentives for districts to follow with changes in their own schools.” Another well-known charter school supporter, Joe Nathan (1996) explains that students who remain in traditional schools benefit as well as students in charter schools because of the “ripple effects” created through reexamination of educational practices (p. 90).

Educator Ray Budde is considered to be the founder of the charter concept in the United States when he suggested chartering all schools in his 1988 book, Education by Charter: Restructuring School Districts. “It is the ‘factory model’ school district which needs to be replaced by a services-oriented infrastructure--and chartering all schools is a vehicle for making this happen” (R. Budde, personal communication, February 12, 1997). For educational entrepreneurs who are interested in systemic change within public schools, Nathan (1996) points out that charter schools have emerged as a viable alternative because they are unique among school choice options in applying the “principles of opportunity, freedom and accountability,” (p. 11). Perhaps the most important distinction of public charter schools is that parents freely choose them for their children (Bonsteel & Bonilla, 1997).

Development of Charter School Laws

Since the first charter school law passed during 1991 in Minnesota, a total of 36 states and the District of Columbia have charter laws as of September 1999, and the charter school movement has been rapidly expanding. As indicated in Table 1, of these 37 charter laws in the United States, nearly 1700 charter schools educating over 350,000 pupils existed in 27 states by 1999 (Charter School Highlights, 1999).

Bierlein and Mulholland (1994) attribute this rapid development to charter features such as: (a) guaranteed results, (b) public school entity, (c) more educational options, (d) true decentralization, and (e) market-driven customer satisfaction. Guaranteed results

Table 1

Development of Charter School Laws in the United States

Year Law Enacted	State
1991	1 Minnesota
1992	2 California
1993	3 Colorado
	4 Georgia
	5 Massachusetts
	6 New Mexico
	7 Wisconsin
1994	8 Arizona
	9 Hawaii
	10 Kansas
	11 Michigan
1995	12 Alaska
	13 Arkansas
	14 Delaware
	15 Louisiana
	16 New Hampshire
	17 New Jersey
	18 Rhode Island
	19 Texas
	20 Wyoming
1996	21 Connecticut
	22 Florida
	23 Illinois
	24 North Carolina
	25 South Carolina
	26 District of Columbia
1997	27 Mississippi
	28 Nevada
	29 Ohio
	30 Pennsylvania
1998	31 Utah
	32 Idaho
	33 Virginia
	34 New York
	35 Missouri
1999	36 Oklahoma
	37 Oregon

assure parents and students that they will get what the charter school claims to offer.

Charter schools are considered a public school, albeit nontraditional, and taxpayer dollars remain in the public sector. Educational options include the possibility of innovative

or specialized curricula and programs, while true decentralization allows site-based participation by parents and teachers. Customer satisfaction is integral to charter schools because those that do not provide programs that satisfy parents and children will lose students to other schools along with the accompanying funding (Cookson & Weiher, 1996). In contrast to the traditionally managed local school district monopoly, charter schools are based on the competition inherent in free-market concepts.

Charter contracts usually are granted for three to five years, but the charter generally remains in effect unless there are material violations (McGree, 1995). In exchange for freedom from most regulations established by the state, the school's accountability lies in its charter contract . For example, educators who work in charter schools as teachers or administrators are generally not required to have state certification, or meet any other specific educational requirements. Generally, the contract specifies the (a) instructional plan, (b) educational results and how they will be measured, (c) management or governance plan, and (d) financial plan (Hill, 1996).

Advantages of charter schools have been identified as the (a) ability of the consumer, or parent, to choose a public school setting that better serves their particular family, (b) increased consumer satisfaction in making a deliberate choice for their child's school, (c) increased parent participation, (d) development of innovative educational practices, (e) higher income-earning opportunities for outstanding teachers with particular expertise, and (f) academic and psychological benefits for students (Broderick, 1995; Finn, Bierlein, & Manno, 1996; McGree, 1995; Taebel et al., 1997, Taebel et al., 1998).

Potential disadvantages that have surfaced include concerns about (a) resegregation of schools, (b) unscrupulous business or academic practices that may go undetected for a period of time, (c) inconsistent curriculum throughout the United States, (d) underutilization of existing public school buildings, and (e) taxpayer abandonment of a commitment to

traditional public schools (Broderick, 1995; Finn, Bierlein, & Manno, 1996; McGree, 1995; Taebel et al., 1997; Taebel et al., 1998).

Each charter law is unique, and statutes vary from state to state regarding whether sponsors of charters are either local school boards or state boards of education, with the majority of states requiring local board approval. Charters may be granted to teachers, parents, universities, community members, business leaders, and other interested groups. A charter school may be part or all of an existing school, or it may be self-contained in non school-owned facilities (Medler 1996; McGree, 1995).

Strength of State Statutes

Stronger state statutes are those that grant greater autonomy to charter school operators and are considered closer to a true charter concept because of greater potential impact on systemic improvement for all public schools. Other terms used to indicate a strong law are “live, effective, expansive, and progressive,” while weak laws are also termed “dead, restrictive, or ineffective” (Charter School Legislation, 1998).

Significant criteria have been identified to determine the strength of the state statutes, that is, the degree to which the charter schools are likely to challenge the status quo educational system. These include (a) who grants the charter, (b) who sponsors the charter, (c) how the charter can be formed, (d) exemptions from laws, rules, and policies, (e) fiscal autonomy, (f) legal autonomy, (g) maximum number and variety of charters, and (h) personnel qualifications. All of these components center around two essential qualities for charter school viability: autonomy and choice (Bierlein & Mulholland, 1994; Bierlein, 1995, Buechler, 1996). Each is a critical aspect if the school is going to have the independence necessary to be educationally innovative so that parents and students will have meaningful choices (Cookson and Weiher, 1996).

States with stronger laws tend to have more charter schools. There are exceptions to this pattern, namely New Hampshire, a state that passed strong authorizing statutes in 1995, yet has no charter schools to date; however, Arizona, the state whose laws are ranked first in strength, has 271 charter schools, twice as many as second-ranked Michigan with 138 schools. By contrast, a total of only 42 charter schools exist in the 12 states with weaker charter school statutes (Charter School Highlights, 1999). Table 2 reflects the ranking of state statutes according to their relative strength and provides an accounting of the developmental status of charter schools in each state.

Texas Charter Schools

In comparison to other states, Texas charter laws are ranked in the ninth position, placing them among the strongest in the nation. Senate Bill 1 in 1995 originally authorized charter schools in the state, and 1997 revisions allowed more. Three types of charters are allowed: open-enrollment charters granted by the State Board of Education (SBOE), local campus or program charters granted by a local district board of trustees, and home-rule education districts authorized by local district voters. Considerable autonomy and independence is given to Texas charter schools. For example, charter school teachers and administrators are not required to hold state certification; however, their students are required to take the statewide assessment known as the Texas Assessment of Academic Skills (TAAS), and the schools are rated according to the state's accountability system for all public schools. Charter schools must participate in the state's general Public Education Information Management System (PEIMS). (See Appendix A for overview of requirements).

Open-enrollment charter schools are decidedly more popular than the other two charter options: no home-rule charter districts exist, and only a few dozen local campus charters have been granted by local boards of education across the state. Such rapid

Table 2

Relative Strength of Charter School Laws

Rank	Year Law Passed	State	Number Schools Opened
1	1994	Arizona	348
2	1994	Michigan	175
3	1996	District of Columbia	28
4	1995	Delaware	5
5	1993	Massachusetts	39
6	1991	Minnesota	57
7	1998	New York	3
8	1996	North Carolina	83
9	1995	Texas	168
10	1992	California	234
11	1996	South Carolina	10
12	1993	Colorado	68
13	1996	Florida	112
14	1995	Louisiana	17
15	1998	Missouri	14
16	1997	Pennsylvania	45
17	1995	New Jersey	52
18	1993	Wisconsin	45
19	1995	New Hampshire	0
20	1996	Illinois	19
21	1993	Georgia	32
22	1996	Connecticut	17
23	1997	Ohio	48
24	1998	Idaho	8
25	1998	Utah	8
26	1995	Alaska	18
27	1997	Nevada	5
28	1995	Rhode Island	2
29	1995	Wyoming	0
30	1998	Virginia	0
31	1994	Kansas	15
32	1994	Hawaii	2
33	1993	New Mexico	3
34	1995	Arkansas	0
35	1997	Mississippi	1
	1999	Oklahoma	0
	1999	Oregon	1
		Total	1682

Note. Rankings of 1 to 23 are considered strong to medium strength laws; those ranked 24 to 35 are considered weaker laws. Oklahoma and Oregon passed new laws during 1999 that have not been ranked.

development of open-enrollment charter schools may be attributable to the application process that by-passes local school boards and allows organizers to go directly to the State Board of Education, thus creating new independent school districts that may cross existing district lines. Admission policies of charters granted under this provision are prohibited under Section 12.111.6 of the Texas Education Code (TEC) (1998) from discrimination on the basis of sex, national origin, ethnicity, religion, disability, academic or athletic ability, but a student with a history of discipline problems may be excluded.

Open-enrollment charter schools in Texas receive 100% of state and district operations and maintenance funds from the state according to their Weighted Average Daily Attendance (WADA). Under TEC (1998) Section 12.108, charter schools may not charge additional tuition, although grants and fund-raisers are allowed. State statute authorizes an open-enrollment charter school to

receive tuition from the school district in which a student attending the school resides in an amount equal to the quotient of the tax revenue collected by the school district for maintenance and operations for the school year for which tuition is being paid divided by the sum of the number of students enrolled in the district . . .
including the number of students for whom the district is required to pay tuition.

(TEC §12.107a, 1998)

However, interpretation of this section resulted in the state providing all the money; that is, districts do not receive state funding nor send tuition for charter school students. The amount sent to the charter schools from the state averages slightly over \$4000 per pupil, but since the allotment is based on the amount that the student would have been entitled to receive as a student in their home district, students from different districts generate various allocations. For example, a student who came to a charter school from a wealthy district might generate

\$7000, while one who came from a less-wealthy district only \$3,800. (Brooks Flemister, personal communication, August 23, 1999).

Charter School Research

If the purpose of reinventing public schools as charter schools is systemic improvement, what are the implications of these activities on the future of public education? Luce (1995) argues “charter schools will foster competition within the public school system and thus strengthen it” (p. 92). While this premise was examined as one component of some of the existing charter school research, few empirical studies focus on the secondary effects, or the impact of charter schools on existing public schools.

National Studies

National research reports have focused primarily on charter schools themselves rather than examination of the secondary effects. For example, the first nationwide study of charter schools emanated from the U. S. General Accounting Office (GAO) in January of 1995 and addressed charter school numbers and programming, degree of autonomy, accountability systems, and administration of federal programs.

Alex Medler of the Education Commission of the States and Joe Nathan (1995) of the Center for School Change reported on 110 charter schools in seven states (California, Colorado, Massachusetts, Michigan, Minnesota, New Mexico, and Wisconsin). The survey provided substantial information about some of the nation’s first charter schools in terms of grade levels served, school size and facility type, subject focus or target student population, intra- and interdistrict enrollment, start-up funding and sources, reasons for seeking charter school status, business and community partnerships, contracts for services, teacher qualifications, assessment tools, and technical assistance. Charter schools were most likely to employ an integrated and interdisciplinary curriculum, followed by a focus on technology

and a back-to-basics approach. Charter school operators reported difficulties with aspects of business management, including capital funding and facilities, credit and cash flow.

Hassel (1999) traced the implementation of charter school programs in four states: Colorado, Georgia, Massachusetts, and Michigan during 1995-96. He found districts respond to charter schools within a wide range of responses, some of which may not result in improved public education. He cites examples of negative responses: (1) litigation challenging charter laws, (2) subsequent legislation restricting charter schools, (3) tactics undermining the charter schools, (4) threats to cut back popular programs, and (5) peaceful coexistence due to benefits to the local district, such as education of “undesirable” students (p. 138).

Other research studies have suggested the effects of charter schools are beneficial to traditional public schools. Through the Educational Excellence Network at The Hudson Institute, Bruce Manno, Chester Finn, Louann Bierlein, and Gregg Vanourek (1998, pp. 497-498) conducted a two-year study of 35 charter schools in Arizona, California, Colorado, Massachusetts, Michigan, and Minnesota. Five features were noted in order to restructure public education: (1) consumer-oriented institutions; (2) diverse institutions; (3) accountable, result-oriented institutions; (4) professional institutions; and (5) voluntary, mediating institution with an emphasis on intimacy and mission. Anecdotal evidence was provided that marketplace competition can produce significant changes in curriculum or discipline and a “heightened entrepreneurship on the part of the ‘regular’ schools” (Vanourek et al., 1997, p. 11).

Mark Buechler (1996) cited early evidence of charter school effects on other schools as part of his report, Charter Schools: Legislation and Results After Four Years. In a comparison of charter school legislation in 19 states and 226 charter schools as to whether charter schools will succeed in increasing student achievement, conclusions drawn

are: (a) most charter schools are small and most serve elementary populations; (b) charter school populations are representative of public schools overall; (c) educational approaches include interdisciplinary instruction, increased technology and parental involvement, and use of performance assessments, including portfolios; (d) lack of funds and business expertise are the most significant barriers; (e) some charter schools require parents to promise a certain degree of involvement; (f) the public school system in general has not been affected very much; and (g) the ability of charter schools to improve student achievement has not been shown to date. Recommendations made to state legislatures were to consider risks and defeat charter school legislation, or pass the legislation if it appears that possible benefits outweigh the risks.

Marc Dean Millot (1995) conducted four different studies for the Rand Corporation from which he derived an analysis of types of school choices in light of the balance of autonomy and accountability: (a) traditional schools (low accountability, low autonomy); vouchers and home-schooling (low accountability, higher autonomy); (b) state standards and assessments (high accountability, low autonomy); (c) site-based management (higher accountability, higher autonomy but still restricted); and (d) charter schools (balanced autonomy and accountability). Millot categorized existing charter school legislation dependent upon the degree of independence: (a) Super Site-Based Management (New Mexico, Georgia); (b) Contract Schools (most states); and (c) Independent Public Schools (Massachusetts, Arizona).

RPP International is under contract for a comprehensive four-year study of all charter schools for the U. S. Department of Education. The First, Second, and Third Year Reports of A Study of Charter Schools described existing charter schools, while the Fourth Report will look at the potential effects on the American public education system. The first year charter school study reported that most charter schools are small and diverse, but that each

state's approach to charter schools is distinctive, a feature that profoundly affects the potential impact on the public school system (A Study of Charter Schools: First Year Report, 1997). The second year report found that 20% of the charter schools served a population in which almost all students were children of color, economically disadvantaged, or students with disabilities (A Study of Charter Schools: Second Year Report, 1998). The third study found that most charter schools opening during 1997-98 were more likely to be newly created, small schools than in prior years. The median enrollment of all charter schools is around 132 students per school, compared to 149 students in 1996-97 (A Study of Charter Schools: Third Year Report, 1999).

A recent progress report from the Center for Education Reform indicates that charter schools are accelerating systemic improvement for public schools. Ripple effects in school districts were the result of heightened sensitivity to parental and community concerns that appeared to be the result of charter school existence (Charter Schools: A Progress Report, 1999).

In the first, and perhaps the only, major national study focused on district responses, Rofes (1998) found evidence that almost half of 25 districts in eight states (Arizona, California, Colorado, Georgia, Massachusetts, Michigan, Minnesota, and Wisconsin) and Washington, D. C. reported strong or moderate impact from charter schools; conversely, slightly more than half experienced little or no impact. Rofes noted that suburban, rural and small urban districts were more impacted than large, urban districts, but he points out the complexity of attributing changes in the district to charters due to simultaneous internal reform efforts.

Statewide Evaluations

A proliferation of statewide evaluations of charter schools has contributed to the literature on charter schools as well. Authorized by state legislatures and state boards of

education, notable reports have emanated from Minnesota, Arizona, Massachusetts, and Texas.

Minnesota

The Minnesota Legislature was the first in the nation to enact charter school laws in 1991, and the evaluation stemming from that legislation served as an initial model for other state evaluations to follow. While focused almost exclusively on the charter schools in the state, the [Minnesota Charter Schools Evaluation Report](#) (Lange, Lehr, Seppanen, & Sinclair, 1997) raised important questions about the likelihood that charter schools will improve public schools due to the challenges of startup and maintenance.

Arizona

A quantitative analysis of survey data of teachers' perceptions of the effects of charter schools found significantly more school-level innovations in Arizona than in Nevada in a comparison of strong and weak laws. Schools strongly affected by charters were more likely than less-affected schools to adopt higher-cost reforms. Responses included magnet programs, advertising, outreach to parents, phonics approaches to teaching reading, and all-day kindergarten. The report also described negative responses to competition such as threats to cut extracurricular activities and other popular programs; intimidation, slander, and harassment of charter schools and personnel; and failure to provide student records (Maranto, Milliman, & Hess, 1998).

Massachusetts

The Massachusetts statewide study in 1998 found that both charter school and district respondents reported that district schools have begun initiatives in the last two to three years such as intradistrict school choice, class size reduction, uniforms, after school programs, performing arts programs, and alternative middle and high schools. Perspectives of the respondents differed on whether such innovative practices could be attributed to charter

school activity, but overall the educational effects were considered to be positive or neutral (Rosenblum & Brigham, 1998).

Texas

Required by state statute and authorized by the State Board of Education, the Texas Open-Enrollment Charter Schools: Year One Evaluation (Taebel et al., 1997) found that the originally authorized Texas open-enrollment charter schools, 17 of which opened during 1996-97, have had little perceptible effect on traditional education, according to district central office officials. Several factors may account for this perception: small numbers of charter schools; small numbers of students leaving neighborhood schools to attend charter schools; growth in Texas school district enrollments; lack of mechanisms for systematic tracking of student attrition; absence of direct financial burden on public school districts during the charter schools' initial year.

The Texas Open-Enrollment Charter Schools: Year Two Evaluation (Taebel et al., 1998) also reported minimal effects of the 19 charter schools opened by 1997-98 as reported by district central office officials in terms of funding, student or teacher attrition, parental involvement, and programmatic changes. A key distinction in the second year evaluation, however, is the observation that the perceptions of district officials appear to be relative to the number and proximity of charter schools in the area.

The impact of charter schools more likely will be felt by some Texas public school districts as enrollment in existing charter schools grows. Table 3 reflects the rate of growth of the student population in the second year of operation for the first generation of Texas open-enrollment charter schools; thirteen of the seventeen charter schools had increases ranging from slightly over 7% to 217%, while four had decreases ranging from 5% to 12%. The percentage increase in student enrollment for all schools from the first to the second year was 46.6% (Flemister, 1997).

Table 3

Growth of Texas Open-Enrollment Charter Schools

OPEN ENROLLMENT CHARTER SCHOOLS Year Two Growth			
SCHOOL	1996-97 Final Population	1997-98 Initial Population	Difference
Acad of Trans Studies	196	173	- 12%
Am Inst of Learning	92	177	+ 92%
Blessed Sacrament	136	170	+ 25%
Building Alternatives	99	94	- 5%
Dallas Can!	269	535	+ 99%
Girls and Boys Prep	241	352	+ 46%
Medical Center	123	165	+ 34%
One-Stop Multiservice	117	110	- 6%
Renaissance	298	647	+217%
George I. Sanchez	384	342	- 11%
Seashore Academy	62	110	+ 77%
SER-Ninos	155	222	+ 43%
TX Acad of Excellence	50	95	+ 90%
U of Houston Tech	20	40	+100%
Waco Charter	62	152	+145%
West Houston	96	103	+ 7.3%
Raul Yzaguirre	98	176	+ 80%
TOTALS	2,498	3,663	+46.6%
Year-One Initial Population			
North Hills	NA	214	
Pegasus	NA	95	

The impact of charter schools in Texas will also become more evident as the number of schools increases. Twenty open-enrollment charters were originally authorized in 1995, and one hundred more were allowed in 1997 legislation, with no cap on the number of charters that declare they will educate a population of at least 75% at-risk students. The Charter Schools Division of the Texas Education Agency (TEA) has grouped open-enrollment schools into three different generations, according to which year the charter was granted. As of March 1999, 59%, or 170 charters out of 287 applications had been approved by the SBOE: 20 first generation charter schools granted in 1996; 41 second generation

charter schools granted in March of 1998; and three phases of third generation charter schools granted in 1998-99: 85 in September, 30 in November, and nine in March. Of those charter schools that have been authorized, 88 are operational, educating approximately 12,000 students, or less than 1% of the state's nearly four million pupils. The remaining 80 approved schools are scheduled to open during 1999 or 2000. One of the original 20 approved first generation charters has been revoked by the SBOE, leaving 19 first generation Texas open-enrollment charter schools in their second or third year of operation during 1998-99 (Flemister, 1999).

Charter schools in Texas can be classified at serving either at-risk or non at-risk students, which, according to Taebel et al. (1997) has implications for competitive pressure on traditional public schools. One distinction between at-risk and non at-risk schools can be found in the charter application mission statement defining academic expectations for the students in the school. Charter schools serving primarily at-risk students are those schools that "see their central role as providing students a second chance" (Taebel et al., 1997, p. 20) after they have failed traditional schools. Another indication of the classification of charter schools is the socioeconomic status of parents of the students attending the school (Taebel et al., 1997; Taebel et al., 1998).

Significance of the Study

The subject of this research was timely since charter school laws are still being written or revised and implemented across the nation. According to free-market economic theory, consumer choice among schools will stimulate competition to encourage innovation and responsiveness to consumers, resulting in improved educational outcomes for students in all schools. Serving slightly over 300,000 pupils, charter school enrollment nationwide represents an insignificant percentage of the nation's 52 million students enrolled in public schools (Gerald, 1998). If charter schools have the potential to serve as a catalyst for

systemic reform, the important question lies in determining the responses of traditional school districts to their presence.

The findings will contribute to the body of knowledge about free-market effects of charter schools on traditional public schools. In particular, the study will look at the impact of the charter school operations on the district's instructional programs, finances, communication strategies, and student and parent leadership. While many have speculated as to the competitive effects of public charter schools on systemic reform of the entire educational system, much of the debate has been along ideological lines, and much of the research has been very general. Little empirical evidence exists that addresses this issue in depth; therefore, this exploratory research effort will help to develop research questions for future studies.

Conclusion

Increasingly traditional public schools in Texas and across the nation are faced with competition from public charter schools and other forms of school choice. The review of the literature focused on responses of public schools to charter school competition in the context of the educational marketplace.

All but one of the reviewed studies approached their research from the perspective of examination of the charter schools. Numerous examples were cited in which charter schools filled a niche in the market; that is, the existence of the charter school provided an option for parents seeking a specific type of educational approach for their child. Most of the charter schools were small, and regardless of the size of the pupil population of the state, the number of students served in charter schools is proportionately small.

Will this environment systemically reform existing public schools? The theory of the marketplace surfaced as the underlying postulate in this review of the literature related to school choice and charter schools. This theory provides the basis for answering the question

with the assumption that competitive responses in an educational marketplace will lead to improved public schools for all students.

In summary, the review of the literature supports the notion that research on the competitive responses of charter schools is incomplete. While some studies examined district responses to charter schools as part of their research on charter schools, more research on the secondary effects of charter school competition is needed. The lack of empirical research is due primarily to the relatively brief existence of charter schools, but research is beginning to emerge. The research conducted for this study was focused exclusively on the free-market effects of charter school competition. The next section, Chapter 3, describes the methodology used in the study.

CHAPTER THREE

METHODOLOGY

The purpose of this case study was to investigate whether internal organizational changes have occurred in a school district due to the opening of two open-enrollment charter schools within its boundaries. The dissertation was guided by four broad research questions related to the effects of charter schools on traditional public school districts. Both quantitative and qualitative research was conducted in order to present a comprehensive case study of the effects of open-enrollment charter schools on one large north Texas school district. The case study method was appropriate to address the questions of this research because according to Miles and Huberman (1994), the case is a “phenomenon of some sort occurring in a bounded context” (p. 25).

Research Hypotheses

The following hypotheses were tested in the study of district effects.

H1. The instructional programs available in the district have not been affected as a result of the opening of charter schools in the district.

H2a. The state funding of the district has not been affected because of students enrolling in charter schools.

H2b. Long-range plans for capital improvements in the district were not impacted by the existence of charter schools.

H2c. Class size or personnel have not been affected by changes in enrollment due to students leaving to attend charter schools.

H3. Communication strategies undertaken by the district have not been affected because of charter schools.

H4. The perception does not exist that the pool of leaders in the district has diminished as a result of the exit of students and parents to charter schools.

Definition Of Terms

The following terms were defined as they relate to this study.

Attendance-Zone Public School: A traditional public school restricted to student enrollment from a particular geographic area within the school district, funded through local, state, and federal dollars; governed by a locally elected board of trustees and mandated to comply with local, state, and federal statutes and regulations.

Charter School: Independent, largely unregulated public choice school created by educators, parents, or entrepreneurs that is authorized to operate under a contract with the granting authority, such as a state education agency, local school board, or university, to receive a portion or all of the per-pupil public funds allocated toward education.

International Baccalaureate (IB): Based in Switzerland, an international secondary school program of study consisting of a comprehensive system of courses and exams that focus on the development of an academically rigorous liberal arts education, which may be recognized for semester credit hours at the university level.

Campus or Program Charter: Type of charter available under Texas Senate Bill 1 (1995) that is granted by the local school district board of trustees to create an autonomous campus or program (Appendix A).

Open-Enrollment Charter: Type of charter available under Texas Senate Bill 1 (1995) that is granted by the State Board of Education (SBOE) to create a new independent school district within or across district lines (Appendix A).

At-risk Charter School: School whose charter application mission statement indicated its intent to provide a second chance to students who have not been successful in traditional public schools.

Non At-risk Charter School: School whose charter application mission statement indicated its intent is to serve traditional public school students. In some cases, this population is served through a marketplace niche such as an International Baccalaureate program, a back to basics approach, or through an integrated thematic curriculum.

Weighted Average Daily Attendance (WADA): Method used to calculate state school aid in Texas that is based on the average number of students in attendance for each day of the school year times the basic allotment per pupil, with added weights for students requiring special services.

The Schools

The Traditional Public School District

The Irving Independent School District (Irving ISD or IISD) was selected for the study because it is the only school district in Texas that has two academically competitive charter schools in continuous operation for at least two years at the time of this research (1999). Located west of Dallas near the Dallas-Fort Worth International Airport, Irving ISD annually educates approximately 28,000 students, ranking it among the larger districts in the state. District statistics reflect an increase of almost 500 students in 1998-99, along with an increasing proportion of minority ethnic groups. Students who are white were the majority population in the district some ten years ago; they comprised 38% in 1998-99. The breakdown of the district's minority student population is 42% Hispanic, 13.3% African-American, 6% Asian, and 0.7% American Indian. Half of the district's students are considered economically disadvantaged, as determined by their eligibility for the free and reduced federal lunch program. Slightly more than 2% of the total number of students in the IISD attend the charter schools in the district.

Although the majority of the charter schools in Texas serve at-risk students, the two charter schools within Irving ISD serve over 1000 regular students primarily considered non

at-risk. Table 4 indicates that 628 of the 1140 students, or 55%, of the charter school (CS) student population in 1998-99 came from the Irving ISD. The remainder of the charter school students came from other area districts. As shown in Table 4, a larger number (420) of students at Renaissance Charter School (RCS) came from IISD than the number (208) that attend North Hills Charter School (NHCS). However, a larger percentage (60.8%) of the NHCS students came from IISD than the percentage (52.6%) of IISD students at RCS (Jones, 1999; Perlmeter, 1999a).

Table 4

School District Students in Attendance at Charter Schools 1998-99

Grade	3	4	5	6	7	8	9	10	11	12	Total
RCS	2	24	22	39	53	48	143	210	150	107	798
IISD	1	17	11	23	30	27	76	124	64	47	420
% IISD	50.0	70.8	50.0	58.9	56.6	56.3	53.1	59.0	42.7	43.9	52.6
NHCS	0	0	67	99	90	51	35	0	0	0	342
IISD	0	0	33	69	57	33	16	0	0	0	208
% IISD	0.0	0.0	49.3	69.7	63.3	64.7	45.7	0.0	0.0	0.0	60.8
Total CS	2	24	89	138	143	99	178	210	150	107	1140
Total IISD	1	17	44	92	87	60	92	124	64	47	628
Total % IISD	50.0	40.0	49.4	66.7	60.8	60.6	51.7	59.0	42.7	43.9	55.1

Note: All percentages do not add up to 100% due to rounding.

Extensive media coverage has contributed to consumer awareness of public school choice, and an increasing number of students have left the district to enroll in the two charter schools. The educational choices offered via the two charter schools in the IISD are not yet available in other Texas school districts, thus providing a unique setting to examine free-market effects.

The Open-Enrollment Charter Schools in the District

One of the open-enrollment charter schools in the district opened its doors in the fall of 1996, followed by the second charter school a year later, and each has seen an increase in enrollment during subsequent years of operation. Both of the charter schools in this study

are located in the more affluent northern area of the city of Irving and require students to wear uniforms. As newly created charter schools, they experienced some of the classic start-up challenges in terms of facilities, funds, and personnel, as well as legal issues pertaining to student discipline and special education. In comparison to other Texas charter school student populations, the two schools are larger than average and serve a student population that is considered primarily non at-risk. Over 90% of the students in the charter schools were in the secondary level (grades 6-12), and a total of 566 secondary students from IISD were enrolled in the charter schools, a figure that represents slightly less than 5% of the enrollment of 12,066 secondary students enrolled in the district (See Table 5).

Table 5

Percentage of District Secondary Students in Charter Schools

Grade	6	7	8	9	10	11	12	Total
IISD CS	92	87	60	92	124	64	47	566
IISD	1939	1978	1929	2074	1614	1254	1278	12,066
%	14.7	13.9	9.6	14.7	19.7	10.2	7.5	4.7

Renaissance Charter School

The first school to be granted a charter from the Texas State Board of Education in February of 1996, Renaissance Charter School opened with almost 300 students in the Fall of 1996 amidst a flurry of media activity. During the previous year, the charter school founders and local school officials had discussed the possibility of creating a local campus charter, but they were unable to reach agreement over the degree of autonomy that would be granted to charter school operators. The school offers a broad curriculum with a technology focus aimed at the average student, or the “forgotten half” as described by the charter school founder and head administrator, who is a former teacher in IISD. University Interscholastic League (UIL) basketball and volleyball are offered, along with intramural sports, as well as band and theater.

Renaissance Charter School served approximately 800 fourth through twelfth graders in its third year of operation. Student ethnicity that same year consisted of 12% African-American, 10% Asian, 13% Hispanic, and 65% White. The female to male ratio was 46% to 54%, while 37% were economically disadvantaged and 33% were considered at-risk. Three campuses were added in separate locations to serve students needing alternative approaches. The first graduating class in the Spring of 1999 included a National Merit Scholarship winner and students with SAT scores above state and national averages (D. Jones, personal communication, June 17, 1999).

North Hills Charter School

The second charter school in Irving opened quietly with 218 pupils in the Fall of 1997 after receiving its open enrollment charter from the State Board of Education in April of 1996. With over 80% of the students returning the second year, new enrollees brought the total population at North Hills Charter School to over 300 pupils. In 1998-99, the ethnic composition of the student population was 12.3% African-American, 13.6% Asian, 8.4% Hispanic, and 65.5% White. The female to male ratio was 60% to 40%. Students receiving special education services made up 2.5% and Gifted and Talented (GT) programs served 3.3% while no students were considered to have limited English proficiency (Perlmeter, 1999b)

According to North Hills officials, a pre-admission conference is conducted with students seeking enrollment in the school, but admission is not denied to any student. The school's executive director in 1999-2000 is an attorney who was one of the school's founders and a former member of its board of directors. Last year, extracurricular activities were offered in basketball, track, and tennis; volleyball and golf are being considered. North Hills has cocurricular foreign language and travel clubs as well. Anticipating International Baccalaureate (IB) status for their academically rigorous high school program within the

upcoming year, North Hills is currently offering grades five through ten and plans to add one higher grade in each of the next two years. They also plan to seek IB approval for the middle school program upon completion of the high school approval process.

Research Methodology

Quantitative and qualitative research methods were used to examine the research questions in depth and to triangulate data. This research project was approved by University of North Texas Institutional Review Board prior to beginning the study, and written permission on an informed consent form (See Appendix E) was obtained from all of the participants in the study.

Interviews

Qualitative data were gathered through individual personal interviews with school officials and structured focus group interviews with teachers in the traditional public school district. A total of 26 individuals from the school district and the charter schools were consulted, resulting in approximately 30 hours of taped interviews.

The data from these participants who were interviewed individually were categorized as either School Officials or Teachers. Those considered school officials were 15 individuals who held positions of authority in the traditional school district; that is, six key central office and four campus administrators, as well as three selected school board members and two retired board members. Eight teachers from the traditional public school district were interviewed in a one-hour structured focus group.

Three additional interviews were conducted with charter school officials to obtain data on the resident school district of charter school students and other follow-up information. No surveys were conducted with this group.

The school official questionnaire protocol (Appendix B)was developed and validated as part of a pilot study conducted during the fall of 1998 for an independent research project

in another public school district in south central Texas. In the pilot study, two school district central office officials, as well as seven charter school officials, were interviewed extensively about the district's responses to the charter school located in the district. Some of the questions were taken from survey instruments used in the Texas First and Second Year Evaluations (Taebel et al., 1997; 1998). Participants were asked to describe changes that have occurred in the last two years or those that are planned for the next two years in instructional programs. Questions were also posed about financial implications, communication efforts, and leadership effects.

Surveys

Quantitative techniques involved statistical analysis of survey instrument responses from a purposive sample of teachers and parents. Surveys were sent to 159 teachers and 1576 parents in the school district to obtain responses to questions related to the impact of charter schools in the district. Questions were developed that focused on the four broad research questions: instructional responses, financial impact, leadership effects, and communication strategies.

District Teachers

The questions used on the teacher survey instrument (Appendix B) were validated in a pilot study conducted in the fall of 1998 as part of a qualitative research class project. In that study ten teachers completed the survey and participated in interviews examining teacher perceptions of charter schools.

The teacher survey (Appendix C) with a cover letter explaining the research project and a stamped, addressed return envelope was distributed during the last week of the 1998-99 school year to all 159 teachers in one district high school. A list of the teachers' names was obtained from the principal of the campus, and they represented both residents and non residents of Irving ISD. Fifteen responses were received from the initial request; the second

request mailed two weeks later increased the number of responses to 38, for a 24% survey return rate.

District Parents

The design of the parent survey was modified from the teacher survey to determine much of the same information about the effects of charter schools. A written questionnaire (Appendix D) with a cover letter explaining the project and an enclosed self-addressed stamped envelope was mailed to a stratified random sample of 1576 school district parents who have children in the sixth through twelfth grades. Table 6 illustrates the method by which the number of surveys sent to parents in each grade level was determined by the percentage of charter school students from Irving ISD in that particular grade. This correlation resulted in the following breakdown of survey distribution: 277 from sixth grade, 283 from seventh grade, 175 from eighth grade, 296 from ninth grade, 322 from tenth grade, 125 from eleventh grade, and 98 from twelfth grade.

Table 6

Stratified Random Sampling Method

Grade	3	4	5	6	7	8	9	10	11	12	Total
IISD CS	1	17	44	92	87	60	92	124	64	47	628
% IISD CS	.1	2.7	7.0	14.7	13.9	9.6	14.7	19.7	10.2	7.5	90.3
IISD				1939	1978	1929	2074	1614	1254	1278	12,066
Random ratio	0	0	0	1/7	1/7	1/11	1/7	1/5	1/10	1/13	
# Surveys a	0	0	0	277	283	175	296	322	125	98	1576

a The percentage of random surveys sent to parents at each grade level was rounded off to the nearest whole number.

The “widely used method of offering the respondent a reward” (Nachmias & Nachmias, 1992) was invoked with an offer of \$2 as a gesture of appreciation to parents returning the survey by the deadline. Follow-up strategies were not undertaken in order to maintain anonymity of school district parents. A typical response rate for a mail survey without follow-up is usually around 20%, but there is no agreed standard for a minimum response rate (Nachmias & Nachmias, 1992). Out of the 1576 surveys that were mailed to parents, 141 were returned, for a return rate of 9%. The highest percentage (13%) return was received from parents whose children were in the eighth grade, followed closely by 11% of ninth grade parents and 10% of tenth grade parents.

The first question asked parents to indicate whether they were aware of the existence of charter schools in the district. Of the 141 surveys returned by parents, 86 (61%) indicated that they were aware of the charter schools and were asked to continue to respond to the questions that followed. However, if the answer to this question was negative, they were instructed to stop at that point and return the survey.

Documents

An analysis was conducted on a range of documents from the school district, local

community, the charter schools, and the state department of education, as well as an extensive personal collection of related newspaper, periodical, and journal articles. To identify possible responses to charter school competition, school district documents that contained information relating to curriculum, attendance, staff development, public relations, and capital improvement programs were examined. School district documents requested by the researcher, and provided willingly by the district, included the most recent Academic Excellence Indicator Systems (AEIS) report, annual financial reports, salary schedules, public relations literature, school bond and capital improvement reports, and high school course offerings. Information related to the home districts of the charter school students was not available through district documents; therefore, these reports were requested and freely provided by the charter schools.

Procedures for Collection of Data

School Official Data

Early in the research process, a preliminary interview was conducted with the superintendent of the traditional district to obtain a letter of permission for the district to participate in the dissertation study. He provided the names of key central office and campus personnel who could provide needed information and respond to questions, and he also indicated that other district personnel could be contacted as determined by the researcher.

The researcher interviewed individuals from the list of names provided by the superintendent, as well as other employees who were selected from the district roster. This group included the superintendent; three assistant superintendents responsible for curriculum and instruction, operations, and personnel; the director of finance and the director of research and development. Four campus principals were interviewed from two high schools, a middle school, and an elementary school. The sample of three current and two retired school board members was selected by the researcher to include those individuals who were involved with

the implementation of charter schools in the district. The interview audiotapes were transcribed, and patterns of school district responses in the areas of curriculum, finance, communication, and leadership were coded and analyzed using ocular scanning.

Teacher Data

Teacher data were obtained from faculty at one district high school in two ways : using a structured focus group interview and a survey. The high school serving ninth through twelfth graders was selected because over half (52% of the 1998-99 charter school population came from this grade group. Eight participants were obtained for the structured focus group interviews from those who volunteered on a request for participation form sent to all 159 teachers at the high school. The structured focus group is considered “ideal for providing the participants with a social, conversational context within which they can generate a range of ideas . . . and engage in dialogue about them (Jackson & Leroy, 1998, p. 16). Teachers who were interviewed in the focus group were drawn from among the 159 teachers who were also sent survey questionnaires.

As shown in Table 7, the 38 district teachers who responded to the survey reflected a broad range of demographic data. Over half (53%) of the responding teachers had one to five years of public school teaching experience, while 24% had twenty-one years or more experience. A master’s degree was held by 53% and a bachelor’s degree by 41%. Most (56%) of the teachers were white (63%) females (56%) over forty years of age (68%) who live in the school district (55%). Of the 13 teachers who had school-age children , over four-fifths (85%) send them to a public school in the district or in another district. The children of the remaining two (15%) teachers attend private school, and none of their children currently attend charter schools.

Table 7

Demographics of Teacher Respondents

N = 38						
Public School	1-5 yrs	6-10 yrs	11-15 yrs	16-20 yrs	21+ yrs	
n=38	(20) 53%	(3) 8%	(3) 78%	(2) 5%	(9) 24%	
Highest Education	High School	Associate	Bachelor's	Master's	Doctoral	
n=37	(0) 0%	(1) 3%	(15) 41%	(20) 54%	(1) 3%	
Age	- 25	25-30	31-40	41-50	51-60	60 +
n=37	(0) 0%	(6) 16%	(6) 16%	(15) 41%	(10) 27%	(0) 0%
Ethnicity	Af-Am	Anglo	As-Am	Hispanic	Native-Am	Other
n=38	(9) 24%	(24) 63%	(1) 3%	(2) 5%	(1) 3%	(1) 3%
Gender	Female	Male				
n=36	(20) 56%	(16) 44%				
Residence	District	Outside				
n=33	(18) 55%	(15) 45%				
Child's School	District Public	Another Public	Charter	Private		
n=13	(6) 46%	(5) 39%	(0) 0%	(2) 15%		

Note. The n varied because some respondents did not answer all questions. Not all response categories add up to 100% due to rounding of percentages.

Parent Data

Input from parents in the district was obtained through the use of a survey questionnaire mailed to a stratified random sample of Irving ISD parents who had children in the sixth through the twelfth grades. The sample was drawn from this population of parents because 566 out of 628 (over 90%) of the students in attendance at the charter schools in 1998-99 came from these grade levels (Table 6).

The parent survey instrument requested opinions regarding their perceptions of the impact of charter schools on public education in the district. Of the 141 respondents, 86

parents (61%) completed the questionnaire beyond the initial question, indicating their awareness of charter schools. Fifty-five parents, or 39%, answered that they were not aware of charter schools in the district. The survey directions were to stop at that point and return the survey; therefore, responses to the questions are given only from parents who were aware of the charter schools.

Table 8 reflects demographics reported by 104 parents completing this section of the survey. Most (69%) of these parents had two (39%) or three (30%) children, and the greatest concentration of their children was at the high school grade level (47%). Nearly all (90%) of their children attend public schools in the district, although 5% of their children attend a charter school and 4% attend a private school.

Table 8

Demographics of Parent Respondents

N = 104					
Children	1	2	3	4	5 +
n=99	(15) 15%	(39) 39%	(30) 30%	(10) 10%	(5) 5%
School Level	Preschool	Elementary	Middle	High	University
n=180	(3) 2%	(26) 14%	(38) 21%	(84) 47%	(26) 14%
Attend School	District Public	Other Public	Charter School	Private School	
n=101	(91) 90%	(1) 1%	(5) 5%	(4) 4%	

Note. The n varied because some respondents did not answer all questions and because some respondents gave multiple responses. Not all response categories add up to 100% due to rounding of percentages.

Procedures for Analysis of Data

As suggested by Merriam for a qualitative study (1998), data were analyzed simultaneously while they were being collected. The data were analyzed using the school district as the primary unit of analysis because the district was the primary entity with control

of the response to the charter school. Questionnaire and interview data were transcribed, coded, and counted according to qualitative techniques outlined by Miles and Huberman (1994). As a means of organizing and summarizing the data, frequency distributions were used in the analysis of the survey responses. Percentages of these responses were computed, followed by an explanation of the findings.

Summary of Methodology

This case study used qualitative and quantitative research methods to investigate perceptions of effects in the instructional programs, finances, communication strategies, and leadership in the district as a result of the exit of students to charter schools. Interviews and surveys were conducted with school officials, teachers, and parents in the district, and pertinent documents were analyzed. The researcher attempted to validate findings from each data source through this multifaceted approach. The findings of the study are reported in Chapter 4.

CHAPTER FOUR

FINDINGS OF THE STUDY

The data were examined to determine if evidence existed that district activities, during the first three years of charter school existence in the district, were linked to free-market effects of charter school competition. The findings from this study were categorized according to the tested research hypotheses related to the impact of charter schools in the areas of instruction, finance, communication, and leadership.

School officials and teachers were interviewed; teachers and parents were surveyed, and pertinent documents were analyzed. For each hypothesis, responses are reported in the same order from the data sources: school officials, teachers, parents, and document analysis.

Based on the evidence found in the data, all of the hypotheses were accepted. Internal organizational changes that have occurred in the district could not be linked directly to charter school competition. Some anecdotal evidence surfaced that appeared to conflict with these findings, but no compelling data were found to show that the effects were due primarily to the existence of the charter schools.

Instructional Programs

H1. The instructional programs available in the district have not been affected as a result of the opening of charter schools in the district. Findings from the study supported H1. Respondents indicated that the district has made numerous changes in the instructional programs, but according to the evidence, these specific changes do not appear to have been heavily influenced by the implementation of charter schools.

The data showed changes in the district included the planned addition of a high school academy and a middle school; a new alternative middle school; technology; new high school courses; programs for Gifted and Talented (GT), bilingual, English as a Second

Language (ESL), special education, early childhood, full-day kindergarten, flexible scheduling, before and after school, tutoring, and dropout prevention.

School Officials

School officials who were interviewed were asked to describe instructional changes that have occurred in the last two years or those planned for the near future. Changes described by district officials were the new high school academy with an International Baccalaureate curriculum; improvements in technology; and enhanced programs for GT, bilingual, ESL, special education, early childhood, and students at-risk. When asked why they perceived those changes had taken place, school officials appeared reluctant to attribute the changes to charter schools, citing other reasons in all instances except the International Baccalaureate program planned for the new high school.

High School Academy

The addition of the new high school academy was mentioned by all thirteen district officials who were interviewed. One board member, who said the new high school will be a “dream come true,” seemed to capture the enthusiasm of school officials for the scope of the \$35 million addition to the district’s options for students. Scheduled to open in the fall of 2001, exact details are still forthcoming, but a technology emphasis and an International Baccalaureate option will overlay six specialization areas: (a) Legal, Public, and Political; (b) Health Services; (c) Advanced Technology; (d) Visual and Graphic Arts; (e) Environmental Sciences and Architecture; and (f) Travel and Tourism. Planned for around 500 students each, Advanced Technology and Health Services are anticipated to be the largest programs, while the remaining three specialization areas will have about 150 students each.

The intent is for students to graduate from their home campuses, but they will have a choice to apply to attend the academy that is to be built on the campus of a local college.

Designed to serve around 2200 students, both full- and part-time, the flexible 12-month program will be open six days a week for both day and night classes, and teachers will have options for a longer work year. Programs for which there is no demand will be modified or dropped; those which are oversubscribed may require a student selection process, or they might be expanded or added to home campuses. No extracurricular activities are being planned at this time.

However, none of the officials perceived that the new school was heavily influenced by charter school competition; rather, that the academy was being planned in an attempt to balance relief for overcrowded high schools with the desire to retain existing attendance zones for each high school. One school official conceded that the charter schools “may have influenced some of our thinking, but it goes beyond them.” Nonetheless, the International Baccalaureate (IB) program being planned as a central feature of the new high school was cited by two officials as due to demonstrated student interest in the charter school with that curriculum.

Technology

Improvements in technology throughout the district were also mentioned by interviewees. As one board member stated, “ . . . we’ve definitely put a lot of money into technology. In our last bond program that we passed two years ago we dedicated probably \$45 million in technology.” The entire district is being wired for wide-area networking with internet access. Technology enhancement includes placement of at least one desktop or laptop computer in each classroom, and teachers who have received training have the benefit of checking out their computer to take home during the academic year and the summer.

Gifted and Talented (GT) Programs

Other major changes in the district’s instructional programs during the last two years include enhancement of the GT curriculum to include more courses and more students,

especially at the elementary and middle school levels. The emphasis has changed from enrichment to acceleration, placing students who complete the program two years ahead in their academic coursework.

Middle School

To accommodate district growth in the south central part of the district a new middle school will be opened in 2001, and a task force has been reexamining the district's middle-school philosophy while looking at adolescent development. Promotion policies also have been reevaluated because, according to one district central office official, "We had a promotion policy that a kid could fail science all the way through middle school and get into high school without passing it and likewise math or reading. We had a major glitch here."

Choice Programs

The district has started two new programs that require an application process for students who have failed the Texas Assessment of Academic Skills (TAAS) or are behind in course credits. Described as a "place where people care," a new self-paced alternative middle school tries to get potential dropouts back on track. Another strategy is the 180 Program where at-risk students in transition from middle to high school are placed with a team of core teachers and take limited coursework in ninth grade. The program was expanded to include tenth grade for the 1999-2000 school year to serve about half of those students who were not ready to leave. Called a "success story" by one district official, the 180 Program is being credited with reducing the freshman failure rate for at least one course down from 50% to 28% last year.

Other Programs

Previously housed in only a few schools, over the past three years bilingual/ESL and special education programs have now been relocated to the student's home campus in the "Going Home Project." Additionally, five early childhood centers will be opened in the Fall

of 1999, and full-day kindergarten is an option in some schools. After-school programs have been added in the district's middle schools.

Starting with one elementary campus three years ago, uniforms are now required for all students in the district's 33 elementary and middle schools. School officials who were interviewed pointed out, however, that the policy has been generated from each individual campus and taken to the school board for approval.

Teachers

Instructional changes identified by teachers in the structured focus group are shown in Table 9, and the teacher survey responses are shown in Table 10. In the discussion that follows both tables are referenced in a comparison of the findings from the teacher data. When asked to identify any instructional changes that had taken place during the last two years, teachers from both groups together most frequently identified the new high school, the 180 Program [high school transition] , technology, and Advanced Placement.

Perceptions held by both groups of teachers as to various reasons for the changes are shown for the focus group in Table 11 and the surveyed teachers in Table 12. The campus Site-Based Decision Making (SBDM) committee, comprised of faculty, administrators, parents, and the community, was the most frequently mentioned reason. A more complete discussion of the changes and the reasons for the changes follows.

When teachers in the focus group were asked to identify name any instructional programs that have been added or deleted in the last two years, Table 9 indicates that an equal percentage (63%) named the new high school academy and the 180 Program as new instructional programs. Table 10 shows the results of the surveyed teachers who were asked to indicate all of the new programs from a list of nine various instructional programs, technology (46%) and Advanced Placement (30%) were selected most often. Over 80% of

those surveyed knew of no deletions that were made to instructional programs during the last two years.

High School Academy

The new high school was not specifically suggested by the interviewer as a possible instructional change in the structured focus group (See Appendix B) or on the survey instrument (See Appendix C). However, five of the eight teachers who were interviewed mentioned that a new high school academy was going to open in “2001 or 2002,” but they did not seem to have much information either about what programs will be housed there. There were concerns expressed about the uncertainty of which programs would be moving to the new school and what effects that might have on the sending campuses.

Neither were surveyed teachers asked specifically about the new high school as an instructional program, but one of the respondents commented, “New school being planned: The Academy.” Another teacher wrote that the new school was being constructed in response to the charter schools,

The charter schools in the proximity of my school district were anticipated to be highly competitive before they opened.. .but now there is no negative effect on our school district. . . Nonetheless, a new kind of high school was created and will be built in reaction to the initial negative thoughts about the [charter] schools.

Technology

Data about technology gleaned from the focus group validated findings in the surveys. When asked why this significant amount of technology enhancement had occurred, one teacher in the focus group stated, “Most of that has been through state mandate.” As shown in Table 9, over a third (38%) of the teachers in the focus group indicated that additions in technology had been made in the district.

An even higher percentage (46%) of survey respondents also recognized additional technology in the district. When asked about future additions planned for the district, the highest percentage of respondents (24%) selected technology; however, twice that percentage (49%) did not know of any planned changes. (Table 10)

Gifted and Talented (GT) Programs

Over a third (38%) of the interviewed teachers also described enhanced GT programs. The high school GT program is more focused on Advanced Placement strategies because, according to one teacher, ‘We wanted to raise scores and see the results and prove it in the longevity of things.’

The second addition most frequently (30%) named by surveyed teachers was the Advanced Placement program. One of the reasons cited for this change was “having enough students to have class make.”

Choice Programs

The 180 Program to assist students in making the transition from middle to high school was not listed as one of the choices on the survey. As shown in Table 9, five of the eight teachers in the structured focus group interview cited this program as a significant addition over the last two years. Described by one teacher as “a lot of extra teacher involvement, extra parent involvement . . . they [the students] didn’t have a chance to fail really,” the 180 Program was expanded last year to include a leadership component. Seven (19%) of the survey respondents listed it, as shown in Table 10. Another choice program mentioned by two of the interviewed teachers and three of the surveyed teachers was Einstein Tutoring that has been implemented at the high school level. In this program students have an option to go to their teachers to get additional help during a certain time period.

Table 9

Teacher Focus Group: Changes to Instructional Programs

N= 8	New High School	Technology	GT	180 Program	Flex Schedule	Tutoring	New Courses	General
Changes last 2 yrs	(5) 63%	(3) 38%	(3) 38%	(5) 63%	(1) 13%	(2) 25%	(3) 38%	(4) 50%

Note: The total n of each of the responses does not equal the number of respondents due to multiple responses.

Table 10

Teacher Survey: Changes To Instructional Programs

N= 37	AP	IB	Magnet	Technology	Fine Arts	Before or After	Flex Schedule	Don't know	Other ^a
Additions last 2 yrs	(11) 30%	(2) 5%	(0) 0%	(17) 46%	(1) 3%	(4) 11%	(6) 16%	(8) 22%	(8) 22%
Additions planned	(5) 14%	(3) 8%	(1) 3%	(9) 24%	(0) 0%	(0) 0%	(1) 3%	(18) 49%	(3) 8%
Deletions last 2 yrs	(0) 0%	(0) 0%	(0) 0%	(1) 3%	(0) 0%	(0) 0%	(0) 0%	(30) 81%	(1) 3%
Deletions planned	(0) 0%	(0) 0%	(0) 0%	(3) 8%	(0) 0%	(0) 0%	(0) 0%	(31) 84%	(0) 0%

^a Other programs: Changes made in last 2 years:
 Additions: 180 Program for 9th graders at-risk (7) 19%
 Einstein tutoring (3) 8%
 Advertising (1) 3%
 Deletions: Concurrent enrollment (1) 3%
 Changes planned for next 2 years:
 GT classes (1) 3%
 Teaming program (1) 3%
 Af-Am studies (1) 3%

Note: The total n of each of the responses does not equal the number of respondents due to multiple responses.

As shown in Tables 11 and 12, when asked why these changes were made, teachers reported that these instructional changes were due to a variety of factors, including decisions made by the principal, recommendations of site-based committees, central office mandates, and/or charter school competition.

Table 11 indicates that the highest percentage (25%) of teachers in the focus group pointed to Site-Based Decision-Making (SBDM) Committees at the campus level as the main

reason for the new high school and the 180 Program. The same percentage (25%) credited the central office for additional Gifted and Talented programs.

While only two of the eight teachers who were interviewed in the focus group attributed specific changes to the existence of charter schools, more of them discussed their impact in general terms, as indicated in Table 10. Discussed in the context of a general attitude, half (4) of the teachers said that charter schools had impacted their schools. One teacher described the existence of charter schools as having “ . . . kind of shaken things up,” or as another teacher stated, “ It raised some flags, and for the longest time, we knew the flags were there, but we didn’t know what to do with them.”

Table 11

Teacher Focus Group: Reasons for Instructional Changes

N = 8	New High School	Technology	GT	180 Program	Flex Schedule	Tutoring	New Courses	General
CHANGE DUE TO								
SBDM	(2) 25%	(1) 13%	(0) 0%	(2) 25%	(0) 0%	(1) 13%	(1) 13%	(0) 0%
Principal	(1) 13%	(0) 0%	(0) 0%	(1) 13%	(0) 0%	(0) 0%	(0) 0%	(0) 0%
Central office	(1) 13%	(1) 13%	(2) 25%	(0) 0%	(0) 0%	(0) 0%	(1) 13%	(0) 0%
Charter schools	(1) 13%	(1) 13%	(0) 0%	(0) 0%	(0) 0%	(0) 0%	(0) 0%	(4) 50%
Parents	(0) 0%	(1) 13%	(0) 0%	(0) 0%	(0) 0%	(0) 0%	(0) 0%	(0) 0%
Other	(0) 0%	(1) 13%	(2) 25%	(0) 0%	(0) 0%	(0) 0%	(2) 25%	(0) 0%

Note: The total n of each of the responses does not equal the number of respondents due to multiple responses.

Table 12 shows that additions were most often made due to SBDM committees, according to 38% of teacher survey respondents, followed by 27% who attributed the changes to central office mandates and 27% who cited principal decisions. Three (8%) of the teacher survey responses attributed recent instructional program additions to charter schools, but none indicated that charter schools were the reason for previous deletions or planned additions and deletions.

Table 12

Teacher Survey: Reasons for Instructional Changes

N = 37	Additions PAST 2 yrs	Deletions PAST 2 yrs	Additions NEXT 2 yrs	Deletions NEXT 2 yrs
CHANGE DUE TO				
SBDM	(14) 38%	(1) 3%	(9) 24%	(2) 5%
Principal	(10) 27%	(0) 0%	(5) 14%	(1) 3%
Central office	(10) 27%	(3) 8%	(7) 19%	(2) 5%
Parents	(2) 5%	(0) 0%	(2) 5%	(0) 0%
Charter schools	(3) 8%	(0) 0%	(0) 0%	(0) 0%
Other a	(7) 19%	(0) 0%	(1) 3%	(0) 0%
a Other reasons for changes:				
Teacher request/choice	(3) 8%	Committee of parents	(1) 3%	
New state curriculum TEKS	(2) 5%	Enough students to make class	(1) 3%	
School Board	(1) 3%	New school: the Academy	(1) 3%	
Departmental	(1) 3%			

Note. The total n of each of the responses does not equal the number of respondents due to multiple responses.

Teachers who were interviewed and those who were surveyed particularly emphasized changes in technology and GT programs, as well as dropout prevention. Teachers who were interviewed in the focus group were more likely than those who were surveyed to consider charter schools as having played a major role in the changed

instructional offerings. One teacher considered the general instructional effects in her comment, “Charter schools offer great competition to public school. Perhaps with charter schools, we will see fewer examples of students viewing the movie Armageddon in Algebra II, etc., etc.”

Parents

Surveyed parents were initially asked if they were aware that parents can choose to send their child at no cost to two public charter schools in the district. Of the 141 parents who returned the survey, 61% were aware. Since the focus of the study was on the perceived impact of charter schools on the school district, the parents who were not aware of any charter schools in Irving were asked to stop and return the survey.

The following two tables show responses of the parents who were aware of charter schools. The question asked first what instructional program changes had taken place in the district during the last two years and, second, reasons for the change. When asked to select all reasons that applied, 52 parents (60%) recognized some type of instructional change had occurred in the last two years (Table 13). The most frequently mentioned additions were technology (21%), Advanced Placement programs (20%), and before or after school programs (16%). Several parents commented in the open-ended questions that GT programs are now more extensive. However, 34 (40%) of the respondents did not know of any additions and 81% had no knowledge of any instructional programs that had ended in the last two years.

Table 13

Parent Survey: Changes To Instructional Programs

n =86 Programs	AP	IB	Magnet	Technology	Fine Arts	Before or After school	Flexible Scheduling	Don't know	Other ^a
ADDED last 2 yrs	(17) 20%	(6) 7%	(3) 4%	(18) 21%	(8) 9%	(14) 16%	(12) 14%	(34) 40%	(5) 6%
ENDED last 2 yrs	(3) 4%	(0) 0%	(0) 0%	(0) 0%	(1) 1%	(0) 0%	(3) 4%	(70) 81%	(0) 0%

Note. The total n of each of the responses does not equal the number of respondents due to multiple responses.

Of the parents indicating that instructional changes have been added in the past two years, the largest percentage of parents did not know the reason for additions (35%) or deletions (63%), but among reasons given, the central office was the most frequently (23%) cited. Only 4% perceived charter schools as the reason for the changes (Table 14). Thus, parent survey results support the hypothesis that the pressure of charter schools has not affected the Irving ISD instructional programs.

Table 14

Parent Survey: Reasons for Instructional Changes

	Principal	Central office	Parents	Charter School	SBDM	Don't know	Other ^a
ADDED Programs n = 52^b	(4) 8%	(12) 23%	(6) 12%	(2) 4%	(8) 15%	(18) 35%	(2) 4%
ENDED Programs n = 16^c	(1) 6%	(2) 13%	(0) 0%	(0) 0%	(3) 19%	(10) 63%	(0) 0%

Note: Percentages do not total 100% due to rounding

^a Other reasons for changes: District decisions, Program continued to expand

^b The n of 52 is the number of parents who previously indicated they knew of instructional programs that were added in the last two years.

^c The n of 16 is the number of parents who previously indicated they knew of instructional programs that had ended in the last two years.

Document Analysis

Examination of the 1999-2000 Irving ISD High School Course Description revealed extensive instructional options currently available to students, including numerous advanced placement and honors courses. Programs are described for specialized studies in Advanced Technology and Engineering; Business; Environmental and Architectural; Legal, Public and Political; Liberal Arts; Math and Science; Medical, Health, and Early Childhood; Travel, Tourism, and Marketing; Visual Arts, Graphic Arts, and Media Production, along with three diploma plans, and four courses offered through concurrent enrollment at an area college. As previously mentioned in this chapter, the new high school academy will have six of these specialization areas.

One of the four priority goals established by the Irving Board of Trustees for 1998-99 was “Develop and implement a plan that will effectively decrease the current dropout trend

and simultaneously increase the percent of attendance.” The new alternative middle school programs, among others, address this priority.

Another board goal is “Achieve District AEIS ‘Exemplary’ distinction by August 2000 with interim objectives to: Achieve a ‘Recognized’ District rating by July 1999.” The primary determinant of this rating is the district/campus performance on TAAS, the statewide assessment instrument. Document analysis of TAAS scores for reading, mathematics, writing, science, and social studies from 1997 through 1999 revealed that the percentages of students passing has increased in all areas. Based on these TAAS scores and additional data from the 1998-99 school year, the district met the board’s interim objective by progressing from Acceptable to Recognized status; that is, rating a three on a scale of four designated categories, with one being the lowest. Out of 1,042 school districts in the state, less than half (48.2%) achieved this level or higher; however, few districts with comparable demographic data achieved this level of distinction (Texas Education Agency, 1999).

Financial Impact: State Funding

H2a. The state funding of the district has not been affected because of students enrolling in charter schools. According to the findings from the study, H2a was accepted. The state funding of the district has not been affected because of students enrolling in charter schools was accepted due to reasons that tend to neutralize effects on the district.

School Officials

First, the state’s charter school funding structure sends per pupil allocations that would have been spent in the home district directly to the charter school instead of taking it from the local district. Districts do not receive state funding nor send tuition for charter school students. Since the allotment is based on the amount that the student would have been entitled to receive as a student in their home district, students from different districts generate

various allocations. That amounts to about \$4500 per student in the case of the Irving school district.

The second reason is that fast-growing districts such as Irving ISD are helped in managing their growth since overcrowded facilities are somewhat relieved, prompting one school official to call the charter schools a “blessing.” The district had almost 500 new students for the 1998-99 school year. The 628 students from Irving ISD attending the two charter schools that year were concentrated in the secondary grade range that is the most crowded in the district and would have doubled the district’s increase overall.

The third reason is that, as a property wealthy district, approximately three-fourths of per pupil district funds come from local district property taxes and only one-fourth from the state. One district financial official explained that when a child leaves to attend a charter school,

That's \$1200 we don't get from the state. That's \$3300 in local taxes we don't have to raise. We really didn't want to do that the other way around because we don't really lose \$3300 when a student goes. Initially we were going to fund it with our local taxes. That would have had a negative impact.

In other words, Irving actually benefits when students whose parents pay taxes in the district leave to attend charter schools since the district neither has to educate their child nor to give up the tax money that they contribute. Equalization features of the state's funding structure mean that the higher the property value per student, the less funding the district receives from the state, and the more that the district is required to raise through local property taxes. Had the district been required to raise the money locally and send it with the student to a charter school, they would have lost the local portion as well as the state portion.

The impact on enrollment of students leaving to attend charter schools is dispersed among campuses in the district, with the exception of one particular middle school campus in

close proximity to one of the charter schools. The principal of that school reported that his school's enrollment declined from approximately 980 to 930 pupils, a decrease he attributed to approximately 50 students leaving to attend the charter school. However, the principal stated that he receives many requests for transfers into the school every year, and that competition among the six middle schools within the district is at least as great as with the charter schools. The principal indicated that although he initially had some discomfort about losing students and families the first year of the charter school's operation, he now saw charter schools as serving a valuable purpose for some students.

Although the district's summer school is not funded by the state, student enrollment was affected in the summer of 1999 when one of the charter schools offered free summer school. The district summer school program is designed to be self-supporting through student tuition, and teachers being hired according to student enrollment. Approximately 300 students attended the charter school summer classes, causing the district's summer school enrollment to decline. School officials stated that the district did not lose money as a result of this decrease; however, the effect was felt primarily by the teachers who did not have the opportunity to earn additional money teaching summer school.

Teachers

During the focus group discussion, teachers were asked about the financial impact of the charter schools in the district. According to one teacher's perception of the impact of the charter schools on student enrollment, "The charter schools in the proximity of my school district were anticipated to be highly competitive before they opened. They had a slight impact on enrollment at first, but now there is no negative effect on our school district." Responses tended to depend on the particular academic departments. For example, one teacher stressed the enhancement of her school's library budget over the last two years. In contrast, another stated that her budget had been cut, extra class periods have been added,

and she teaches more students per class than she did before the appearance of charter schools.

Table 15 shows that under the teacher survey category of financial impact in the district, a large majority (86%) reported an increase in salary, but no change (59%) in extra duty stipends, instructional supplies (57%), or the number of student textbooks (59%). Perceptions regarding the amount of extracurricular activities provided for each student were almost equally divided between the 35% who perceived no change and the 32% who reported an increase. Thirty-five percent said school taxes had increased; however, 38% did not know whether there had been a change.

Table 15

Teacher Survey: Financial Impact

	n=37	Increase 1	No Change 2	Decrease 3	Don't know 4
Total number students you teach		(11) 30%	(15) 41%	(7) 19%	(2) 5%
Number students in each class		(9) 24%	(15) 41%	(9) 24%	(2) 5%
Number class sections you teach		(8) 22%	(24) 65%	(3) 8%	(1) 3%
Amount of your gross salary		(32) 86%	(1) 3%	(0) 0%	(1) 3%
Amount of extra duty stipends		(7) 19%	(22) 59%	(1) 3%	(3) 8%
Money from district for instructional supplies		(6) 16%	(21) 57%	(2) 5%	(5) 14%
Money from district for building improvements		(27) 73%	(3) 8%	(0) 0%	(5) 14%
Number textbooks provided by district per student		(2) 5%	(22) 59%	(0) 0%	(10) 27%
Amount of extracurricular activities provided for each student		(12) 32%	(13) 35%	(1) 3%	(8) 22%
Amount of school taxes		(13) 35%	(6) 16%	(1) 3%	(14) 38%

Note. Not all response categories add up to 100% because some respondents did not answer all questions, and due to rounding of percentages.

Parents

Table 16 indicates parental responses to the two questions they were asked about financial impact in the district of which they would be expected to have some knowledge: extracurricular activities and school taxes. When asked about the amount of extracurricular activities provided by the district, a slightly larger percentage of parents said there had been no change (40%) as compared to 34% of parents who said there had been an increase. Four percent perceived a decrease in extracurricular activities.

The perception of parents related to the amount of school taxes was not clear from the data. While the largest percentage (40%) did not know if there had been a change in the

amount of school taxes, 33% stated there had been an increase. Twenty percent indicated no change, and 5% stated there had been a decrease in the amount of taxes levied by the district.

Table 16

Parent Survey: Financial Impact

n=86	Increase 1	No Change 2	Decrease 3	Don't know 4
Amount of extracurricular activities provided for students	(29) 34%	(34) 40%	(3) 4%	(19) 22%
Amount of school taxes levied by district	(28) 33%	(17) 20%	(4) 5%	(34) 40%

Note. Not all response categories add up to 100% because some respondents chose not to answer all questions, and due to rounding of percentages.

Document Analysis

Documents provided by the district indicated that school district operating expenses have increased steadily since the first year of charter operations in the district from over \$111 million at the end of 1996 to \$140 million estimated for the end of the fiscal year August 31, 1999. The tax rate set for 1999-2000 is \$1.69.4, comprised of \$1.443 for Maintenance and Operations (M&O) plus 22.54 cents for debt service. The M&O for 1999-2000 increased from \$1.42 in 1998-99 to \$1.443, while the debt service decreased from 25.84 cents, totaling an overall decrease from the previous year. However, due to increased property values in the region, the average property owner in the district will likely see an increase in the dollar amount of school taxes owed.

Financial Impact: Capital Improvements

H2b. Long-range plans for capital improvements in the district were not impacted by the existence of charter schools. H2b was accepted since long-range plans for capital improvements in the district were not impacted by the existence of charter schools. The need for such improvements was cited as due primarily to increased enrollment, particularly at the

secondary level. Accommodations for programmatic changes, such as ninth grade wings in the high schools or technology, were another factor.

School Officials

Ideal maximums for school student population have been determined by the school board and the administration as 2100 for high schools, 950 for middle schools, and 850 or less for the elementaries. Two district officials referred to changing growth patterns over the last ten years. These patterns have shifted the overcrowding in the elementary schools in the 1980s to the middle schools in the 1990s, and it is coming to the high schools in the near future.

To meet district goals for maximum school sizes and to accommodate the burgeoning secondary school population, the district has plans to open a \$35 million high school academy in the fall of 2001. A new middle school will open in the same year. New alternative middle schools have been added to the district's physical inventory. Most of the \$170 million bond issue passed in 1997 was for secondary schools, along with about \$47 million allocated for technology for all schools in the district.

Teachers

As indicated in Table 9, teachers who were interviewed mentioned the planned construction of the new high school with a high rate of frequency, but they were not certain as to what programs would be offered or what year it would open. Clearly, as shown in Table 15, most (73%) teachers who were surveyed felt the district had increased the amount of money for building improvements.

Parents

Parents would not ordinarily have knowledge of the district's capital improvement plans, such as new construction, renovations or additions; therefore, they were not asked about the district's long-range capital improvement plans on the parent survey instrument.

Document Analysis

Remodeling took place in the summer of 1999 to provide special 9th grade wings in the high schools. Distance learning centers are being created at each one of the district schools, starting with the high schools, followed by middle and elementary schools, to be completed by the end of 2001. Review of the financial documents indicated four phases of the 1997 bond package projects underway, including three early childhood centers completed in the fall of 1999, technology infrastructure and renovations at various campuses throughout the district over the next three years, and a new middle school and the high school academy scheduled for 2001 completion date.

Financial Impact: Personnel or Class Size

H2c. Class size or personnel have not been affected by changes in enrollment due to students leaving to attend charter schools. H2c was accepted. Tests for H2c were inconclusive due to conflicting evidence obtained from the data; therefore, class size or personnel could not be shown to have been affected due to the charter schools. Teachers reported both an increase and decrease in class sizes and numbers of students, and administrators reported similar conflicting data.

School Officials

In terms of enrollment projections, officials who were interviewed indicated that the first year of charter school operation had the impact of taking out a significant number of students, but since then the district's student population has restabilized. As shown in Figure 2, at no time during the years of charter school operation has the enrollment in the district decreased overall. However, school officials emphasized that adjustments due to the initial loss to the charter schools did not equate to the loss of personnel because only two or three students might have left a particular classroom.

One official described the overall teaching personnel picture as an increase in the number of teachers every year and a decrease in the student to teacher ratio below 16 to 1. Block scheduling at the high schools was one reason given as helping to bring class sizes down. When bigger numbers of students created the need for an additional section, teachers were given an option of teaching an extra class for an extra one-eighth of their salary. According to district officials, as many as seven or eight teachers at a particular high school were employed in this manner.

Teachers

When focus group teachers reported an increase in numbers of students taught, one teacher explained that she and another teacher volunteered to teach seven classes, as opposed to six, and that they are being paid extra for it. This finding confirmed the explanation of the district official discussed in the previous section.

The largest percentage (41%) of teachers who were surveyed perceived no change in the total number of students taught, while one-third (30%) of the teachers indicated an increase, and 19% said the total number had decreased (Table 15). When asked about changes in the number of students in each class, 41% of the teachers said there had been no change in the number of students in each class, and an increase or a decrease was indicated by an equal percentage (24%) of teachers. Sixty-five percent stated there had been no change in the number of class sections taught, while 22% said there had been an increase.

Parents

Parents were not expected to have knowledge of class size or personnel in the district; therefore, parents were not asked questions pertaining to this topic.

Document Analysis

Teacher salaries are very competitive in the district, typically among the top in Dallas County. The Irving School Board has a stated goal to “Develop a comprehensive

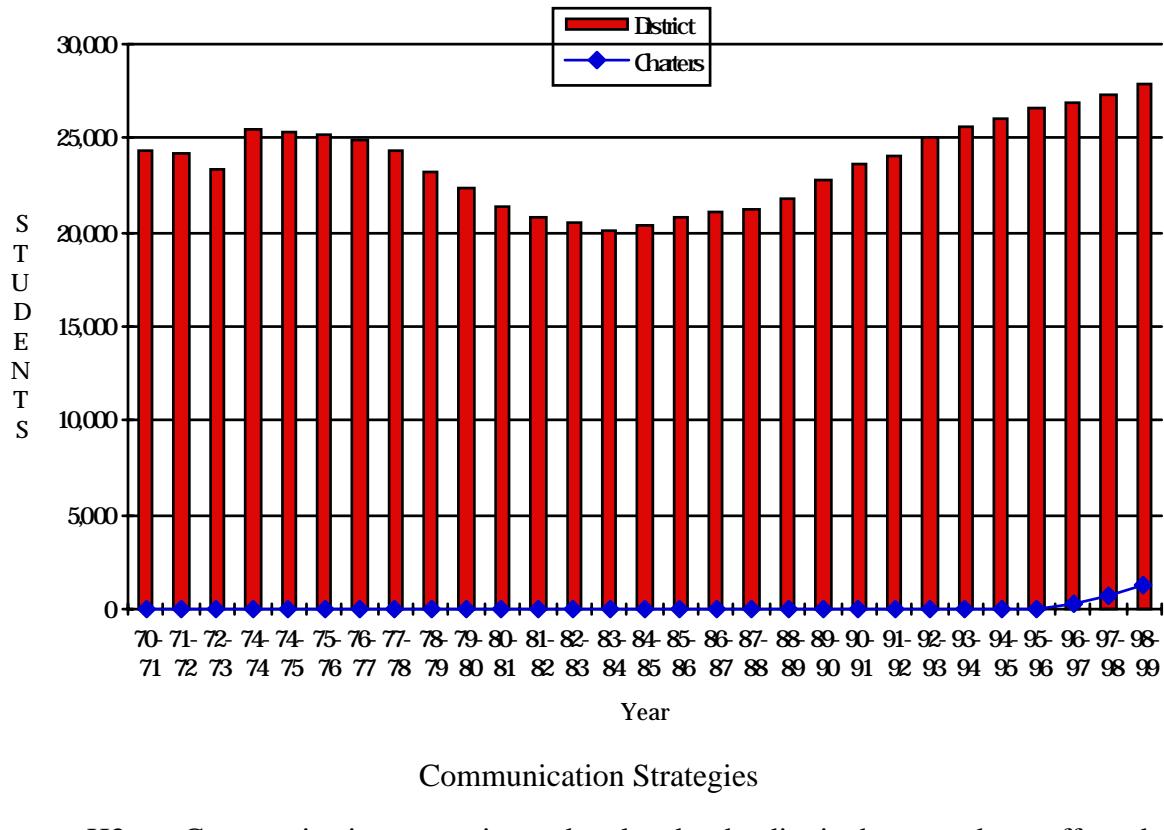
recruitment plan and effective benefits package to recruit and retain highest quality professional applicants for the IISD. The starting salary for 1999-2000 is \$33,000, and all of the employee's health insurance is provided. Other incentives include payment of the last semester of college tuition, books, and fees for bilingual teachers. Approximately 20 teachers who live outside the district took advantage of a new policy last year allowing them to transfer their children to the district for no tuition charge.

Enrollment patterns since 1970 indicated that the district student population grew to 25,442 in 1973, then declined for the next 12 years, when enrollment began grow again in 1985-86. The year 1993-94 saw the district reach over 25,000 first the first time in twenty years. Each year since that time the district has added students to reach its historical peak enrollment of 27,832 in 1998-99, when the study ended. The pattern of continued growth was anticipated for 1999-2000.

Figure 2 shows district growth patterns from school years 1996-97 to 1998-99 compared with the growth of the charter school enrollment. The growth in the district from 26,896 students to 27,832 students coincided with the growth in the charter schools from approximately 289 to 1140 students during the same time period. The district added 936 students, while the charter schools increased 851 students. The first year of charter school operation in the Fall of 1996 saw the district gain 314 students from the previous 1995-96 school year, 440 students between the first and second year of charter school operation, and 496 students between the second and third year. The charter schools increased 355 students from 1996-97 to 1997-98 and 496 students from 1997-98 to 1998-99. The charter school growth figures include all charter school students. Of the students attending the charter schools, slightly over half (55%) were from the Irving School District (Table 4).

Figure 2

School District Enrollment 1970-1999 and Charter School Enrollment 1996-1999



Communication Strategies

H3. Communication strategies undertaken by the district have not been affected because of charter schools. H3 is accepted according to evidence obtained interview and survey instruments and from document analysis. Participants in the study seemed to generally be aware of the existence of charter schools in the community. All school officials who were interviewed were aware of their existence. Almost all (92%) of the surveyed teachers, while slightly less than two-thirds (61%) of the surveyed parents who responded had knowledge of the charter schools in the community.

School Officials

Several of those interviewed expressed a concern that the district should market itself better by getting the word out to the community about the district. Sources for this strategy that were mentioned by respondents included the district's public relations department, active

membership in community and civic organizations, churches, newspapers, cable television, parent advisory and site-based committees, and the decentralization of athletic activities from the central facility back to the home campuses.

According to school board members interviewed, public relations have been “stepped up.” This expression was explained to mean, “the way things are presented, eye-catching colors, and more user-friendly.” An upgraded relocation information packet is provided to local realtors and to the Chamber of Commerce. Board members participate in various community and civic groups.

Very little direct interaction between the district and the charter schools was reported. Although district officials and teachers who were interviewed were aware of the charter schools in general, only a few had visited either of the schools. However, general awareness of the competition was expressed by one elementary principal who said “I tell my teachers every day: remember our parents have a choice.”

Teachers

When asked about communication efforts in the district due to charter schools, comments from one surveyed teacher characterized the district’s reaction as, “Most of the ISD seems to ignore the charter schools.” However, findings from teachers in the focus group interview contradicted this viewpoint when they noted an increase in communication. They told of administrators who held meetings with parents considering sending their children to charter schools, and that as a result, they reevaluated and enhanced their instructional programs. One of the teachers in the focus group described the impact of charter schools as positive because “Whenever your little secure world is shaken a little bit, it makes you look around and say, What am I doing wrong? What do I need to improve on?”

When asked to describe charter schools, respondents were given a choice of four phrases: laboratories for innovative educational practices, schools that serve a particular

population, site-based management, or competitive public schools. Of the teachers who were interviewed in the focus group, only one considered charter schools competitive to public schools. Three teachers who were interviewed agreed that charter schools are schools that serve a particular population. Another commented that they are a home-school alternative, while one teacher called charter schools “an escape from a large population of ethnic varieties.” Of surveyed teachers, 67% selected laboratories for innovative educational practices, followed closely by 65% who described them as a competitive public school.

Parents

Parents seemed to feel that district communication efforts were dependent upon a particular school, principal, teacher, or situation, resulting in uneven levels of satisfaction. Numerous comments about inadequate communication from the district were typified by this parent who said, “Communication with parents of secondary students is inadequate! We want to be involved in our children’s lives!”

Table 17 indicates 47% of responding parents perceived no change in the amount of communication efforts from the district during the last two years, while 28% reported an increase and 7% a decrease. Examples of increases in communication were surveys and letters that were sent home about the new high school.

Table 17

Parent Survey: District Communication

	n=86	Increase 1	No Change 2	Decrease 3	Don't know 4
Amount of communication with parents in the district		(24) 28%	(40) 47%	(6) 7%	(14) 16%

Note. Percentages do not total 100% because respondents did not answer all questions.

In choosing the phrase that describe charter schools from four possible choices, parents ranked them in this order: (1) site-based management, (2) schools that serve a

particular population, (3) laboratories for innovative educational practices, and (4) competitive public schools.

Document Analysis

Examination of documents revealed that the district has undertaken additional public relations efforts, such as improved newsletters, to “tell their story.” One board member described the change in the appearance of the newspaper quarterly insert as “really upscaled in the last couple of years.” This effort was recognized when the publication Inside IISD received the Award of Excellence from the National School Public Relations Association for 1999. The Summer 1999 issue featured stories about the district’s new early childhood centers, TAAS score improvement, National Merit Scholarship winners and other academic achievements, and the 1999-2000 uniform policy guidelines for middle and elementary students. Business partnerships were also highlighted in the issue.

Other communication efforts have resulted in the implementation of an Irving ISD website with extensive information about the district’s programs and services. Input is sought from Irving residents in planning the 1999-2000 budget in an open-ended format requesting suggestions.

Leadership Impact

H4. The perception does not exist that the pool of leaders in the district has diminished as a result of the exit of students and parents to charter schools. H4 was accepted. Findings from the study indicated that the perception existed that the pool of leaders in the district diminished as a result of the exit of top students and their parents to charter schools in the implementation phase, but after the first year, most of those students had returned to the district. The perception was that after the initial year of charter school operation, fewer of this type of student exited the district for that reason.

School Officials

Officials indicated that top academic student leaders and their active parents were among the first who left the district to attend a charter school. One board member said that “Where it hurt us, or did initially hurt us, is we lost some top academic kids and it made it even more of a challenge to excel.” However, officials perceived that many of these students had returned to the district schools for various reasons, extracurricular activities being the reason mentioned most frequently.

When asked if teachers had left the district to teach in a charter schools, examples of a two or three teachers were given, and at least one has returned to teach in the district. One teacher left one of the charter schools in 1998-99 to begin teaching in the district.

Teachers

The perception exists among teachers that top academic students who were leaders left the district to attend charter schools initially, but they seemed to believe these effects on leadership had lessened somewhat, given that some of the students had subsequently returned to district schools. Of teacher survey respondents, as indicated in Table 18, 49% knew of a few students who left to attend charter schools, while 44% didn’t know of any. Over half of teachers surveyed did not know of any students in top academic or leadership positions who left the district to attend charter schools. Focus group teachers supported the survey finding of only a few students leaving, but one teacher who was interviewed explained why this perception existed, “I do have the honor students, and I will say this, it impacted those particular programs. . . It’s not a large number that left, but they were excellent students.”

However, most (60%) of the respondents knew of a few (57%) or many (3%) students who returned from a charter school. Several teachers in the focus group spoke about the reentry difficulties experienced by students returning from charter schools. One stated that, “. . .we kind of lost them” because students didn’t get involved in their home

school at critical stages. A larger majority (78%) also did not perceive that active parents left because their child enrolled at a charter school.

Table 18

Teacher Survey: Leadership

	n=37	Many 1	A Few 2	None 3	Don't know 4
Students left your school to attend charter school		(0) 0%	(18) 49%	(1) 3%	(15) 41%
Top leadership position students left your school to attend charter school		(0) 0%	(4) 11%	(11) 30%	(19) 51%
Top academic students left your school to attend charter school		(0) 0%	(4) 11%	(12) 32%	(18) 49%
Children of highly involved parents left your school to attend charter school		(0) 0%	(9) 24%	(6) 16%	(19) 51%
Child of school board member left your school to attend charter school		(0) 0%	(2) 5%	(8) 22%	(24) 65%
Child of school district administration left you r school to attend charter school		(0) 0%	(3) 8%	(6) 16%	(25) 68%
Child of school district teacher left your school to attend charter school		(0) 0%	(5) 14%	(5) 14%	(24) 65%
Active volunteer parents left your school to attend charter school		(0) 0%	(5) 14%	(7) 19%	(22) 59%
Students returned to your school from charter school		(1) 3%	(21) 57%	(1) 3%	(12) 32%

Note. Not all response categories add up to 100% because some respondents gave multiple answers or chose not to answer the question, and due to rounding of percentages.

Teachers were also polled to see if they would consider teaching in a charter school. A large majority of the teachers (75%) who were surveyed indicated they would not. One commented that she would teach in a charter school, “Only for a pay raise.” Another qualified that while she believed that “most . . . [charter schools] . . . are more harmful than helpful, . . . [she] . . . would be “excited to work within a strong academically focused charter school.”

Parents

Table 19 reflects the responses of the majority (64%) of parents who knew that a few or many students left their child’s school to attend a charter school, while 33% knew of no

students. Most parents did not know of students in top leadership (82%) or academic (68%) positions or active parents (68%) who had left their child's school to attend a charter school. While only 16% stated that students in top leadership positions left, 26% responded that top academic students went to charter schools, reinforcing the perception of one parent who commented, "It appears that they are interested in students with high GPAs [grade point averages]." Some 28% believed that active parents left their child's school. Awareness of a few or many students who returned to their child's school was reported by about half (46%) of the respondents, but more than half (52%) did not know of any.

Table 19

Parent Survey: Leadership

	N = 86	Many 1	A Few 2	None 3	Don't know 4
Students left your child's school to attend charter school		(6) 7%	(49) 57%	(4) 5%	(24) 28%
Top leadership position students left your child's school to attend charter school		(1) 1%	(13) 15%	(28) 33%	(42) 49%
Top academic students left your child's school to attend charter school		(2) 2%	(21) 24%	(21) 24%	(38) 44%
Active volunteer parents left your child's school to attend charter school		(5) 6%	(19) 22%	(17) 20%	(41) 48%
Students returned to your child's school from charter school		(5) 6%	(34) 40%	(9) 11%	(35) 41%

Note. Not all response categories add up to 100% because some respondents gave multiple answers or chose not to answer the question, and due to rounding of percentages.

One parent named a particular teacher who resigned from the district to teach at one of the charter schools. This respondent suggested in an additional comment that not only were there student leaders that left, but "great" teachers who left as well.

Parents were also polled as to whether or not they would consider sending their child to a charter school. Realization that the charter school did not meet their needs was described by parents who remained in or returned to the district. According to some parents, the biggest drawback of the charter schools was the lack of enough options for sports and

fine arts. Less qualified teaching personnel was a factor cited by one eighth grade parent, who suggested that support would be higher for charter schools if they made the teacher standards meet the district standards for personnel. This sentiment was echoed in one parent's comment, "Our district is a great district with many opportunities for the students with many excellent programs and teachers."

However, interest in the charter schools among parents who were surveyed appeared to be strong. As shown in Table 20, half of the respondents said they would consider sending their child to a charter school. One ninth grade parent listed the state accountability system as one reason for this possibility, "I believe that as long as the current system is in place that grades our schools, more and more students will be moving to the charter schools." Other reasons cited by parents included class size, student to teacher ratio, and violence in the public schools and other safety issues. A comment from a sixth grade parent demonstrated the competitive factor related to the size of many public schools, "Charter schools provide a choice and competition for large public schools." A reason cited by parents at every grade level who would not consider sending their child was that they did not have enough information about the charter schools. Many of these parents wanted like more information about educational options for their children, such as one parent who stated, "I think that more information should be sent out about charter schools so parents can know more about charter schools."

Table 20

Parent Survey: Consideration of a Charter School

n = 93		
(46) 49.5%	Would consider sending child to charter school	Reasons Given by Parents
	The charter school	has smaller classes with lower teacher/student ratio is safer has more parents involved is an alternative to large public schools offers summer school at no charge has a central location enhances the academic student in drama or theater has IB program and AP classes
	The district	has crowded conditions has safety issues has violence in public schools has room for improvement
(47) 50.5%	Would NOT consider sending child to charter school	Reasons Given by Parents
	The charter school	has non-degreed/non-certified personnel has students who left district schools but have returned does not have enough athletic opportunities lacks extracurricular activities has drugs, academic and behavior problems has management problems is interested in students with high GPA is hard to get in was closed has already tried been tried has not provided enough information to know

Document Analysis

No documents were obtained that related to top academic students or students who were in leadership positions leaving the district to attend charter schools. Neither were documents available that pertained to active parent volunteers who might have left when one of their children began attending a charter school. Documentation was not available detailing numbers of children of teachers, administrators, or board members from the district leaving to attend charter schools. The district did not provide a record of teachers who left

the district to teach in a charter school, nor of those who returned from teaching in a charter school.

Limitations of the Study

The study was limited to an in-depth examination of the effects of charter schools on one Texas school district. There were no attempts to make comparisons with any other districts, nor any attempt to establish causal relationships.

The possibility of self-selection bias is introduced through the voluntary process by which teachers chose to participate in the structured focus group, as well as those teachers and parents who responded to the survey. Another clear limitation of this study was the extremely low survey response rate that may represent pockets of respondents that are not typical of the teachers or parents in the district. In addition, the response effects bias (Borg and Gall, 1090) that occurs when respondents try to please the interviewer may limit the generalizability of the findings of the study.

Summary

The methodology used in this research was designed to obtain data through both qualitative and quantitative approaches for the research questions. Through interviews, survey, and document analysis techniques, school district responses to charter schools were examined. This strategy resulted in data that address the purpose of the study, thus providing evidence upon which to accept or reject the hypotheses.

The data supported all of the hypotheses of the study. While isolated comments and other anecdotal evidence named charter schools as having been influential in one or more of the areas of instruction, finance, communication, and leadership, the free-market effects of charter school competition was not established as the primary reason for internal organizational changes that had occurred since the charter schools began operations in the district.

CHAPTER FIVE

CONCLUSIONS AND IMPLICATIONS

Introduction

This study examined the extent of internal organizational changes made by a school district resulting from the opening of two charter schools in the district. Documentation of free-market effects on the district due to charter school competition were the focus areas of the research. The goal of the study was to examine the impact of the charter schools on four aspects of the district: instruction, finance, communication, and leadership. The research focused on four questions related to these areas:

1. How have instructional programs in the traditional public school district been affected by competition from charter schools in the district?
2. How have the finances of the traditional public school district been impacted by students leaving the district to attend charter schools in the district?
3. What communication strategies have been undertaken by the district to inform the community about the school district?
4. Does the perception exist that the pool of leaders in the school district has diminished as a result of the exit of students and parents to charter schools?

The Study

The Problem

The purpose of this case study was to investigate whether internal organizational changes have occurred in a school district due to the opening of two open-enrollment charter schools within its boundaries. The dissertation was guided by the four broad research questions related to the effects of charter schools on traditional public school districts.

Hypotheses

The following hypotheses were tested in this study of effects of charter schools on the district.

H1. The instructional programs available in the district have not been affected as a result of the opening of charter schools in the district.

H2a. The state funding of the district has not been affected because of students enrolling in charter schools.

H2b. Long-range plans for capital improvements in the district were not impacted by the existence of charter schools.

H2c. Class size or personnel have not been affected by changes in enrollment due to students leaving to attend charter schools.

H3. Communication strategies undertaken by the district have not been affected because of charter schools.

H4. The perception does not exist that the pool of leaders in the district has diminished as a result of the exit of students and parents to charter schools.

Methodology

The Schools

The Irving Independent School District (Irving ISD or IISD) was selected for the study because it is the only school district in Texas that has two academically competitive charter schools that have been in continuous operation for at least two years at the time of the research. Irving ISD is a growing school district in north central Texas that annually educates approximately 28,000 students. Half of the district's students are considered economically disadvantaged, and 62% are ethnic minorities.

The two charter schools within Irving ISD serve over 1000 regular education students primarily considered non at-risk. Slightly over half of the student population who attended the charter schools in 1998-99 came from the Irving ISD. The larger charter school, which

opened in the fall of 1996 with a technology emphasis, had a student enrollment of approximately 800 students by its third year of operation. The other charter school had about 300 students in the second year of their International Baccalaureate program. Both of the charter schools in the study increased student enrollment during subsequent years of operation, are located in the more affluent northern area of the city of Irving, and require students to wear uniforms.

Inquiry Methods

The methodology used in this research was designed to obtain data through both qualitative and quantitative approaches for the research questions. Through interviews, surveys, and document analysis, school district responses to charter schools were examined. This strategy resulted in data that address the purpose of the study, thus providing evidence upon which to accept or reject the hypotheses.

Limitations

The study was limited to an in-depth examination of the effects of charter schools on one Texas school district. There were no attempts to make comparisons with any other districts, nor any attempt to establish causal relationships.

The possibility of self-selection bias was introduced through the voluntary process by which teachers chose to participate in the structured focus group, as well as those teachers and parents who responded to the survey. Another clear limitation of this study was the extremely low survey response rate that may have resulted in data representing pockets of respondents that are not typical of the teachers or the parents in the district. In addition, the generalizability of the findings of the study may be limited due to the response effects bias that may have occurred when respondents tried to please the interviewer (Borg and Gall, 1989).

The Findings

The data supported all of the hypotheses of the study. Free-market effects of charter school competition were not established as the primary reason for internal organizational changes that had occurred since the charter schools began operations in the district. Worthy of note are isolated comments and other anecdotal evidence that named charter schools as having been influential in one or more of the research areas of instruction, finance, communication, and leadership.

Findings from the study supported H1: The instructional programs available in the district have not been affected as a result of the opening of charter schools in the district. Respondents indicated that the district has made numerous changes in the instructional programs, but according to the evidence, these specific changes do not appear to have been heavily influenced by the implementation of charter schools.

H2a was accepted because the state funding of the district has not been affected because of students enrolling in charter schools. This was due to three primary reasons that tended to neutralize effects on the district: the state open-enrollment charter funding structure, along with increases in district enrollment and district property wealth.

H2b was accepted since long-range plans for capital improvements in the district were not impacted by the existence of charter schools. The need for such improvements was cited as due primarily to increased enrollment, particularly at the secondary level. Accommodations for programmatic changes, such as technology, were another factor.

H2c was accepted: Class size or personnel have not been affected by changes in enrollment due to students leaving to attend charter schools. Tests for H2c were inconclusive due to conflicting evidence obtained from the data. Teachers reported both an increase and decrease in class sizes and numbers of students taught, and administrators reported similar data. Therefore, class size or personnel could not be shown to have been affected due to the charter schools

H3 was accepted according to evidence from the findings that communication strategies undertaken by the district have not been affected because of charter schools. A high level of awareness of the charter schools in the community was expressed by participants in the study, including all school officials, nearly all of the teachers, and almost two-thirds of the parents.

H4 was accepted because the perception does not exist that the pool of leaders in the district has diminished as a result of the exit of students and parents to charter schools. Findings from the study indicated that the perception existed that the pool of leaders in the district diminished as a result of the exit of top students and their parents to charter schools in the implementation phase, but after the first year, most of those students had returned to the district. The perception was that after the initial year of charter school operation, fewer of this type of student were exiting the district for that reason.

Discussion

Could it be said that free-market effects applied in the case of the responses of this traditional school district to charter school competition? Prior to the study, the researcher considered that the district undertook various initiatives in response to the opening of charter schools in the district, but a closer look at what actually happened casts a different light on those assumptions. Rofes (1998) cautioned about the difficulty of linking responses in traditional school districts to the impact of charter schools because “educational change is multi-factorial and emerges out of a rich social, cultural, and political context” (p. 4). Evidence based on the findings from this study suggests that most, if not all, of the recent innovations in the traditional school district would have occurred even without the presence of the charter schools due to the various factors to which Rofes alludes.

Since the first charter school began operating in the traditional school district in 1996, numerous activities have occurred. A new \$35 million high school academy is scheduled to

open in 2001. Instructional initiatives included programs in technology, gifted and talented, bilingual/ESL, early childhood, tutoring, and alternative schools for dropout prevention and recovery. Activities related to financial matters include increased enrollment, along with the budget and teacher salaries, new or renovated buildings, and lower pupil to teacher ratios. Both the quality and the quantity of communication initiatives have been increased in the district's attempt to inform the community about the district schools. Leadership voids seemed to have been filled as former charter school students either returned to their assigned schools, or other students came forward to fill the vacancies.

Intuitively, the researcher sensed during the interviews that certain changes in the district had been made due to the existence of the charter schools since school officials in general were reluctant to admit that the existence of charter schools were the reason for actions taken by the district. Upon further probing, different respondents explained numerous possibilities why changes had taken place, including school board actions, leadership by the central administration, teacher excellence, student motivation, and community support. Teachers who were interviewed and survey respondents confirmed most of the perceptions held by district officials. They described numerous instructional changes, but generally did not see these changes as being the result of charter schools in the district.

However, the impact of the charter schools appeared to be a positive overall influence on the district climate. Rather than being threatened by the presence of the charter schools, reflective practices within the district seemed to lead to improved outcomes, as typified by this teacher's perception,

. . . it's made public schools--it's made this school, it's made our district say,

'How can we improve this district? What can we do? What do we need to do?'

And I think then immediately that had a chain reaction. We all got busy thinking

and doing and looking at our own home territory, and it's changed things for the better.

The financial effects of the charter schools have also been positive for this particular district, especially since the charter schools have actually helped to relieve overcrowded classrooms in the growing district. The state charter school funding structure works to the advantage of wealthier districts and to the disadvantage of poorer districts. A district official explained the effect of this policy, "If we were a school district that was property poor, and we got most of our funds from the state, it would probably have a greater impact on that school district than it would on ours because if I'm getting . . . 75% of our funds from the state and now we're losing students, we're losing some dollars."

The reason cited most often by the teachers as influencing decisions in the traditional school district was the site-based decision making committee. A charter school is viewed by some as the ultimate in site-based decision making; a district that meaningfully utilizes this level of school governance is actually practicing one of the principles of the school choice movement: those closest to the results of the decision are involved in making it. Apparently, this is the case in many of the schools in this district.

As to a competitive environment created by the presence of charter schools, schools in the district operate in a highly competitive environment among the campuses, within the region, and as part of the highly visible state accountability system; therefore, the existence of the charter schools did not appear to necessarily require higher degrees of competitive responses than were already occurring in the district. In the scope of this study, district actions that would have occurred even without the presence of the charter schools cannot be determined definitively.

However, interest in the districts' charter schools among parents appears to be strong. A comment from a parent echoed this belief, "Charter schools provide a choice and

competition for large public schools.” The fact that half of the responding parents would consider sending their child to a charter school should serve as an important signal to the district to pay attention to client needs. If they falter in responding to the wishes of their clientele or to educating them to what they are doing, in the future the district may suffer some loss due to the charter schools. On the other hand, parents may rethink their consideration of charter schools if district personnel listen carefully to the concerns of parents and are more responsive.

In conclusion, the district responded in a manner consistent with the market competition theory. Based on this economic model, a district is not likely to respond if they do not perceive any adverse effects as a result of the existence of charter schools. Such was the evidence found in this study: perceptions did not exist that the charter schools had a substantial effect on the district’s operations.

Given the findings of this study, it may be naive to assume that the introduction of charter schools will have significant competitive influence on a traditional school district. Most participants from the school district in this study did not consider the district to be in competition with the charter schools in the district. Such a perception is likely to be the case until three conditions occur: the number of charter schools increases, a higher percentage of students from the district attend charter schools, and there is a financial loss. Therefore, one must not reject the notion of the application of market competition to public schools based on failure of the district to respond, but instead on whether or not the district perceives that such competition exists.

Recommendations for Further Research

Charter schools are a relatively recent phenomenon, and perhaps more time is needed to fully determine how districts will respond to them. The whole arena of school choice has a long list of future research possibilities. But, in particular, given the scant empirical

research, more studies should be undertaken to determine the potential effects of the educational marketplace on existing schools.

Not only is more research needed, but in light of the fact that there were low response rates to the parent survey, different research methodologies could be employed. Although an approach that is considerably more expensive, telephone surveys might provide additional data. Multiple focus groups with parents could also be utilized in order to obtain data that would be more revealing. Further, more tangible evidence related to the impact of charter school competition might be found by tracing the historical evolution of changes in the district to the original source of the idea. Changes also could be examined in their historical context through an analysis of archived documents, such as newspaper articles, to determine if the idea for the change might have coincided with specific media information about the charter schools.

This research can serve as a benchmark for a future longitudinal study that examines the effects of charter schools over a longer period time in the district where the study took place. Perhaps a particular length of time of charter school existence might be linked to how the district will respond to charter school competition. The district has a long history of educational innovations; therefore, a comparison could also be made to see how the rate of new program implementation has changed in the three years before and after the charter schools began operating in the district.

Research needs to be conducted in other school districts with charter schools to examine the competitive effects. This study should be replicated in another locale with more charter schools or where a larger percentage of district students attend charter schools. Research should be undertaken to determine marketplace effects in districts where there is a loss of funding in the traditional school district. Comparative studies need to be made between districts with charter schools and those without to see if the rate of innovation is

different in the districts affected by charters, or if the kinds of innovations are different.

Future studies might look at the effects on smaller districts versus larger districts, rural versus urban or suburban, and local campus versus open-enrollment charters.

Effects of charter schools on student achievement are particularly important. Studies need to be done that examine the impact of charter schools on student achievement in the traditional school district, as well as the overall school learning climate. Charter schools may have an impact on teachers in the traditional district in terms of job satisfaction and heightened entrepreneurship. Studies are needed to determine how classroom teachers are affected by marketplace competition in their district.

Clearly, charter schools and school choice are envisioned as having the capacity to disrupt the status quo in educational bureaucracy. School administrators and school boards may be affected by charter schools in terms of management and governance responses in school administration. Studies in this area would contribute to the body of knowledge about policy development and implementation as a response to competition.

Summary and Conclusions

This study answered important questions about the market effects of charter schools in one traditional public school district. In this case, factors other than the impact of the charter schools appeared to account more for initiatives that have taken place in the district during the last two to three years. These include district leadership, community input, and a highly visible state-level accountability system. While the charter schools provided additional choices for certain individual students, the district itself seemed to be focused toward improving educational options for all of its students.

One of the more significant findings of the study suggested that perception of charter schools as market competition may increase as parental awareness increases. Only 61% of the parents knew about the existence of the charter schools in their district, but of those

parents who were aware of the charter schools, half of them would consider sending their child to a charter school. When the implications of this data are considered, clearly, the traditional school district must be proactive in undertaking initiatives that are viewed by the parents as responsive to the needs of their children.

As the drama of school choice continues to unfold, educators and policymakers will have significant opportunities to make decisions about charter schools and school choice that will affect educational outcomes for all students. Based on observations from this study, the following general recommendations are offered with the hope that the outcome will be improved educational opportunities for all students.

1. Knowledge about School Choice: The trend toward school choice, especially charter schools, is a phenomenon that will be present in many communities, and school officials and educators in traditional school districts should become knowledgeable about this movement.

2. Positive Cooperation: School officials in the traditional school district may wish to consider the possibilities of positive cooperation with charter schools as an opportunity to improve educational offerings in the community.

3. Laws and Regulations: As policymakers create and modify laws and regulations concerning school choice, they should carefully examine the extent to which the legislation will generate appropriate competition that will improve all schools.

Appendix A
Overview
of Texas Charter School Options

OVERVIEW OF TEXAS CHARTER SCHOOL OPTIONS

Type	Home-Rule District Charter TEC §§12.001-12.030	Campus Charter TEC §§ 12.051-12.064	Open-Enrollment Charter TEC §§ 12.101-12.118
Features	Allows existing districts to re-constitute themselves as locally controlled systems free from most state requirements including curriculum, employment, and student discipline.	Allows a campus or campus program to operate free of most state and district requirements including district instructional and academic provisions.	New school districts that attract students from within or across existing district lines. Funding follows student. May not charge tuition and must provide normal transportation. Operate free of most state requirements except state-required curriculum. May locate in commercial or public facility as either new start-up school or conversion of existing school.
Charter Components	<ul style="list-style-type: none"> •Educational program •Charter continuation dependent on student performance and district accountability •Charter probation/revocation •Governance •Health and safety measures •Budgeting process •Auditing and PEIMS participation 	<p>Same as home-rule except:</p> <ul style="list-style-type: none"> •Must specify no admission discrimination •Budgeting process not included 	<p>Same as home-rule except:</p> <ul style="list-style-type: none"> •Charter duration •Level of acceptable student performance •No discrimination in admissions including student achievement and athletic ability •Grade levels •Educator qualifications •Faculty descriptions •Geographic area served •Enrollment criteria
Laws that Apply	<ul style="list-style-type: none"> •Federal law •Court orders related to special and bilingual education •Teacher Retirement System •Criminal offense provisions •Limitations on liability •PEIMS •Educator certification and associational rights •Criminal history records •Student admission and attendance •Student transfers •22:1 ratio for low-performing campus •High school graduation requirements •Special and bilingual education •Prekindergarten •Transportation safety •School finance •Extracurricular activities •Health and safety •Public School Accountability •Equalized wealth •Bond or tax rate limit •Purchasing requirements 	<ul style="list-style-type: none"> •Federal law •Teacher Retirement Systems •Criminal offense provisions •Limitations on liability •PEIMS •Criminal history records •High school graduation requirements •Special and bilingual education •Prekindergarten •Extracurricular activities •Health and safety •Public School Accountability •Priority in student admissions for geography and residency. Secondary considerations include age, grade level, academic credentials as related to program 	<p>Same as campus charter</p> <p>Required to file bylaws and detailed information about officers and governing body members. Subject to federal disability law as in a traditional public school. May issue bonds for educational facilities. (1997)</p>
Approval Process	<ul style="list-style-type: none"> •District appoints charter commission if 5% of voters or 2/3 of school board requests •Secretary of State review •Texas Education Commissioner review •Majority vote in election with at least 25% voter participation 	<ul style="list-style-type: none"> •Petition by majority of parents and teachers •School board approval 	<ul style="list-style-type: none"> •State Board of Education develops approval criteria and procedure. Criteria must include: <ol style="list-style-type: none"> 1. Student performance 2. Innovative programs 3. Impact on existing districts

Unique Features	<ul style="list-style-type: none"> •Voter participation requirement may be major barrier to charter adoption 	<ul style="list-style-type: none"> •Principal approval not required •School board may not arbitrarily deny approval •Charter is contract between school board president and charter CEO •School board retains legal responsibility •Governing body subject to Open Meetings/Open Records laws •School Board must have a campus charter approval policy (1997) 	<ul style="list-style-type: none"> •May be operated by universities, non-profit organization, or a local government entity •State Board selects impartial organization to evaluate •Charter is contract between State Board of Education chair and school CEO •Governing body subject to Open Meetings/Open Records laws •Number allowed: 1995: 20 + 1997: 100 + unlimited at risk
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Note. From “Senate Bill 1 Governance Changes: Flattening the Pyramid, Charter Schools, and Empowering Parents,” by F. R. Kemerer (1995, October). Adapted with permission of author.

Appendix B
Interview Protocol
for School District Officials

1999 INTERVIEW PROTOCOL with SCHOOL DISTRICT OFFICIALS
Central Office Administrators, Campus Administrators, School Board Members, Teachers

This research is part of a University of North Texas dissertation study of effects of charter schools on school districts.

Effects of Charter Schools in Your School District

ALL ANSWERS WILL REMAIN CONFIDENTIAL.

1.
 - a. Please identify instructional changes
 - (1) any instructional programs added during the last 2 school years.
 - (2) any instructional programs deleted during the last 2 school years.
 - (3) any instructional programs planning to add or delete in the next 2 years.
For example:

Advanced Placement classes	Before or after-school programs
International Baccalaureate program	Flexible scheduling
Magnet program	Fine Arts programs
Instructional technology	Others _____
 - b. Why do you think these programs have been added or deleted?

Principal decision	Central Office Mandate
Parental demand	Charter School Competition
Site-based decision-making committee	Other reasons _____
2. Effects on the finances of the district
 - a. Estimate the number of students who left your district to attend a charter school during each of the last two years.
 - b. What kinds of changes related to school funding or financial impact have occurred because of the charter schools during the last two years?
For example:

Total number of students taught by teachers?
Number of class sections for each teacher?
Amount of personnel gross salary or supplemental pay?
Money for textbooks or instructional supplies or building improvements?
Extracurricular activities provided for students?
School taxes levied by the district?
3. What has been the impact of charter schools on parental involvement and student school leadership?
For example:
 - a. Can you think of student leaders who left the district to attend a charter school?
 - b. Can you think of parents who were highly involved in the school district who have chosen to enroll their child in a charter school?
4. What types of communication efforts have been made the district within the last two years or are planned for the next two years?
5. Which of these terms do you think best describes charter schools?

Laboratories for innovative educational practices	True site-based management
Schools that serve a particular population	Competitive public schools
Other terms _____	

Appendix C
Survey
of School District Teachers

ID _____

**Effects of The Charter School(s) in Your School District
1999 SURVEY OF SCHOOL DISTRICT TEACHERS**

Your participation is needed to reflect the viewpoints of public school teachers in this study. Please complete the questionnaire and mail it to me in the enclosed stamped envelope by **FRI., JUNE 25**. This questionnaire is part of a University of North Texas dissertation study of the effects of charter schools on public school districts. Participation in this survey is voluntary and anonymous. All data will be reported in the aggregate. Questionnaires are numbered for tracking purposes only. **All answers will be CONFIDENTIAL.** If you have any questions, or if you prefer to answer by phone or email, please contact me at home: Diane Patrick (817) 461-2501 or email dianep@flash.net Use back of page to answer questions if needed.

INSTRUCTIONAL PROGRAMS IN THE DISTRICT

1. What **ADDITIONS** have been made to your school's instructional programs during the **LAST 2 YEARS** ?

(Check all that apply.)

- | | | | | | | | | | | |
|---|--|---|-------------------------------------|---|---|--|---|--|---|---|
| <input type="checkbox"/> Advanced Placement classes | <input type="checkbox"/> International Baccalaureate program | <input type="checkbox"/> Magnet program | <input type="checkbox"/> Technology | <input type="checkbox"/> Fine Arts programs | <input type="checkbox"/> Site-based decision-making committee | <input type="checkbox"/> Principal decision | <input type="checkbox"/> Central office mandate | <input type="checkbox"/> Parental demand | <input type="checkbox"/> Charter school competition | <input type="checkbox"/> Before or after- |
| <input type="checkbox"/> Flexible scheduling | | | | | | <input type="checkbox"/> Other reasons (Please specify.) | | | | |
| Don't know of any | | | | | | | | | | |
| <input type="checkbox"/> Other (Please specify.) | | | | | | | | | | |

These instructional changes were due to

(Check all that apply.)

2. What **DELETIONS** have been made to your school's instructional programs during the **LAST 2 YEARS** ?

(Check all that apply.)

- | | | | | | | | | | | |
|---|--|---|-------------------------------------|---|---|--|---|--|---|---|
| <input type="checkbox"/> Advanced Placement classes | <input type="checkbox"/> International Baccalaureate program | <input type="checkbox"/> Magnet program | <input type="checkbox"/> Technology | <input type="checkbox"/> Fine Arts programs | <input type="checkbox"/> Site-based decision-making committee | <input type="checkbox"/> Principal decision | <input type="checkbox"/> Central office mandate | <input type="checkbox"/> Parental demand | <input type="checkbox"/> Charter school competition | <input type="checkbox"/> Before or after- |
| <input type="checkbox"/> Flexible scheduling | | | | | | <input type="checkbox"/> Other reasons (Please specify.) | | | | |
| Don't know of any | | | | | | | | | | |
| <input type="checkbox"/> Other (Please specify.) | | | | | | | | | | |

These instructional changes were due to

(Check all that apply.)

3. What **ADDITIONS** are planned for **NEXT YEAR** to your school's instructional programs?

(Check all that apply.)

- | | | | | | | | | | | |
|---|--|---|-------------------------------------|---|---|--|---|--|---|---|
| <input type="checkbox"/> Advanced Placement classes | <input type="checkbox"/> International Baccalaureate program | <input type="checkbox"/> Magnet program | <input type="checkbox"/> Technology | <input type="checkbox"/> Fine Arts programs | <input type="checkbox"/> Site-based decision-making committee | <input type="checkbox"/> Principal decision | <input type="checkbox"/> Central office mandate | <input type="checkbox"/> Parental demand | <input type="checkbox"/> Charter school competition | <input type="checkbox"/> Before or after- |
| <input type="checkbox"/> Flexible scheduling | | | | | | <input type="checkbox"/> Other reasons (Please specify.) | | | | |
| Don't know of any | | | | | | | | | | |
| <input type="checkbox"/> Other (Please specify.) | | | | | | | | | | |

These instructional changes were due to

(Check all that apply.)

4. What **DELETIONS** are planned for **NEXT YEAR** to your school's instructional programs?

(Check all that apply.)

- | | | | | | | | | | | |
|---|--|---|-------------------------------------|---|---|--|---|--|---|---|
| <input type="checkbox"/> Advanced Placement classes | <input type="checkbox"/> International Baccalaureate program | <input type="checkbox"/> Magnet program | <input type="checkbox"/> Technology | <input type="checkbox"/> Fine Arts programs | <input type="checkbox"/> Site-based decision-making committee | <input type="checkbox"/> Principal decision | <input type="checkbox"/> Central office mandate | <input type="checkbox"/> Parental demand | <input type="checkbox"/> Charter school competition | <input type="checkbox"/> Before or after- |
| <input type="checkbox"/> Flexible scheduling | | | | | | <input type="checkbox"/> Other reasons (Please specify.) | | | | |
| Don't know of any | | | | | | | | | | |
| <input type="checkbox"/> Other (Please specify.) | | | | | | | | | | |

These instructional changes were due to

(Check all that apply.)

Survey continued on p. 2

FINANCIAL IMPACT IN THE DISTRICT

5. During the **last two school years**, what kind of changes have occurred in the following areas?
(Please answer each question with a circle around the number in the appropriate column.)

	Increase	No Change	Decrease	Don't Know	
Total number of students that you teach?	1	2	3	4	
Number of students in your separate classes?	1	2	3	4	
Number of class sections that you teach?	1	2	3	4	
Amount of your gross salary?	1	2	3	4	
Amount of your extra stipends for supplemental duties?	1	2	3	4	
Money provided by district for instructional supplies?	1	2	3	4	
Money provided by district for building improvements?	1	2	3	4	
Number of textbooks provided by district per student?	1	2	3	4	
Amount of extracurricular activities provided for students?	1	2	3	4	
Amount of school taxes levied by the district?	1	2	3	4	

LEADERSHIP IN THE DISTRICT

6. Please read the statements and CIRCLE THE NUMBER in the appropriate column.	Many	A Few	None	Don't Know
Students from your school left to attend a charter school.	1	2	3	4
Students returned to your school from a charter school.	1	2	3	4
Students in top leadership positions left your school to attend a charter school.	1	2	3	4
Students with top academic standing left your school to attend a charter school.	1	2	3	4
Children of highly involved parent(s) left your school to attend a charter school.	1	2	3	4
The child of a school board member, current or past, left your school to attend a charter school.	1	2	3	4
The child of school district administrator left your school to attend a charter school.	1	2	3	4
The child of school district teacher has left your school to attend a charter school.	1	2	3	4
Parents who are active in volunteer school efforts have left your school because their child is enrolled in a charter school	1	2	3	4

7. How would you describe the charter school(s) in your district? NUMBER phrases below in order from 1-5.
(**1** is **highest** phrase that **BEST** describes charter schools, and **5** is **lowest** phrase that **LEAST** describes them.)

- Laboratories for innovative educational practices
- Schools that serve a particular population (e.g., At-risk or International Baccalaureate)
- Site-based management
- Competitive public school

Other (please specify) _____

Survey continued on p. 3

TEACHER DEMOGRAPHICS

8. Total public school teaching (Please check one)

Years of experience
 1-5 years
 6-10 years
 11-15 years
 16-20 years
 21 + years

9. Grade level currently teaching (Please check one)

PreKindergarten-Kindergarten
 1-2
 3-5
 6-8
 9-12

10. Highest educational level attained (Please check one) 11. Ethnicity (Please check one)

high school diploma
 associate degree
 bachelor's degree
 master's degree
 doctoral degree

African-American
 Anglo
 Asian-American
 Hispanic
 Native American
 Other

12. Age (Please check one)

Less than 25
 25-30
 31-40
 41-50
 51-60
 More than 60

13. Gender (Please check one)

Female
 Male

14. Residence (Please check one.)

Within the school district where I teach
 Outside the school district where I teach

15. If you have school-age children, where do they attend school?

(Check all that apply. If you have no school age children, please skip to the next question)

public school in this district
 public school in another district
 public charter school
 private school

16. Would you consider teaching in a charter school? _____ no _____ yes

17. Are there any other comments you would care to make about the impact of charter schools on your school or district?

End of Survey.

**Thank you for taking your time to complete this questionnaire!
Please return in the enclosed stamped envelope to:**

Diane Patrick
4000 Shady Valley Court
Arlington, TX 76013
(817) 461-2501
email dianep@flash.net

Appendix D
Survey
of District Parents

Please return this survey when completed.

ID _____

1999 SURVEY OF SCHOOL DISTRICT PARENTS

Please complete this questionnaire and mail it back to me in the enclosed stamped envelope by Friday, JULY 30. Your participation in this study is needed to reflect the opinions of parents in the district. This questionnaire is part of a University of North Texas study of the effects of charter schools on public school districts. Participation in this survey is voluntary and anonymous. All data will be reported as a total of all the participants. Questionnaires are numbered for tracking purposes only. **ALL ANSWERS WILL BE CONFIDENTIAL.**

If you have any questions, or if you prefer to answer by phone or email, please contact me at home: Diane Patrick at (817) 461-2501 or email dianep@flash.net

1. Are you aware that parents can **choose** to send their child or children **at no cost** to two public charter schools in Irving? **(Please check ONE.)**

_____ YES, I am aware of the charter schools in Irving.
If YES, please continue to question 2.

_____ NO, I am NOT aware of any charter schools in Irving.
If NO, please STOP and return the survey.

INSTRUCTIONAL PROGRAMS IN THE DISTRICT

2. What **NEW programs** have been **ADDED** to your child's school during the **LAST 2 YEARS**?
(Check ALL that apply.)

- | | |
|---|--|
| _____ Advanced Placement classes | These changes were due to |
| _____ International Baccalaureate program | _____ Principal decision |
| _____ Magnet program | _____ Central office mandate |
| _____ Technology | _____ Parental demand |
| _____ Fine Arts programs | _____ Charter school competition |
| _____ Before or after-school programs | _____ Site-based decision-making committee |
| _____ Flexible scheduling | _____ Don't know |
| _____ Don't know of any | _____ Other reasons (Please specify.) |
| _____ Other (Please specify.) | |

3. What programs have been **ENDED** at your child's school during the **LAST 2 YEARS**?
(Check ALL that apply.)

- | | |
|---|--|
| _____ Advanced Placement classes | These changes were due to |
| _____ International Baccalaureate program | _____ Principal decision |
| _____ Magnet program | _____ Central office mandate |
| _____ Technology | _____ Parental demand |
| _____ Fine Arts programs | _____ Charter school competition |
| _____ Before or after-school programs | _____ Site-based decision-making committee |
| _____ Flexible scheduling | _____ Don't know |
| _____ Don't know of any | _____ Other reasons (Please specify.) |
| _____ Other (Please specify.) | |

FINANCIAL IMPACT IN THE DISTRICT

4. During the **last two school years**, what kind of changes have occurred in the following areas?
(CIRCLE the NUMBER in the appropriate column.)

	Increase	No Change	Decrease	Don't Know	Amount of
extracurricular activities provided for students?	1	2	3	4	
Amount of school taxes levied by the district?	1	2	3	4	

Amount of communication with parents in the district? 1 2 3 4
 (Please give some examples.)

Please continue survey on next page.

LEADERSHIP IN THE DISTRICT

	Many	A Few	None	Don't Know
STUDENTS from your child's school LEFT to attend a charter school	1	2	3	4
STUDENTS RETURNED to your child's school from a charter school.	1	2	3	4
STUDENTS in top LEADERSHIP positions LEFT your child's school to attend a charter school.	1	2	3	4
STUDENTS with top ACADEMIC standing LEFT your child's school to attend a charter school.	1	2	3	4
PARENTS who are active school VOLUNTEERS LEFT your child's school because their child is enrolled in a charter school	1	2	3	4

6. If you know, how would you describe the charter school(s) in your district?

NUMBER the phrases below in order from 1-5.

(1 is the highest, the phrase that **BEST** describes the charter school(s), and 5 is the lowest, or the phrase that **LEAST** describes them.)

- Laboratories for innovative educational practices
- Schools that serve a particular population (e.g., At-risk or International Baccalaureate)
- Site-based management
- Competitive public school
- Other (please specify) _____

7. Are there any other comments you would care to make about the impact of charter schools on your school or district?

PARENT/FAMILY DEMOGRAPHICS

1. Number of children in the family

(Please check ONE.)

- 1 child
- 2 children
- 3 children
- 4 children
- 5 + children

2. What grade level of school will your child/children be attending NEXT school year?

(Please check ALL that apply.)

- preschool
- elementary
- middle school
- high school
- college or university
- will not be enrolled in school

3. Where will your school-age children attend school NEXT year?

(Please check ALL that apply.)

- public school in this district
- public school in another district
- public charter school
- private school

4. Would you consider sending your child to a charter school?

(Please check ONE.)

- no
- yes

End of Survey.

Thank you for taking your time to complete this questionnaire!

Please return in the enclosed stamped envelope to: Diane Patrick

(817) 461-2501
email dianepp@flash.net

4000 Shady Valley Court
Arlington, TX 76013

Appendix E
Informed Consent Form
For All Participants

The Response of Traditional Public Schools to Charter Schools

The purpose of this study is to obtain opinions from teachers, administrators, and parents from the Irving Independent School District about the potential impact of public school charters on school districts. Participants will be asked to respond to a written questionnaire or interview questions that will be given orally and tape recorded. The length of subject participation time will be approximately 30 minutes.

Responses will be anonymous because they will be coded with numbers and no names will be used. The confidentiality of participants is assured with the guarantee that the choice to participate or not participate in answering the questions will not be identified with you personally. The data collection in this research will be analyzed in the form of a doctoral dissertation and a copy will be given to professors Dr. Frank Kemerer, Dr. Carrie Ausbrooks, and Dr. Charldean Newell at the University of North Texas. The findings from the research will be submitted for presentation at a conference and for publication to a professional journal.

If you have any further questions or problems connected with participation in this project, please contact the project investigator Diane Patrick at (817)461-2501 (home), (817) 272-3575 (work), or home email dianep@flash.net.

INFORMED CONSENT

I have been informed that any information obtained in this study will be recorded with a code number that will allow the researcher to determine my identity. At the conclusion of the study the key that relates my name with my assigned code number will be destroyed. Under this condition, I agree that any information obtained from this research may be used in any way thought best for publication or education.

I understand that there is no personal risk or discomfort directly involved with this research and that I am free to withdraw my consent and discontinue participation in this study at any time.

I, _____, agree to
(print name)
participate in a study about the potential impact of public school charters on school districts.

(Date)

(Signature of Study Participant)

(Date)

(Signature of Investigator)

This project has been reviewed and approved by the University of North Texas Committee for the Protection of Human Subjects (phone 940-565-3940).

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