

Fees in Public Schools

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## ABSTRACT

This study investigated fees in public schools in seven school districts of British Columbia. A conceptual framework was formulated from issues in the literature on privatization, principles of taxation, school fee law and practices, and the public/private sectors of education. The framework was then applied to study the occurrence of school fees in public education and their effects on students.

Purposive sampling techniques were employed to select districts, schools, and personnel for the study. Selection criteria included size, wealth, location and ethnic composition of districts and schools. Semi-structured interviews were conducted with a total of fifty-four professionals including school district officials, school administrators and teachers. The data were analyzed using qualitative techniques.

Explanations for current fee practices included: 1) financial and budgetary limitations; 2) the philosophy of users' pay; and 3) an educational policy on voluntary educational pursuits. Fees as a source of revenue to maintain, improve and introduce educational services occurred in four categories: curricular, extracurricular, incidental, and supplementary and special.

Administrators at the district and school levels emphasized that fee waivers, bursaries and reimbursements could be applied where necessary. However, costs could not always be absorbed by the school and, needy students were not always easily identified. Schools varied in the degree to which they experienced fee administration difficulties. Most principals indicated that the elimination of all school fees would result in curtailment or discontinuation of certain activities and items. Educators agreed that psychological and social effects from charging fees were also important concerns.

Main conclusions are: 1) the benefit principle and ability-to-pay principle are both used to justify school fees; 2) school policies and laws define the application of fees according to required and non-required curricula, thus fees are encountered chiefly for course electives and voluntary activities; 3) by charging fees, schools are able to provide resources necessary for student programs and activities; 4) fees can negatively impact on student participation and psychology. Two policy directions are suggested based on the principles of benefit and ability-to-pay: the maintenance of current levels of fees and the augmentation of fee in public schools.

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## Chapter 1

### INTRODUCTION

Public education is intended and often assumed to be free but historically students in Western countries have been charged for some educational services. These direct charges to public school students or their parents are, by definition, problematic because Western governments have moved increasingly after World War I to provide public education financed by tax dollars. In British Columbia, the Putman Weir Report of 1925 recommended the abolition of fees with their removal occurring shortly thereafter. School fees have not been present in the public elementary schools of British Columbia for about 125 years. Furthermore, in North America, during the post 1960's period one of the central goals of public education became equality of educational opportunity. Therefore, it seems somewhat contradictory for public schools to be imposing charges on students from households of different income levels while at the same time claiming to aim for reduction of social inequalities. While disagreements over private contributions have consistently accompanied school charges (Johnson, 1964, 1968; C.E. Phillips, 1957), the debate is likely to intensify in the future as governments face economic recession and taxpayer resistance to higher levels of public spending (Guthrie, 1977; Katz, 1979). Schools in Britain (Haviland, 1988), the United States (Catterall and Brizendine, 1985; Hamm and Crosser, 1991), and Canada (Fowler, 1989) are facing increasing difficulty to provide a broad range of educational services free of charge. The issue is therefore an important concern in developing school finance and educational policy.

## Research Problem

The issue of student fees in public education has been of long standing interest in a segment of the education literature. It must be noted, however, that one weakness of the available literature in this area is the lack of Canadian studies and the reliance on the United States context.

Most studies have provided little insight into the questions of why and how fees are levied in public schools. Typically, the financial studies on fees have tended to give an account of the activities and items for which fees are charged and the amounts that are charged to students (Jacobson, 1944; Gould, 1948; Dolan, 1951; Schultz, 1952; Punke, 1954; Ezell and Coleman, 1954; Haskell, 1952; and Evans and Wagner 1971). Studies on legal aspects of fees have focused on what a State's Constitution stipulates regarding fees and court rulings on relevant cases. However, according to Buser, Long and Tweedy (1975) school districts face squeezed budgets as taxpayers and legislators demand new services and greater economy forcing school districts to seek additional avenues of revenue. Legislatures and schools are apparently making increasing use of a source that receives little publicity and has no organized opposition. It should be noted that fees can be a substitute for fund raising, and vice versa, within most schools. Money raised through school organized fund raising ventures is often used to offset direct costs to students.

With respect to the effects of school fees, they are said to violate the ideal of free public education (Hamm and Crosser, 1991). Imposition of additional school fees potentially diminishes equal access to education, students' self worth, and equity among taxpayers (p. 31). Early studies on student costs in public secondary schools established a relationship between poverty and dropout rates among students, with fees being found to be one of the related factors

(Nania, 1959; Hand, 1949). One result of fees can be an appreciable expense to even middle income families sending children to public schools (Buser, Long, and Tweedy, 1975). Other potential effects are: relief of the burden on taxpayers; ability of schools to purchase and uniformly provide items; ability of schools to offer specialized activities to those who are interested; development of parental sense of responsibility; hardship, especially on poorer families; administrative and clerical problems for teachers, sponsors, and school secretaries; and reduction of student participation. The reviewed studies have provided little understanding of plausible rationales for student fees. The processes of fee collection and application have also remained largely undiscussed in the education finance literature. A set of theoretical concepts is required to explain why, how and with what effects school authorities implement fees.

### Public Policy Considerations

From the standpoint of public policy, several fee-related topics require close examination. Arguments from the literature on education (Hamm and Crosser, 1991), school law (Kendall, 1984), and public and school finance (Musgrave, Musgrave & Bird, 1987; Guthrie, Garms & Pierce, 1988) are briefly outlined in this section to illuminate the different and often competing perspectives that are brought to bear on these subjects. Then public policy trends in privatization provide a social and political backdrop against which school fee policies may be interpreted.

The practice of charging student fees for basic academic textbooks and materials in fifteen school systems in the United States, has important implications for equity because many of the same states tend to spend less money on their students than the national average (Hamm

and Crosser (1991). Because education money comes from a mix of local taxes on property, income and sales school finance has been able to move closer to a delicate balance between educational opportunity for students and equity for taxpayers (Hamm and Crosser, 1991). The researchers maintain that student user fees are a regressive form of taxation as they are not determined by the family's ability-to-pay, its overall economic situation, or the number of family members in school and paying fees. As a result, the assessment of any school fees raises questions as to whether all students have equal access to public education.

Counter arguments to those of Hamm and Crosser are provided by perspectives from the public finance and education finance literature. The contrasting principle to ability-to-pay is the benefit principle of taxation which is also equitable. In establishing tax criteria, the most obvious criterion is that persons should pay in proportion to benefits received, or in proportion to their contribution to the cost of whatever is supported by the tax (Guthrie et al., 1988, p. 98). The ability-to-pay principle fails adequately to estimate individual preferences for various levels of publicly supplied goods and services (Musgrave et al., 1987; Guthrie et al., 1988).

Objections to a liberal application of student user fees have been stated on educational, political, and psychological grounds (Kendall, 1984). First, such charges are believed to compromise the educational goal of total human development as they deny some students the benefits of full exposure to the academic variety, social skills, and activities contemplated in achieving this goal. Second, it is proposed that while in most schools a basic academic education remains free, students who choose to pursue less traditional course work may receive their "free" education at substantial expense particularly in vocational-technical or fine arts courses (pp. 118-119). In fact, fees may well exacerbate the type of inequalities described by Kozol (1991). While vouchers can be said to be the central pillar of the choice agenda as depicted in Chubb and Moe (1990), thus far fees have not been so characterized. But there is

the potential for fees to increase freedom of choice. In the re-invented model of public education of Osborne and Gaebler (1993) there is a place for tuition and other school fees according to the wishes of parents and communities, and the dictates of entrepreneurial government. Third, it is argued that when school systems diminish the availability of educational quality and breadth by imposing fee charges, these systems impede the efficacy of the socialization process (Kendall 1984, pp. 120-21).

Some educational practitioners and researchers oppose the argument that student fees act as barriers to human development and effective political socialization. Practitioner accounts suggest that education programs are made more attractive for those students with special interests or needs who are willing and able to pay for program enrichment. Baker (1980), found that adult students who contributed to the costs of continuing education demonstrated higher attendance rates and motivation levels.

The final objection to fees by Kendall (1984) is related to the potential injury that inability to afford student fees poses to students' psychological health. She asserts that statutory fee waiver provisions in cases of individual economic hardship only partially mitigate the legal and ideological objections to school fees. In contrast, it is a commonly held social value that positive psychological benefits are cultivated when students pay for programs, materials and activities. Also, school climate, size, and the privacy and discretion surrounding fee waiver practices seem to influence student behavior.

It is possible that school fees might undermine the vision of the common school and thus the attempt by public education to instill a sense of national community in a similar way in which private schools are thought to work against social cohesion. However, ethnic and religious minorities in Canada and beyond have sought increasingly in the last two and a half decades to establish local control of education as a way of ensuring relevance, diversity and good

quality. In the absence of adequate school budgets, fees within public schools might support these needs.

Educational policy occurs within the context of social, political and economic structures. The topic of school fees and related educational problems such as equity may be explained within the context of "privatization trends". In the next section, privatization policies raise questions related to the role of government in a democracy, equality of opportunity, efficient allocation of goods and services, and political action by citizens.

### Privatization Trends

Policy initiatives affecting financing and production of social services have been explained by a pattern of events labelled "privatization". In a definition of privatization, Ascher (1987) notes that it has global features.

The word "privatization" itself is an umbrella term that has come to describe a multitude of government initiatives designed to increase the role of the private sector. In its most literal sense, as it is used by the Thatcher Government, it refers to the transfer of state ownership in nationalized industries to the private sector. The objective of such exercises is to introduce greater competition into these industries thereby improving efficiency and reducing the cost to the public (p. 4).

Privatization initiatives have been classified differently by different agencies and writers. Both the narrow definition of the British government and the broad definition of Pirie (1988) are regarded as inappropriate by Ascher (1987). Heald and Morris (Ascher, 1987) are credited with advancing a more sophisticated approach. They split privatization into four classes:

1. The first is equivalent to denationalization. It means in effect the sale of nationalized industries to the private sector and the gradual withdrawal from comprehensive public provision in areas like education, health and social services.
2. A second form involves the substitution of customer fees for tax finance, an example of this is in the recent increases in the charges for NHS services.
3. Liberalization constitutes a third form of privatization and refers to the abolition or relaxation of the monopoly powers of nationalized industries, as witnessed in the case of British Telecom and the Telecommunications industry.
4. The fourth and final form of privatization is the contracting out of public services to the private sector. Under contracting out arrangements, public authorities continue to bear direct responsibility both for the provision arrangements and for the quality of service provided although the work is actually carried out by employees of private firms (pp. 6-7).

Other approaches have sought to develop theories of privatization. A general theory of privatization incorporates three perspectives: privatization as radical and conservative economics (Starr, 1989), privatization as community empowerment (Berger and Neuhaus 1977), and privatization as politics (Starr, 1989; Brodtkin and Young, 1989).

The radical economic approach of privatization comprises two strands of thought. The first viewpoint holds that competition is the best way to foster efficiency in the provision of any service or good. The discipline of the market is the only suitable criterion against which to test efficient allocation of scarce resources (Pirie, 1988; Friedman, 1962). The second strand of the radical approach is the public choice school. This perspective, called the economics of politics, applies the economic framework to politics and bureaucratic behavior and concludes that whereas it produces benign effects in the market place, it produces pathologies in the political arena and government bureaucracies (Starr, 1989; Seldon, 1986). The only reasonable solution is a pragmatic rather than an idealistic one: to return decisions and property to the private sphere.

Privatization as conservative economics is a combination of theories about allocating mechanisms that have already failed to allocate resources efficiently (Starr, 1989). First, there is the theory of market failure which justifies government finance and supply or government regulation and control. However, there is increasing evidence that the state may not be any

more efficient than the market in its allocating function. Bureaucratic wastage, inefficiency, limited budgets and so forth reinforce this view (Pirie, 1988; Brodtkin and Young, 1989; Friedman and Friedman, 1981). The third sector, voluntary or non-profit-making organizations, has been considered as possibly being the proper location for financing and/or supplying social services. But many community charitable organizations tend to be organized along ethnic or religious lines. Also, in some cases providers attempt to enhance their positions and rewards at the expense of similar community agencies and their own constituents. Moreover, a distinction has to be made between the ability to evaluate different types of services. As a certain level of professional care is required, agencies such as nursing homes become increasingly organized for-profit. Starr (1989) suggests that the contemporary climate favors more dependence on market arrangements than in a decade or so ago. But as Harrison and Stanbury (1990) argue, savings through privatizations have to be measured against government's regulatory role in establishing and maintaining high standards in areas such as health and the environment.

Privatization as community empowerment is well articulated in the literature by Berger and Neuhaus (1977). Unlike the economic perspectives, it is concerned not so much with the efficiency criterion, but rather with the development of people-sized, community organizations that can mediate between, on the one hand, huge cold government bureaucracies and, on the other, mega-organizations of the market-place. The central principle valued in this theory is that of human agency.

Finally, privatization as politics is perhaps the most important of the three theories. Brodtkin and Young (1989) contend that for many economists efficiency is probably not the overriding concern of privatization. They concur that crucial to government policy regarding social services in the welfare state are the questions of what are the ends of privatization, what claims

are given priority by power elites, and what issues are placed on the public agenda. A key notion in discussion of privatization is the competition between opposing forces and interests (Walker, 1987; Esping-Anderson, 1989). A contrasting viewpoint is offered by Osborne and Gaebler (1993). Privatizing initiatives are interpreted as processes government may use to transform inefficient and ineffective government.

Some of the general privatization processes are thought to be more applicable to education than others (Whitty, 1984). In industrialized countries with extensive welfare sectors, privatizing trends in education are presented as part of a wider attempt to reduce public expenditure and promote the operation of private enterprises in a free market. The features of the more general movement manifest themselves in education in three ways: the privatization of the public sector, direct subsidies to the private sector, and indirect encouragement of the private sector. For the purposes of this study, the first strategy is the important one and needs some elaboration.

Privatization of the public sector, according to Whitty, comprises a number of threads. In some cases, parts of public services are actually transferred to the private sector while they continue to be paid for from public funds. A second strand of privatization of the public sector is the introduction of charges to clients. Sometimes this is reasoned to be for peripheral services, such as extra music tuition. Nevertheless, Whitty suggests that it sets more general precedents and may effectively remove the services from the reach of low income families. The third strand is the attempt to make the public sector operate more like the private sector by competing for clients in the open market. The more important and broader purpose of privatization is that of giving private individuals control over their own lives (Whitty 1984, pp. 52-53).

The second strand of privatization according to Whitty, i.e., the introduction of charges or fees to clients, connects directly with the problem under investigation in this dissertation. However, in this study privatization will mean the movement of goods and services from public to private provision. Thus, a distinction is maintained between fees and privatization as defined. An explanation of what school fees in public education mean will consider what happens to equity, choice and the quality of educational services within the context of educational policy.

### School Fees Legislation and Interpretation

The legal framework for school fees, its ministerial interpretation, and the existing school fee practices in British Columbia may be used to illustrate a local educational problem with universal dimensions. School authorities in British Columbia began in the late 1980's to formulate coherent policies to govern such charges (Fowler, 1989). In British Columbia, confusion arose about the interpretation and application of Section 100 of the School Act (1989). See the relevant section in Appendix A. Concern with the need to ensure free public education and equality of educational opportunity echoes throughout the Sullivan Report (British Columbia Royal Commission on Education, 1988). The current School Act of British Columbia (1989) was a product of that government commissioned report on the state of education in the province. Section 100 of the Act stipulates that every school age person resident and enrolled in a public school in a district is entitled to the following free of charge:

- 1) instruction in an educational program sufficient to meet the general requirements for graduation set out in the orders of the minister, and

2) educational resource materials necessary to participate in the educational program.

Apart from these requirements, school boards may charge fees for goods and services provided by the board. If they do so, they must publish a schedule of fees and deposits. Contradictory interpretations have arisen particularly with respect to "free," "necessary," and "educational program." Each interpretation has different implications for educational policy and school budgets (Lupini, 1989; Grieve, 1989; Brummet, 1989).

A ministerial memorandum to school districts in British Columbia sought to clarify charges by school boards which extend beyond the technical terms of Section 100, into the "grey area" of "basic expendable supplies" (Brummet, 1989). Under section 100 (3) of the Act, the Minister of Education can make orders to limit boards' powers to charge for goods and services supplied, if it is perceived that school boards are abusing their powers. One legal opinion commissioned by the British Columbia School Trustees Association suggests that "it is an opportune time to review the fees charged and consider not only whether they are permitted under section 100 but also whether they are necessary and appropriate in all cases and whether they fall disproportionately on students in nonacademic programs" (British Columbia School Trustees Association, 1989). To date, the legal implications of section 100 (1)(2) of the School Act have not been tested in court (Nicholls, 1990).

### Definitions

"Fees", "user fees", "user charges" and "beneficiary charges" are terms that are often used synonymously in the public finance literature (Mushkin, 1972; Van House, 1983; Musgrave

et al., 1984, 1987). More generally, a fee is "a payment asked by professional people or public servants for their services: a doctor's fee; school fees"; and "a charge made for a privilege: an entrance fee" (Collins English Dictionary, 1979). "User charge" is a relatively new term commonly introduced into industrialized societies since the post World War II era. Ever since 1970, it has appeared in public finance literature. Mushkin and Bird (1972) state that the terms under consideration are all examples of public pricing. Mushkin and Bird (1972) identified several general categories under which a wide variety of fees, licenses, and charges are applied in urban areas. They include: policing, transportation, health and hospitals, education, recreation, commodity sales, sanitation, sewerage, other public utility operations, housing, neighborhood and commercial development, licenses and fees.

While there may not always be a clear distinction made between "fee", "user fee", and "beneficiary charge", the user fee concept always suggests the notion of a government as supplier of a good or service which may or may not be publicly subsidized (Rosen, 1985). According to Mushkin and Bird (1972), "public pricing" is used to identify a method of payment for public services. The real confusion occurs between user fee and benefit tax, the latter term being reminiscent of beneficiary charge (Milliman, 1972). There is, however, a clear distinction between taxes and public prices:

Public prices may be differentiated from tax increases in several ways. First, payment of the user charge is optional and not compulsory, as a tax payment is. Those individuals who decide to pay for the service will simultaneously garner a new benefit with their new burden. Also, a fee, when it falls on a relatively small portion of consumer-voters, regardless of their place of residence, may generate a smaller and less effective amount of community opposition than the burden of tax increases that must be shouldered by all (Mushkin and Bird, 1972, 445).

A practical definition of user fee is provided by Van House (1983).

A fee for service, also called a user, use, or beneficiary charge, is distinguished from other government revenues because a voluntary exchange takes place. The individual chooses to purchase a good or service from the public sector. Taxes in contrast are involuntary, and the payment of the tax is frequently divorced from consumption of the service it supports.... Some common beneficiary charges include bus fares, bridge tolls, and charges for park and museum admissions, hospital treatment, parking, and public utilities (1983, 103).

According to Musgrave et al. (1987), examples of specific benefit taxes are found in given situations.

Whereas the general benefit tax is of interest mainly as a theoretical concept, practical applications of benefit taxation may be found in specific instances where particular services are provided on a benefit basis. This may be the case where direct financing is made via fees, user charges or tolls. Or certain taxes may be applied indirectly in lieu of charges, as is done in the taxation of gasoline and other automotive products for purposes of highway finance (p. 23).

In such cases, benefit taxes are synonymous with user fees. Unlike, Mushkin and Bird (1972), both the Musgrave et al. and Van House's definitions of specific types of benefit taxes and fees do not refer to political opposition. However, one feature of a user fee is that it is optional unlike other kinds of taxes which are compulsory. Direct benefits accrue to the users when purchasing a good or service; this is not always the case with taxes.

Some observations about user fees may be summarized at this stage. Implicit in the term is the government as supplier. Efficient and equitable application of user fees occur when the benefits are internalized (as opposed to externalized) by the buyer. There is a growing tendency for a considerable range of public services to be treated in this fashion. Reasons for supporting user fees are to ease the pressure from government finances by raising revenues, to efficiently determine the level of supply needed, and to make consumers aware of the costs of providing services. Benefit taxation may be applied only when it is feasible to exclude those not paying for the services from the consumption benefits.

Several different words or terms have been used to mean fees in public education. Researchers have referred to these expenses in the following ways: "additional fees", (Vetere, 1986); "school fees" (Kirkman, 1982); "expenditures, costs, and fees" (Bulthaus, 1983); "participation fees" (Stabler, 1982); "fees and incidental costs" (Foutch, 1975; Wyatt, 1970); "academic service charges" (Cameron, 1969); "hidden student costs" (Nelson, 1962; Waters, 1969); school expenditures of pupils" (Whaley, 1953); and "pupil participation costs" (Walker, 1953). An examination of these terms suggests that the words "student" or "school" preceding "fee" simply focuses attention on either the agent responsible for imposing the fee or the agent responsible for paying it. Many of the above terms refer to specific categories of school or student fees, e.g., additional, academic, incidental, hidden and participation fees and are therefore too narrowly construed for the purposes of this study. They represent specific instances of the generic term school fee. Three types of school fees will be defined in Chapter 2.

The more general "school fee" is defined by Kirkman (1982) as "(A) charge for particular school supplies or activities, including charges in the form of required purchases, rentals, and deposits" (p. 6). Similarly, "pupil participation costs" refer to:

[T]he expenditures which high schools impose upon or expect their pupils to make, including the sums of money that pupils who attend secondary public schools in Arkansas are required or expected to expend for (1) materials used in the classroom; (2) dues and fees or assessments; (3) attendance at school sponsored functions; and (4) various general expenses directly related to being a member of the secondary school (Waters 1969, p. 7).

A definition of "school expenditures" used by Whaley (1953) comes close to the general meaning of fees proposed in this dissertation.

School expenditures is used in this study to mean whatever costs are created for the pupil by the school either in the classroom or through extracurricular activities

with the exception of food, ordinary clothing, transportation and shelter. These expenditures are over and above the regular tuition charges of the school which are normally paid through tax-supported money" (p. 20).

A succinct and useful definition of schools fees is that by Kendall (1984). She employed it "to refer to the wide range of miscellaneous charges imposed by schools to defray costs for particular classes, extracurricular activities, special equipment, books and supplies" (p. 100). Ordinarily, fees for tuition in public education are not charged. In this context, educational resource materials and educational supplies cover a wide range of items.

Researchers in this area of school finance have used school or student fee to refer to both specific or general types of charges students incur in schools. Definitions of school expenditures and pupil participation costs closely follow the global meaning of school fees by including both curricular and extracurricular costs. School fees have excluded costs for food, ordinary clothing, shelter and transportation. As well, it has excluded tuition (fees) which is money paid to an educational institution for instruction, not including materials, books or laboratory fees. Participation fees, close to the term participation costs, have been applied narrowly to mean charges for extracurricular activities.

The term school fees will apply in this study and will be used interchangeably with "student fees", "student costs" and "charges." In this study, school fees are any of the numerous charges students pay for educational programs, items and participation in school sponsored activities and events. An "educational program" is defined in the School Act of British Columbia as:

"an organized set of learning activities that, in the opinion of (a) the board, in the case of learning activities provided by the board, (b) the minister, in the case of learning activities in a Provincial school, or (c) the parent, in the case of learning activities provided to a child registered under section 13, is designed to enable learners to develop their individual potential and to acquire the knowledge, skills and attitudes needed to contribute to a healthy society and a prosperous and sustainable economy" (School Act, Part 1).

The School Act definition of educational program will apply in this study.

### Significance of the Study

There is a lack of literature and research on the processes and application of school fees. Furthermore, there is speculation but little factual knowledge about the consequences for equal access to educational programs when a user pay system is applied. As Kendall (1984) suggests, there are political, administrative and economic issues interlinked in this subject:

The school fee problem is complicated and difficult to resolve. Public school fee issues involve sensitive matters of fiscal, administrative and social policy. The choices are seldom clear cut. Strong plausible and practical arguments support both sides of an issue plagued by conflicting and often highly emotional interests. Under current economic conditions, schools may be unable to provide a broad range of educational services free of charge (p. 133).

Debates about financing and administering education are informed by theoretical discussions from public finance. Public support for education is based on economic theories of public, private and mixed goods. Among economists and education finance scholars, education is regarded as a mixed good (Musgrave et al., 1987; Rosen, 1985; Bezeau, 1989; and Moffatt and Brown, 1973). It is a service from which public as well as private benefits are derived. Two disparate views exist on the financial support and provision of education. Traditionally, one stream of thought in the public finance literature suggests that while education is a service which could be provided by means of a pricing system, it delivers sufficient social benefits to justify its major financial support and provision by the government (Brown, 1981; Musgrave et al., 1987). The second stream of thought regards the restoration of free market competition and consumer choice to education (via educational vouchers, for example) to be critically important while still providing public financial support (Friedman, 1981; Wiseman, 1959). The second theoretical approach separates the functions of finance and supply.

However, given that elementary and secondary levels of schooling continue to be largely financed and supplied by governments in the developed world, questions related to tax equity and efficiency continue to be posed (Musgrave et al., 1987). A great deal of disagreement exists on how to interpret fairness and equity. Interpretations of these concepts involve principles of taxation: the benefit principle and the ability-to-pay principle. But fundamental questions arise about how ability-to-pay should be measured, how the tax burden should be distributed among people with unequal ability-to-pay and what measures of administrative and economic efficiency should apply in relation to equity criteria. Guthrie and associates (1988) propose that competition often arises among the values of equity, efficiency and freedom.

In this study, public school fees are conceptualized as a form of "benefit taxation" and thus as an application of a market mechanism to a mixed good. This conceptualization is consistent with theory and practice in the field of public finance and education finance. The study makes a contribution to the theory of public finance and in particular to equity and efficiency theories of school finance. A conceptual model shaped by principles of taxation and empirical findings on legal and financial aspects of fees in education is designed to throw light on the research questions.

Fees in public education may be directly linked to current public policy initiatives and debates about privatization. Many views conflict on the philosophy and processes behind the privatizing of public services in Britain (Ascher, 1987; Curwen, 1987; Privatisation, 1985), Canada (Hardin, 1989; MacAvoy et al., 1989; Kierans, 1984; Hunter, 1987; and Walker, 1987), and the United States (Kammerman and Khan, 1989). A user fee in education has some implications for the application of the same principle in other public services (Fox and Riew, 1984).

## Purpose of the Study

The purpose of this study is to investigate why, how and with what consequences educational authorities implement fees in public schools. This study attempts to identify the relevant factors that determine such school policy and practices at the grade 11 and 12 levels, and to explore what effects these factors produce on the quality of education and the goal of equal educational opportunity for selected students. Two research questions are addressed: why do fees exist in public schools and how does the application of fees in schools affect the provision of educational services?

## Overview of the Dissertation

Chapter 1 provided the background to this study, an introduction to the research problem, the significance and the purpose. Literature relevant to the principles of taxation, school fees and the public/private dimensions of education is reviewed in Chapter 2 and the conceptual framework used to address the research questions is developed. Chapter 3 is concerned with the research design. It describes the research context, data collection procedures, interview schedules, and details of the samples and methods of data analysis. Chapter 4 shows the results of the interviews conducted at the district and school levels. Chapter 5 uses interview data to provide an indepth thematic description of how school personnel talked about school fees. In Chapter 6 findings are summarized, conclusions are derived, and some implications for further research and educational policy are outlined.

## Chapter 2

### REVIEW OF LITERATURE AND CONCEPTUAL FRAMEWORK

The global policy concerns discussed in Chapter 1 serve to illustrate that educational finance decisions are not made in isolation. They are shaped by social equity and educational goals within a given socioeconomic and political milieu. The focus of the literature review in this chapter moves from some of the broad political and economic dimensions of education, private/public education divisions, and ethnicity to a more technical taxation framework. The following section states briefly the reasons for government involvement in education, outlines some criticisms of this role, and then discusses how a totally privatized system of education would operate. It contextualizes the problem of fees in public schools.

#### Political and Economic Dimensions of Education

One reason advanced for government provision of education is the paternalistic principle (Peston, 1984). Compulsory education is based on the paradox that one would choose to be educated if only one were educated. Since education is not compulsory beyond the age of sixteen in most jurisdictions there is a prima facie argument that it should be financed primarily by tuition fees. However, as noted before, secondary schools in Canada have been free of tuition charges for about seventy years. As well, substantial social benefits result from schooling between the age of sixteen and high school graduation. State subsidy has been at least as connected with a paternalistic view of the problem as it has been based on externalities. Market imperfections constitute another major reason for public education. Perfect market conditions

would mean availability of loans for students to purchase their education and the supply of education to meet demands as well as employment for graduating students. However, since market conditions are never perfect, and because of the special nature of education, financing through private markets are not regarded as desirable (Bezeau, 1989). But while paternalism, externalities, and market imperfections rationalize government finance of education, they do not, in economic terms, justify government supply of education (Dennison, 1984; Coons and Sugarman, 1978; Friedman, 1962). In fact, public administration of education is argued to be a government monopoly with self-destructing tendencies (West, 1982).

A purely privatized education system would mean private ownership, finance, and control (Peston, 1984). These may refer to all levels of schooling and to some or all types of schooling and examining bodies. Within ownership, it would be relevant to distinguish between profit-making and non-profit-making bodies. On finance, a relevant distinction may be made between pure private finance and various modified forms. Purely private control would still mean that the schools are subject to the laws of the society. In such a situation, Peston observed that it would be hard to make a case for compulsory education. The nature and extent of what would be provided would be determined by market forces (1984, p. 53). Questions about the effectiveness of such a system and evaluation criteria are not settled simply by economic cost-benefit analyses, but by consideration of the purposes of education. Analysts face the danger of focusing on only what is measurable or observable (Peston, 1984, p. 156). The problematic nature of measuring educational outcomes are well documented (Blaug, 1968, 1984; Kerishaw, 1965).

Voucher financing for schools is a form of privatized education. One type would mean giving parents a government issued voucher for either full or partial payments at public or private schools. The voucher mechanism would establish a free market for education in which

schools would succeed or fail according to their popularity with consumers. Too little is known about market provision of education to predict the precise effects of enhanced choice backed by purchasing power (Peston, 1984). A major finding from a limited voucher experiment conducted in Alum Rock, California in the early 1970's was that parents gave the nearness of a school to the home as their most important reason for selecting a school. A study of controlled choice in Massachusetts public schools suggests that parents will generally choose a school near home but they will prefer a distant school thought to be better (Glenn, 1991) The public financing of private schools in Canada is proposed as being similar to voucher financing (Bezeau, 1989). One major drawback of the market forces approach to education is that education does not easily meet the optimal conditions for a voucher system. They include: well-informed customers, frequent inexpensive purchases, some excess supply, goods of which the quality can be easily observed, and rapid certain feedback on the correctness of purchases (Bezeau, 1989). Thus, as Peston (1984) asserts, to argue that competition will necessarily improve education as it has improved other commodities is simply dogma.

Government provision of education has been justified by arguments related to externalities, paternalism, and market imperfections. Criticisms have been levelled against public supply of education because of perceived bureaucratic inefficiencies and monopolistic tendencies. Yet a purely privatized system would still require government regulation of educational processes and outcomes. One form of a partially privatized system is that of voucher financing. But education does not easily meet the optimal conditions for a voucher system. Thus, it is more difficult to obtain market efficiency in this arena than with other commodities.

There is a gap in this discussion about the role of school fees and the various justifications for government financed and supplied education. Voucher financed education

systems are not the same as user fees in education. In the first case, government still finances the system but in the second case individual students and their parents bear the burden. Concerns with balancing equity, efficiency and choice are likely to be addressed by school representatives. Results may indicate that attempts are made to equally balance students' needs and demands with the benefits derived and their ability to afford certain activities and programs. School authorities' concerns for efficiency may be related more to administrative matters than to market or broader socioeconomic aspects.

The next section explores the private and public spheres of education. It has been argued that privatization policies are aimed at changing the traditional boundaries between public and private sectors and the mix of the welfare state (Brodkin and Young, 1989; Starr, 1989; Walker, 1987). Education is perceived as one of the social services for which governments are attempting to reduce their control and responsibility (Fisher, 1982, 1989).

### Public and Private Dimensions in Education

Within western industrialized countries, private schools are perceived as problematic for policy makers who operate largely within contexts of publicly financed and administered education. There are many arguments for and against private education (Cibulka, 1989). Supporters of public education have pointed to policy initiatives they believe demonstrate increased state support for private sector education over the public sector. The initiatives include: 1) the Education Reform Act and the assisted places scheme in Britain; 2) the Independent School Support Act (1977) in British Columbia; the Sullivan commission on education in British Columbia (1988); the commission on private schools in Ontario (1985); and

proposals in the American Congress during the Reagan era for the introduction of tuition tax credits for private school education. Predictions were made that private sector education could make significant gains at the expense of public education by undermining a publicly held consensus about the value of public education (Walford, 1990; Chitty, 1989). This could lead to a re-structuring of the private/public dimensions of education (Fisher, 1988, p. 35; Bergen, 1986).

Virtually every country in the world has some private schools. Among developed nations, private education enrollment is as low as one per cent of the school age population in Sweden at the primary level, and as high as 72% in the Netherlands, at the secondary level. In the USA, 18% of students attend private primary schools and 10% attend private secondary schools. In Canada, the overall figure for private schools is five percent of the total school age population (Bergen, 1989; James, 1988).

Perhaps the most frequent argument in support of the existence of private schools is the claimed right of parents to exercise choice in something as important as educating their children (Bergen, 1982). Article 26(3) of the Universal Declaration of Human Rights, which was proclaimed by the General Assembly of the United Nations and signed by Canada, is frequently quoted in support of this argument (Bezeau 1989, p. 190). In a brief prepared by the Federation of Independent Schools Associations for submission to the Royal Commission on Education in British Columbia, the government was urged to "honour the rightful role of parents in the education of their children" (1988, p. 8).

The pluralism or "non-discrimination" argument is closely related to that of choice. It is argued that the educational system ought to reflect the variety and diversity of the society it serves and that alternative forms of schooling should therefore be provided on a non-discrimination basis (Federation of Independent School Associations, 1988; Magsino, 1986).

It has particular relevance to Canada with respect to religion but is also related to various forms of nonreligious education. In Alberta, Saskatchewan, Ontario, Quebec, and Newfoundland, Catholic denominational schools are an integral alternative in provincial school systems, and are on an equal basis with public schools for local and provincial financial support (Bergen 1989, p. 14). Other religious denominations have argued for similar treatment but the Shapiro Report (1985) stated that while no legal basis existed for that argument a moral basis may apply.

Supporters of public education rebut the arguments of the parental choice and social pluralism by arguing for a public system that promotes social cohesion. Often private schools are perceived to be elitist. Facilitating parental choices for education based on religion, language, ethnicity and class can lead to fragmentation of education and ultimately of a society (Fisher, 1988).

When parents send their children to private schools, they are usually expected to pay tuition while continuing to pay taxes to support public schools. This has given rise to the argument of double taxation of parents who have their children attend private schools (Muller, 1987). Furthermore, it is argued that when parents use private schools they ease the burden on the public system. This situation is perceived as an unjust and inequitable approach to education (Federation of Independent School Associations, 1988, p. 8). The Shapiro Report (1985) rejected the double taxation argument. In that report it was argued that parents may exercise their choice to opt for private education and that tuition payments were not taxes.

In response to the issue of double taxation, an argument centering on equality of opportunity is made by advocates of the public system. It is widely believed that private schools help to create a two-tiered social system with the children of the socially and economically better off families attending private schools. Furthermore, graduates of private school are believed to

be disproportionately represented in the higher echelons of society. Thus they are perceived to receive more than average opportunities for success (Muller, 1988; Bezeau, 1989).

Some critics of public schools argue that public schools enjoy a monopoly on public education (Everhart, 1982; West, 1970, 1982; Bergen, 1982). The lack of competition causes inefficiency and waste. The proposed answer to the monopolistic and self-destructing tendencies of public education is private sector education as private schools are closer to the market and are better able to discern changes in public preferences and to respond to those changes (Federation of Independent School Associations, 1988, pp. 12-14). The argument rests on the belief that the private schools must satisfy their supporters or lose them to the publicly funded system.

Supporters of the public system do not agree with the assumptions that competition from the private sector is the best medicine for an ailing public school system. They argue instead that rather than leaving the public system parents should use pressure to bring about educational change. This argument utilizes the framework of "exit, voice and loyalty" (Hirschman, 1969). Muller (1988) argues that more public support for public schools could produce beneficial effects such as greater flexibility and choice in methods of instruction and curriculum.

Another counter-argument to the efficiency theory of private schools is the selectivity that private schools are thought to exercise in the recruitment of their students. Private schools are criticized because financial selection occurs based on the willingness or ability of parents to pay tuition fees. Selection may also occur by religion or ideology, and academic superiority. Private schools may refuse to accept some students or may expel others while public schools are not easily allowed to expel or refuse admission to students (Muller, 1988).

Private sector education is often perceived as a threat to public sector education by the supporters of public schools. The debate over the appropriate divisions of education include

several arguments and counter arguments. Supporters of private schools raise the issues of choice and pluralism, double payment, and public school monopoly and market efficiency. Public school supporters argue for equality of education, social cohesion, selectivity and educational reform.

Discussion of the public and private dimensions of education may be linked to anticipated results and conclusions in this dissertation. Arguments for choice, pluralism, public school monopoly and market efficiency are somewhat satisfied by operation of fees for extras and consumables. At the same time, public education is secured by maintaining a core educational program that is largely free of fees. This policy accounts for the infrequency of tuition in public schools. Standards of equality, social cohesion and inclusiveness are maintained for promoters of public education by keeping student charges at reasonable levels.

In the section below, an attempt is made to link school fees and ethnicity. Studies on school fees have not investigated connections between school fees and ethnicity. Nevertheless, for the purposes of this study, it is possible to explore them by briefly considering ethnicity in private education and the meaning of tuition fees for minority groups.

### Ethnicity and Private Education

Ethnicity has been established as an important social category for the study of social and educational problems. Glazer and Moynihan (1975) use the term "ethnic group" to refer not only to minorities but to all the groups of a society characterized by a distinct sense of difference owing to culture and descent, that are "capable of renewing and transforming themselves" (p. 4). The authors argue that although conflicts between ethnic groups have long existed, in the

last few decades there have been more such conflicts and they have been more intense. Ethnic conflicts are so labelled because of the extent to which the ethnic group is now defined as an interest group (pp. 5-8)

A Canadian perspective on "ethnic pluralism" within the context of French-English relations is offered by Porter (1975). Porter rejects the revival of ethnicity arguing that "the saliency of ethnic differences is a retreat from the liberal notions of the unity of mankind" (p. 303). Porter favours doing the "morally desirable and sociologically possible" to solve "problems of non-white deprivation and inequalities through the liberal emphasis on individuals rather than group rights" (p. 304).

The most important educational problem for minority students in North America is equality. Education has long had a function as the key to social integration and mobility as successive waves of immigrants from Europe, Asia, Latin America and Africa arrived in North America. Education has also been perceived as an indirect method of alleviating poverty (Levine and Bain, 1975). The 1954 Supreme Court ruling in *Brown versus the School Board of Topeka, Kansas* is often cited as a watershed case in the development of education as an antipoverty strategy. Coleman (1966) pointed out that this was the first time that "effective equality" in terms of some measure of school output, had been formalized. Manley-Casimir and Housego (1970) provide a Canadian perspective on equality of educational opportunity.

In 1966, Coleman et al. defined five relevant meanings of the concept of equality of educational opportunity, sub-divided under inputs and outputs (Levine and Bain, 1975). Essentially, the researchers showed that differences in existing school inputs made relatively small differences in school outputs. Those results had a profound effect on the educational establishment including taxpayers resistance to rising school costs and demands for more accountability (Levine and Bain, 1975, p. 4).

At least two central conclusions are apparent in the inequality controversy. First, by almost any measure of educational input and output certain ethnic minority students rate consistently lower than white middle class students (Coleman et al., 1966; Maestas, 1981; Simpson, 1981; Roth, 1983; Matute-Bianchi, 1986). Second, the unequal student outcomes translate into social and economic inequality. The central problem of an ever-growing body of research concerned with the relationship between ethnicity and school performance is an explanation of why different groups of ethnic minority students perform at different levels (Foley, 1991; Gordon, 1980). Ogbu (1978; 1988) focuses primarily on the school achievement problems of Black American students but his work is easily related to other minority students.

According to Ogbu, minority groups in the United States fall into three types. One type, "autonomous minorities", possesses a distinct cultural identity, are not free from discrimination, but are not socially, economically, or politically subordinated. Their culture demonstrates and encourages school success. Jews and Mormons represent this type of minority. "Immigrant minorities", the second type, are people who have moved voluntarily to the United States because they believe that immigration would improve their lives. Immigrant minorities do not experience persistent disproportionate problems in social adjustment and academic achievement in school. Chinese, Punjabi Indians, and Hispanics are examples. "Castelike or involuntary minorities" are the third type. They were originally brought into the United States society through slavery, conquest, or colonization, relegated to menial positions, and denied true assimilation into American society. American Indians, Black Americans, Mexican Americans, and native Hawaiians are examples. Involuntary minorities experience difficulties with social adjustment and academic achievement in school. Ogbu focuses on immigrant and nonimmigrant minorities (pp. 140-141).

Nonimmigrant minorities experience greater academic problems than immigrants, because of problems caused by three community factors. They include: 1) opportunity structure, survival strategies, and folk theories of getting ahead; 2) the degree of trusting relations with whites and white-controlled institutions; and 3) primary and secondary cultural/language differences. The collective or social identity are different for the two types of minorities partly because the minorities perceive, interpret, and respond differently to the educational problems they encounter in school. (pp. 141-149).

In an earlier section on public and private education, it was argued that private education tended to be selective and elitist. Selectivity may occur on the basis of race or ethnicity, wealth, religion, ideology, or academic performance. The factor singled out here for discussion here is that of ethnicity. To the extent that the families of students from certain minority groups are over represented among low income groups then private schools are likely to be less accessible to them than middle or upper income families.

Are tuition fees a barrier to private schooling for ethnic minority students? Bergen (1989) suggests that of 1500 private schools in Canada only 50 may be judged to be elitist. In the latter group, tuition is beyond the means of the average Canadian family. Many of those schools are also elitist academically, in that admission and continued registration is dependent on scholastic performance (p. 15). Bezeau (1989) describes schools of this type as being very traditional, residential and expensive. Many have moved from being single-sex to coeducational schools (p. 188). A review of the selection of students by private schools in Quebec identified two phases to this selectivity: self-selection by parents and school selection of pupils (Bezeau, 1986). Findings showed that 26% of the parents who sent their children to public secondary schools did so because of the high cost of private schooling; and eight per cent of students who dropped out of private secondary schools for known reasons did so because of financial

difficulties. Evidence from one study suggested considerable self-selection on economic and educational grounds (Bezeau, 1989, p. 33). Other findings support the assertion that private schools in Quebec siphon off the best students and leave the others to the public schools. Bezeau (1989) makes the case for study of the heavily subsidized private schools in Quebec and related questions of justice, due process, and equity.

Ethnicity may refer to all groups of a society characterized by a distinct sense of difference owing to culture and descent. Within the North American context, equal education is the overriding concern for ethnic minority students. Researchers have uncovered two central substantive findings in this connection. Certain minority students rank consistently below white students on measured educational outcomes. Those unequal outcomes lead to social and economic inequality. Characterizations of minority groups as involuntary and immigrant minorities may explain some of the educational and social outcomes. Evidence suggests that only a small percentage of Canada's private schools are elitist and expensive. However, selection of students attending all private schools is done by parents and schools. The extent to which selectivity occurs on the basis of ethnicity and social status remains unclear.

Ethnicity is commonly included as an important demographic variable in the analysis of educational problems. In linking this factor with fees in public education it is presumed that different patterns will emerge. For instance, based on the comments of principals and teachers it may be inferred that given groups of students face more or less cumulative costs because of the types of programs pursued. Where sufficient data are available, they may show, for example, that First Nations students pay disproportionately higher fees than other ethnic groups, if those students are over represented in vocational and technical courses. By the same token, Chinese and South Asian students may not be similarly affected.

## Principles of Taxation

In this and subsequent sections a taxation framework for the investigation of school fees is developed. It is worth mentioning that other perspectives, using a political model for example (Peters, 1991), could be usefully employed as well. A taxation approach is used because the attributes of fees closely resemble those of taxes. The link is most obviously apparent where certain types of direct charges are specific benefit taxes.

School finance can be divided into three stages: generating, distributing and spending revenues (Guthrie et al., 1988, Garms, Guthrie and Pierce, 1978). The following review of the principles of taxation focuses on the generation of funds for public education through taxation which relies primarily on three types of taxes: income, sales and property.

There are three principles of good taxation policy according to selected literature on public finance (Musgrave et al., 1987; Benson, 1978; Eckstein, 1973; Peters, 1991; James and Nobes, 1983) First, taxes should be equitable which means both the benefit principle and the ability-to-pay principle must be given careful consideration. Second, the efficiency rule requires reduction of harmful effects in the economy such as distortions in consumer choices caused by taxes. As well, the efficiency of a taxation policy calls for some evaluation of specific tax yields and elasticities. The third principle requires that taxation be administered as cost-effectively as possible with respect to administrative and compliance costs.

The bases for levying taxes are: wealth, income, consumption, and privilege. A tax on wealth may be based on the ownership of property or inheritance with the amount of tax paid being dependent on the value of the property or inheritance. Arguments for and against wealth taxation are illustrative of the inherently controversial nature of taxation policy in the 1990's

(Maloney, 1992; McCready, 1992; Block, 1992). Income tax is based on the taxable income of individuals or corporations. The taxable income of a person or corporation is the income remaining after allowable expenses and deductions are made. A consumption tax is commonly called a sales tax especially if it is applied to all or most sales as with a general goods and services tax. When a sales tax is applied to a particular class of items (such as motor vehicles), it is referred to as an excise tax. A tax on a privilege is levied on the right of a person to pursue some kind of activity regulated by the state, such as with license fees (Guthrie et al., 1988, pp. 94-95; Lawton, 1987, pp. 19-20). Wealth, income and sales taxes at the point of sale are categorized as direct taxes, whereas taxes levied during the production of goods and services are categorized as indirect taxes (Lawton, 1987, p. 20). Direct taxes are those which are imposed initially on the individual or household that is meant to bear the burden. Indirect taxes are imposed at some other point in the system but are meant to be shifted to whoever is supposed to bear the tax burden.

A major objective of taxation is equity. It is generally agreed that the tax system should be equitable, that is, that each taxpayer should contribute his or her "fair share" to the cost of government. A variety of approaches may be taken in order to define "fair share". One approach invokes the "benefit principle". Another approach is termed the "ability-to-pay principle". Each principle is explained and discussed in turn.

#### Equity: The Benefit Principle

According to the benefit principle, an equitable tax system is one under which each taxpayer contributes in line with the benefits which he or she receives from the public service

(Musgrave et al., 1987; Eckstein, 1973). Non-users of those government services are not required to pay. Examples of charges regularly applied outside of government supplied services in the private market are: entrance, admission, and rental fees; user fees for participation in an activity; and license and permit fees (Mushkin and Bird, 1972).

Benefit taxation allows taxpayers to follow how their tax money is being spent. Most people would be unwilling to support government expenditure policies if they believed that they were not receiving benefits from them. Because the benefit principle relates a particular tax to particular expenditure decisions, a more rational or efficient use of resources is believed to be achieved. Application of the benefit principle of taxation policy allows the implementation of what may be termed "benefit taxes".

Examples of specific benefit taxes (or fees) are found in given situations.

Whereas the general benefit tax is of interest mainly as a theoretical concept, practical applications of benefit taxation may be found in specific instances where particular services are provided on a benefit basis. This may be the case where direct financing is made via fees, user charges, or tolls. Or certain taxes may be applied indirectly in lieu of charges, as is done in the taxation of gasoline and other automotive products for purposes of highway finance (Musgrave et al., 1987, p. 212).

This technique is considered to be feasible and desirable under certain conditions.

The case for finance by direct charges to the user is clear-cut where the goods or services provided by government are in the nature of private goods, i.e., where consumption is wholly rival. Benefits can be imputed to a particular user who can be asked to pay. The issuance of licenses, the financing of municipal transportation, and the provision of airport facilities are more or less in this category. Where benefits are internalized, the government may act in a capacity similar to that of a private firm and the same principles of pricing are appropriate. As has been pointed out in recent years, a considerable range of public services might be placed on this basis, thereby easing the pressure on general revenue finance. By using a market mechanism, a more efficient determination of the appropriate level of supply becomes possible (Musgrave et al., 1987, p. 212).

Eckstein (1973) states that although fairness is one of the basic ideas behind applications of the benefit principle, this form of taxation provides a substitute for the market test (p. 64). As an example, local school taxes are grounded in the benefit principle applied on a district-wide basis. Explanation of why the benefit principle is not applied for all taxation requires consideration of the concepts of public or social goods, private goods, and efficiency.

According to James and Nobes, (1983) a pure public good has two important features. First individuals cannot be excluded from consuming it and, second, consumption by one individual does not prevent anyone else from consuming the good (p. 8). National defense is a good example. In contrast, a private good when consumed by one person is unavailable for consumption by another person. Also, if a particular good is consumed by one person another person is excluded from its benefits (Musgrave et al., 1987, pp. 43-44). Food and clothing are examples of private goods provided through the market process.

The foregoing definitions of sharp distinctions between social goods and private goods do not obtain in the real world because in reality mixed situations exist giving rise to mixed goods such as education (Musgrave et al., 1987, 65). The major outcome and difficulty in addressing goods with mixed goods characteristics is the generation of good or bad externalities. For example, the private sector may under produce external benefits and over produce external costs. Subsidies or taxes are possible methods of creating desirable policy solutions (James and Nobes, 1983).

It is asserted that the market mechanism alone cannot perform all economic functions and that public policy is needed to guide, correct, and supplement it (Musgrave et al., 1987, p. 4; James and Nobes, 1983). While the market mechanism is well suited for the provision of private goods the same is not the case for social goods. First, it would be inefficient to exclude any one consumer from partaking of the benefits when such participation would not reduce

consumption by others. Second, the application of exclusion is frequently impossible or too expensive. Thus, the market cannot function because left to itself it would tend to underproduce public goods (James and Nobes, 1983, 8).

Economic efficiency or "an optimal allocation of resources" is defined in terms of "Pareto efficiency".

A particular allocation of resources is said to be Pareto-efficient if no rearrangement of resources could make one person better off without making someone else worse off (James and Nobes, 1983, 22).

In the real world, the concept of efficiency may be modified so that the requirement is that the gainers gain more than the losers lose.

According to Eckstein (1973), the ideal principle for public budget decisions employs cost-benefit analysis, i.e., that the benefit of the last dollar spent is greater than that dollar of cost. When related to Pareto efficiency, this analysis would mean that expenditures for each public purpose would be pushed to the point where marginal social benefits equal marginal social costs. The caveat is that the essential characteristic of external effects is that private costs and benefits differ from social costs and benefits (James and Nobes, 1983, 23). For example, an industrial firm imposing costs (noise, pollution, congestion) on a surrounding community, if left to itself would overproduce goods. Similarly, external benefits of refuse collection in an urban area is greater for the community as a whole than for the individuals whose refuse is collected. The market would tend to undersupply the optimal level of such a service since external benefits would not be taken into account. Pareto efficiency and benefit-costs analysis are directly translatable into the benefit taxation principle where spending decisions are made by focusing on the margins, the point at which diminishing benefits come into play.

Efficient allocation of resources through the market involves the production of what consumers want most in the cheapest way. Solving allocation through the market has the advantage of inducing consumers to reveal how much of a service they want and how much they are willing to pay without utilizing centralized decision making. In the case of social goods, it is impossible to operationalize optimal levels of production and distribution. A political process or voting system is needed to induce the revelation of preferences. It is suggested that the voting process approximates an efficient solution (Musgrave et al., 1987, p. 63).

In theory, under the benefit principle, equity is secured when taxpayers contribute in accordance with the benefits they receive from public services. Benefit taxes may be applied where particular services are provided on a benefit basis and where direct financing via fees, user charges, or tolls is viable. Benefit taxation may not be applied for all taxation requirements because of the nature of services which are categorized as social, and mixed. The market mechanism fails in the adequate provision of social services. Implementation of the benefit principle appears to meet the criterion of horizontal equity as all taxpayers using equal amounts of a service pay the same amounts.

A good example of a tax based on the benefit principle is a highway fund generated by gasoline taxes. The earmarked money is used to construct and maintain national highways and the amount contributed by each person is related to that individual's consumption of gasoline and use of those highways (Guthrie et al., 1988, p. 96; Eckstein, 1973). Situations where it is difficult to assess either benefits received or contribution to costs make it difficult to implement taxes based on the benefit principle. For instance, expenses for policing are thought to be very difficult to allocate on a benefit or cost basis. Also, taxpayers who would refused to pay for a pure public good like national defense would derive the same benefits as those who contributed (Guthrie et al., 1988, pp. 96-97).

The attributes of benefit taxes have some relevance to school fees. First, school fees often pay for items the benefits of which could be easily imputed to particular students. But education as a service possesses mixed good characteristics. The difficulty is determining what educational items and activities are to be classified as private consumption and social benefits as benefits are not completely internalized or externalized. As Guthrie et al. (1988) note, the statutes of states in the United States usually specify that school-age children should receive free education. Thus tuition or user charges are not usually permissible as an alternative to taxation for public education. Some items and activities which these authors propose as possible areas for fee charging are textbooks and specific services not considered part of the normal educational process, such as transportation to out of town football games and provision of certain after school activities (p. 127).

Conceptually, it is possible to divide programs along the lines of core or required programs and extracurricular programs. Public schools could therefore be supplying free public education to meet students' graduation requirements while at the same time offering students more private benefits through voluntary extracurricular programs and activities.

#### Equity: The Ability-to-Pay Principle

The alternative principle of equitable taxation is based on the rule that people should contribute to the costs of government in line with their "ability-to-pay". Under this approach, a given sum of revenue is required and each taxpayer is requested to contribute according to his or her tax paying capacity. The ability-to-pay principle calls for distribution of the tax burden in line with horizontal and vertical equity (Eckstein, 1973, 55). For income tax purposes, people with the same income should pay the same tax, thus observing equal treatment or

horizontal equity. The vertical equity rule proceeds on the reasoning that "different amounts of tax should be paid by people with different ability if they are to experience equal burden" (p. 214). Problems arise as to what is the proper measure of ability-to-pay (Eckstein, 1973).

Because the bulk of taxes are paid mostly from income, in order to judge whether or not the equity of a tax is consistent with the ability-to-pay rule, comparisons of the amount of tax paid with income levels have to be made. On the bases of such comparisons taxes may be said to be "proportional", "regressive", or "progressive" (Eckstein, 1973). According to Guthrie and associates (1988, p. 97) if three groups of people all having different levels of income pay one percent of their income in tax then they are paying a proportional tax. If among the same income groups those with the lowest incomes paid two percent of their income and the highest income group paid one percent, then the tax is said to be regressive. Finally, if the lowest income group paid one percent of their income in tax and the middle and highest income groups paid two percent and three percent respectively, then the tax is called a progressive tax.

The income tax is more nearly based on ability-to-pay than any other tax and as progressive taxation supports the usual methods of taxation for schools and other public services. A progressive tax, theoretically, does not tax away from households the money necessary for a minimum standard of living. However, in the case of the sales tax while horizontal equity is achieved, since people who spend the same amount pay the same amount of tax, vertical equity is violated. The burden of the sales tax falls almost entirely on the purchaser. According to Guthrie et al. (1988), to evaluate this burden one must consider how expenditures compare with personal income purchases regardless of income. In general, poor people spend a greater percentage of their income than wealthy people. Therefore sales taxes are regressive in spite of exemptions for food, drugs, and rents (pp. 110-111).

It is proposed that implementation of equitable taxation in line with ability-to-pay requires the definition of a specific index by which ability-to-pay is to be measured (Musgrave et al., 1987; Eckstein, 1973). Ideally, this index would encompass all forms in which economic welfare is derived, including leisure as well as present and future consumption. Unfortunately, such a comprehensive index is not feasible, and the value of leisure in particular cannot be measured. Income is therefore the most widely used general measure of economic capacity. Determination of the proper distribution of the tax burden among unequals involves complex considerations of vertical equity. The principle of vertical equity may be formulated so as to call for equality of sacrifice. According to Musgrave et al. (1987), this may or may not require progressive taxation depending on how "equal sacrifice" is defined.

Vertical equity has been viewed in terms of an equal sacrifice rule. Taxpayers are said to be treated equally if their tax payments involve an equal sacrifice or loss of welfare (as measured in income). If the level of income (welfare) is the same for all taxpayers, the equal sacrifice rule calls for people with equal income to contribute equal amounts of tax. People with different incomes should pay different amounts. Economists are concerned with how these amounts should differ and in particular whether or not equal sacrifice requires progressive taxation. The sacrifice idea is a more detailed explanation of the application of vertical equity (Musgrave et al., 1987; Benson, 1978; James and Nobes).

The major difficulties associated with vertical equity and progressive taxation are presented by Guthrie et al. (1988). Both proportional and regressive taxes are deemed not to be based on ability-to-pay under circumstances of extreme poverty and wealth. Furthermore, a societal value exists that governments should intervene to reduce extremes in income inequalities rather than add to the burden of the poor through taxes (Chernick and Reschovsky, 1990). There is, however, no agreement about how progressive a tax should be in order to be

equitable. If it is close to being proportional poor people may be disadvantaged and if it is extremely progressive wealthy people may be treated inequitably (p. 98). Often in the case of personal income tax, loopholes are thought to exist which allow many deductions, exceptions, and adjustments to incomes, thereby reducing vertical equity (p. 106).

The distribution function of governments is frequently the major point of contention in the determination of public policy. Issues of distribution play an important role in determining tax and transfer policies (Musgrave et al., 1987, p. 9; James and Nobes, 1983). A fundamental question is what constitutes a fair or just state of distribution of income and wealth. Musgrave et al. (1987) acknowledge that modern economic analysis has largely avoided this problem. Different normative views of taxation imply alternative contractual setting (Musgrave, 1992). Economic efficiency, as defined earlier in this section, exclude distributional considerations.

The solution to social inequalities involves considerations of social philosophy and personal values. A variety of solutions have been proposed including the view that distribution should meet certain standards of equity (James and Nobes, 1983). Application of the proposition that people should be taxed in line with their ability-to-pay is an example of how a tax structure can be used as one part of a distribution policy. However, two major problems arise when implementing a fair pattern of distribution. The first is it is difficult or impossible to compare the levels of satisfaction which individuals derive from their income. The second is that as stated earlier redistribution policies may interfere with particular consumption and production choices, thus imposing some efficiency costs.

The ability-to-pay rule requires distribution of the tax burden in accordance with horizontal and vertical equity. Horizontal equity would mean that taxpayers with equal taxpaying capacity would pay equally. Vertical equity would require that taxpayers with unequal capacity pay correspondingly different amounts. On the bases of income tax comparisons, taxes

are defined as proportional, regressive or progressive. Proportional taxation holds when households with differentially higher income levels pay the same percentage of income tax. Regressive taxation occurs when those households with the lowest incomes pay the highest percentages in income tax. Progressive taxation calls for low income households to pay lower percentages of income tax than high income households. Income tax is central to the notion of ability-to-pay. As progressive taxation, it supports methods of taxation for schools and other public services. The principle of vertical equity may require equality of sacrifice. Equal sacrifice may mean equal absolute, equal proportional, and equal marginal. Many difficulties and distributional issues are associated with implementation of vertical equity and progressive taxation. Extremes in income inequalities exist in all societies and governments are often expected to function to redistribute wealth.

School fees have the potential to be vertically inequitable if students coming from lower income households pay the same as those from households with higher incomes. This possibility exists within and among schools and districts. Therefore the issue of ability-to-pay arises.

Both the benefit principle and the ability-to-pay principle have shortcomings. The chief weakness of benefit taxation is that it will allocate that part of the tax bill which pays for private goods and the part of social services with private good characteristics but it cannot handle taxes needed to finance transfer payments and facilitate redistribution of wealth. If fees are to be considered an equitable way of financing services, then it has to be assumed that a "proper" state of distribution exists to begin with. In contrast, the ability-to-pay approach better meets the redistribution problem but it leaves the provision of public services somewhat open-ended in terms of costs and appropriate levels of taxes. Neither approach is easy to interpret or implement. In order to operationalize the benefit principle costs and benefits for individual taxpayers must be known. To apply the ability-to-pay criterion, it must be clear how ability is

to be measured. Given the limitations of each approach, both principles have to be taken into account when designing and applying an equitable tax structure.

### Efficiency Costs of Taxation

#### Excess Burden of Taxation

Efficiency in the taxing process has two major requirements. First, the burden of taxation placed on taxpayers should be minimized. Consideration of this rule is linked in this literature review to tax yield and elasticity. Second, administrative aspects of taxation should be as economical as possible. The first criterion will be addressed in this section and the second one will be discussed in a later section.

Taxes generally interfere with economic decisions and distort choice. This distortion imposes a burden on taxpayers that is referred to as "excess burden", "dead weight loss", or "efficiency cost" (Musgrave et al., 1987, p. 273). When a tax affects relative prices and leads individuals to substitute one form of consumption or activity for another then substitution effects are said to occur (James and Nobes, 1983, p. 24). Benson (1978) used the term, "economic neutrality", to indicate what should be the ideal outcome of a new tax. Ideally, a tax should not distort consumers' spending patterns nor affect decisions of households with respect to savings and investments. It should have neither positive nor negative effects on work incentives and choices of alternative means of production. The unfavorable effects of levying the taxes should not cancel out the good effects of the services the taxes support or lead to other damages to the

private economy. Taxes which meet these qualifications are considered to be economically neutral (Benson, 1978, p. 274).

Distortion caused by taxes is a burden to the taxpayer. Efficient tax policy, therefore, should minimize this burden. While a head tax would avoid this cost, it would be unacceptable on equity grounds. Equitable taxes based on the benefit principle and the ability-to-pay principle must be based on economic indices such as income, consumption, or wealth and as such do interfere with economic choices, thereby causing an excess burden. The task of tax policy is to reach a compromise solution which allows for equity and efficiency. Musgrave et al. (1987) suggest that among equally equitable taxes, the more efficient one should clearly be used but a less efficient one may be preferable if the tradeoff between equity and efficiency so indicates (p. 273).

A concrete example of what happens when government places a new excise tax on a particular commodity is offered by Benson (1978). Ordinarily the retailer passes on the tax to the consumer resulting in a higher price for the article. If households continue to buy some amounts of the commodity, the total tax revenue of the government increases. This flow of funds to the government allows a shift in production from the private sector, and the intended effect of the tax is to achieve such a shift. But there is also an unintended effect. The price is seen by the seller as excluding the tax, while the price to the buyer includes it. The tax drives a wedge into the pricing system that results in underproduction of heavily taxed goods (p. 274). Underproduction occurs also where persons choose to collect welfare payments rather than to work. Moffitt and Rangarajan (1991) concluded that changes to social assistance have no detectable influence on work incentives of female heads of households. Evidence suggests that taxation causes fairly little reduction in the labour supply of prime-aged married males (Eckstein, 1973; Triest, 1990) According to Eckstein (1973), the most important distortion is the social

waste of tax avoidance. Detailed political analysis of the problems of tax evasion and avoidance are available in Peters (1991).

It is suggested that empirical questions about economic effects of a particular tax provision deal with human motivation (Benson, 1978, p. 275). Economists are not equipped to analyze human motivation and therefore substantial problems arise in attempting to measure the economic effects of a tax. The specific provisions of a levy do not exist in isolation from other forces that impinge on economic performance. In some cases, the direction of the effects are uncertain. It is reasonable to expect that the various tax instruments have some harmful effects which vary from tax to tax. Examples of harmful effects are reducing the incentive to invest, consuming valuable human talent in tax litigation, and distorting household consumption patterns.

According to Guthrie et al. (1988), in addition to intended or unintended economic effects there are also social and political effects of taxes. An important alleged social effect of property tax has been the abandonment of low-rent housing in cities because property taxes on top of other expenses exceed rental income. Often taxes are intended to have a social or economic effect. An excise tax on tobacco is intended, among other things, to discourage smoking, and an import tax on shoes is intended to protect a domestic industry. An income tax credit for installing home insulation is intended to encourage energy conservation (pp. 104-105). A problem with taxes designed for such specific effects is that they may, as a result, become less equitable.

In sum, the efficiency criterion requires that the tax burden be minimized. Economic costs to taxpayers of a new tax should be minimal and thus reduce the likelihood of influencing consumers' choices in terms of consumption and leisure. All taxes interfere with economic decisions and distort consumer choice creating efficiency costs. Efficient tax policy may require

that a compromise be struck between equity and efficiency. Tax instruments have some harmful effects on the economy which vary from tax to tax. In addition to economic consequences, tax policies often produce social and political effects.

The relevance of the economic efficiency component to school fees involves the choices parents and their children make when faced with fee-attached courses or activities. One effect of fees could include reduced participation in particular activities and courses because of the costs involved. This could result in some parents underinvesting in their children's education when their career goals are considered. Another negative effect of school fees might be evident if parents were forced to choose between paying a given fee and consuming household or leisure goods or services. A third negative effect may involve parents and students in court or procedural cases associated with school fees. However, these potentially harmful effects may be weighed against the possible positive effects school fee might produce: offering more attractive programs, meeting the needs of particular groups of students, raising the necessary revenue in the context of general revenue limitations in order to introduce more choices for student, and making student more conscious of the costs.

### Tax Yield and Elasticity

Taxes are necessary but pose severe difficulties for elected officials. Citizens like the benefits they receive through the public sector but they do not like to pay the price for those services, which are their taxes (Peters, 1991). In a period of increasing incomes an elastic tax is favoured by elected officials. When incomes increase, tax yields increase even faster, providing money for new programs without necessitating higher tax rates. However, there is

a negative side to "income elasticity of yield" according to Guthrie et al. (1988, p. 105): an elasticity of greater than one implies that when income decreases, tax yield will decrease even faster. Therefore a recession can be problematic for a government that has based its operations on the expectation of ever-increasing tax revenues.

The yield of a tax is its ability to generate revenue. In evaluating a tax it is necessary to compare its yield with those of alternative taxes and with the cost of administering the tax. Examples of small yields are excise taxes on articles such as paper clips, salt and soap. Examples of high yields would be an excise tax on automobiles or federal individual income. In general, the larger the base of a tax the greater its potential yield. Thus an excise tax is generally not capable of as great a yield as a general sales tax (Guthrie et al., 1988).

Elasticity is a notion closely related to tax yield. A tax whose yield increases at a greater rate than that of income is said to be elastic; one whose yield increases at a slower rate is said to be inelastic. For example, an excise tax on each bar of soap is likely to increase only slightly even with dramatic increases in personal income. Thus one would expect the tax yield on soap to increase less rapidly than incomes, and would thus term the tax inelastic. However, the elasticity (responsiveness) of personal income tax has been in the range of 1.5, making it a very elastic tax. Elastic taxes, such as the income tax, are of advantage to governments in a period of expanding income. The reason is that government tax income increases more rapidly than income in general, whereas government expenses tend to increase at the same rate as that of incomes in general. This means that in an expansion period the government has a continuing excess of income, which it may use to finance new programs (Guthrie et al. 1988, p. 102-103). In contrast, an inelastic tax such as the property tax is of more advantage during periods of recession because its yield does not drop as rapidly as do incomes.

In general, a progressive tax is an elastic tax and a regressive tax is an inelastic tax (Guthrie et al., 1988). This follows from the definition of a progressive tax as one that collects a higher percentage of a wealthy person's income than a less wealthy person's income. If incomes of all persons increase, a progressive tax will take a greater percentage of the incomes of all. When average incomes increase, a progressive tax has an increased yield both from the increase in income and from the increase in the percentage of that income that is taken. Thus, yield increases faster than increases in income. However, when incomes fall, the elastic tax reduces its yield (and its demands on those with high ability-to-pay) much more quickly than the inelastic one, thus making the elastic tax more regressive and the inelastic tax more progressive.

Briefly, then, the yield of a tax is its ability to generate revenue while the elasticity of a tax is the rate at which yield increases if personal income increases. In general, the larger the base of a tax the greater its potential yield. Elastic taxes tend to be progressive taxes and are favoured by governments in periods of economic growth.

Actually, imposition of school fees for current programs would not constitute new taxes because the programs are usually provided through general taxes. When viewed in this way, they become more equitable when they influence choices. Within schools several different types of fees are paid. School fee yields tend to be small but where flat-rate fees are levied upon the entire population of a given school the resulting yields may be substantial relative to the operating budget of that school. Flat-rate fees are somewhat similar to lump-sum taxes, and tend to be more regressive in nature.

Income taxes tend to be progressive as well as elastic taxes. It is likely that as personal incomes increase parents and students spend higher amounts of money on school fees. Thus, amounts of money spent on fees may differ noticeably among districts and schools of varying degrees of wealth. Also, during times of recession, household incomes may shrink and produce

a corresponding effect on the willingness of parents and students to pay school fees. If schools wish to apply progressive fees, higher fee could be imposed on students who come from wealthier homes than upon those from low income homes.

### Administrative Aspects

Direct costs arise from actually running a tax system. A tax is administratively feasible when the given level of government can employ staff of sufficient competence to deal with technicalities and can control taxpayer mobility to reduce tax avoidance to a tolerable level (Benson, 1978, p. 278). The desired level of service should be available at minimum cost. The costs to the public sector may be termed administrative costs and those to the private sector may be called compliance costs (James and Nobes, 1983).

Five criteria for efficient administration of taxes outlined in Musgrave, et al. (1987) James and Nobes (1983) and Eckstein (1973) include: personnel and equipment requirements, auditing and enforcement procedures, complexity of the tax structure, centralization, and compliance. They are all relevant to fees in this study. The first four criteria are taken to be different aspects of the technicalities of tax administration and are interpreted from the point of view of the taxing authority. The fifth one, compliance, is taken to be largely an issue of taxpayer willingness to pay.

First, choice of appropriate technologies and administrative procedures are of central importance. Computerized systems can reduce costs and provide faster, more detailed information. The larger the system the more selective auditing procedures are likely to be. Second, careful thought has to be given to how far auditing and enforcement procedures should

be carried. With taxation, auditing and enforcement procedures are not efficient when carried to the point where at the margin, an additional dollar of cost brings in less than a dollar of revenue. Third, some taxes, such as a head tax, are easier to administer than others, such as a sales tax but the former is less equitable than the latter. The need to have equity increases the complexity and thus the administrative and compliance costs. Fourth, tax administration in a decentralized system is more complex than in a highly centralized system. Bolton and Farrell (1990) advise that the delay and duplication inherent in decentralization need to be weighed against needs for urgency and discretion.

The fifth criterion, better compliance, can be secured either by threatening a higher penalty if the offender is caught, or by spending more on enforcement so as to increase the probability of catching offenders. The first rule is cheaper than the second one, but is less acceptable on equity grounds. Compliance costs for businesses and individuals can vary substantially depending on the extent of operations and what is involved in meeting compliance requirements (Guthrie et al., 1988). Costs include money spent on tax accountants and guides, time spent on completing returns, anxiety experienced as a result of tax operations and costs to third parties such as friends and relatives. Compliance costs are much more difficult to calculate than administrative costs (James and Nobes, 1983). Musgrave et al. (1987, p. 273) propose that policy must choose between equity considerations which may call for more complex law and the saving in compliance costs which goes with simplification.

The foregoing subsection outlined and discussed five criteria for efficient administration of taxes. Four of the criteria, personnel and equipment needs, auditing and enforcement procedures, complexity of tax structure and centralization are explained as different facets of the technicalities of tax administration. The fifth one, compliance, is explained in terms of taxpayer costs. Equity needs may increase the complexity of a tax structure and also the administrative

and compliance costs. Public policy must often choose between equity considerations which may demand a more complex law and savings in administration costs.

The administration costs of fees for schools and the compliance costs to students can be minimized. Five areas of concern are evident. One, schools could enhance efficiency by devoting sufficient school office personnel and appropriate equipment (e.g., computers) to the task. Two, school authorities have to make good decisions about how far to proceed with auditing and enforcing payment. Three, fee structures need to be as complex as necessary to ensure equity but not so complex as to raise administrative and compliance costs to unsatisfactory levels. Four, a centralized fee collection system appears to be more economical of school resources than a decentralized system. And five, school authorities are required to find ways to enforce compliance cheaply without violating equity. When they reduce as far as possible the resources (time and effort) needed in order to pay fees, they increase the level of successful student compliance.

Finally, schools may choose to consider the observance of a needs test rule as a basis for fee exemptions. But administrative costs and potential problems linked to privacy concerns may make it more viable for officials to have all students pay the necessary fees and address individual hardship cases as they arise. Equivalent indicators of need such as student receipt of school lunches and bus passes may be employed. Exemptions via fee waivers are administratively possible but may not work with full effectiveness due to student reluctance to discuss their financial need.

## Summary of Principles of Taxation

The theory on the principles of taxation is an analysis of the major concerns and issues which ought to be addressed by a comprehensive approach to a taxation structure. The principles discussed in relation to income, property, sales and privilege taxation when applied produce positive, mixed and negative economic and social effects. Tradeoffs often are called for among policy objectives of equity and efficiency. Examination of the principles and application of taxes reveals that school fees behave rather like taxes and thus fees may affect the consumption levels of education by students.

The connection between taxes and fees exists where certain types of fees may be classified as specific benefit taxes (fees, user charges or tolls). This classification has been accomplished by adopting the tax framework for fees. The framework includes both voluntary (privilege) and non-voluntary (income, wealth, consumption) taxes. There is an important difference between the two concepts in that taxes are regarded as compulsory payments whereas fees (and charges) involve voluntary transactions. Taxes like car insurance, health insurance, and other similar taxes constitute grey areas as they are voluntary but if not paid the consequences can be severe. When fees are compulsory for given educational services and materials, particularly where those services contribute to graduation requirements, they closely resemble general taxes. Therefore, school fees may be equitable with reference to the benefit principle and inequitable as seen by the ability-to-pay principle.

## Studies on School Fees

Broadly classified, two types of studies have been conducted on the subject of fees in public schools that are of particular interest in this dissertation. Unfortunately, the research has been conducted in the United States which poses some problems of applicability to the Canadian context. While there is considerable relevance to British Columbia schools, the differences in the value ascribed to public education between the United States and Canada suggest that generalizations should be guarded. A summary of findings and issues in studies focusing on the legal and financial aspects of fees is presented in the following sections.

### Legal Issues on Fees

A set of principal issues which give some structure to the legal debate on student fees in public education are discussed briefly in this section. First, the meaning of "free" public education has had to be established by the courts. Second, the type of fees to be allowed or prohibited and related issues about what constitutes a required or an optional public school program infuse the discussion. And third, there is a concern that equal education or, more precisely, equal protection under the law may be violated by the imposition of school fees of any kind.

All states in the United States of America but one (South Carolina) have constitutional mandates calling for establishment and maintenance of public schools by the legislature (Lang, 1977, p. 442). Most courts upholding fees have done so even in the face of state constitutional mandate for free schools (Appendix B). Despite two predominant approaches to the issue of school fees, courts have reached some consensus as to the limits of permissible and

impermissible fees. Courts have agreed that schools may charge fees for purely extracurricular items, such as admission to social events, yearbooks, and lunches (Kendall, 1984; Lang, 1977; Hamm and Crosser, 1991). Courts have also agreed that fees to maintain school buildings or to pay teachers salaries are impermissible tuition charges (Lang, 1976-1977; Kendall, 1984; School Law, 1971; Vetere, 1986). Similarly, courts have consistently held that matriculation and registration fees for required courses are unconstitutional charges on attendance (Gragg, 1975, 1976; Vetere, 1986; Kirkman, 1982).

Courts differ widely, however, when categorizing the broad middle range of educational materials and services. (Kendall, 1984; Kirkman, 1982; Vetere, 1986). Textbooks are a prime example of how courts differ in interpreting "free education." Michigan and Idaho courts deemed textbooks an integral and necessary part of instruction. Fees for textbooks are therefore unconstitutional in these states. According to Illinois' historical approach, however, because the state never provided free textbooks, the constitution sanctions fees for textbook despite the legitimate educational value of textbooks (Appendix C).

Courts have consistently excluded summer school from the prohibition against matriculation and registration fees because summer school supplements a state's compulsory education requirements. For example, in *Crim versus McWhorter* (1979), the Georgia Supreme court held that a public school tuition fee for summer school did not violate the constitutional guarantee of a free education (Hulsey, 1979). The court said that summer schools were not "historically or logically included in the free system of common schools mandated by the constitution and statutes of the state". It was noted that there was a scarcity of precedent in Georgia on the tuition issue. Hulsey (1979) concluded that the decision to allow summer school tuition fees meant that the court thought students' rights included free education at the times the state decided to provide it. Therefore, the bright student who took courses in the summer to get

ahead, or the slow student who was forced to attend to make up courses failed in the end received no more or no less than what all students were guaranteed free by the constitution. The students were required to pay. The court thought that summer school sessions were a convenience provided by the system for which a premium should be paid. The question of who decides educational policy was left up to elected officials in the legislative assembly.

Three tests have been established in three different cases to establish the principle that fees could not be charged for items considered necessary for education. The first was the test of "necessary elements" in the precedent setting *Paulson Versus Minidoka County School District*, (Idaho, 1970). The second was in *Bond Versus Public Schools of Ann Arbor School District* (Michigan, 1970) when textbook fees were declared unconstitutional on the basis that textbooks were "an integral fundamental part" of a free public elementary and secondary school system. The third test was stated by the Montana Supreme Court in *Granger Versus Cascade* (Montana, 1972). It was argued that if a given course or activity is reasonably related to a recognized educational goal of a particular school system then it constitutes part of the free, public school system and additional fees or charges cannot be levied directly, or indirectly against the student or his parent. If the course activity fails this test then reasonable fees or charges may be imposed (Kirkman, 1982, p. 78; Vetere, 1986).

It has been argued that the Idaho-Michigan "necessary" or "integral" to education tests resulted in a broad definition of free education and a correspondingly narrow free range. Consequently, Idaho, Michigan and other states that disallow fees "risk diminished quality in educational programs as state administrators struggle to match strained state revenues with ever rising costs" (Kendall, 1984, p. 123). In contrast, the critical aspect of the Granger court's test in Montana involved determining which courses or activities constituted part of a school's required academic program. Any activities that were credited towards graduation were judged

to be related to academic pursuits and constituted part of the free education system required by the state's constitution. Consequently, school boards may not charge additional fees for such activities. Boards may, however, impose reasonable fees for purely extracurricular items and activities that did not count towards graduation (p. 124). This more flexible approach is favored by Kendall as it is thought to ensure the development of an equal educational system which meets the needs of students and community alike.

When state courts have considered the legality of student fees, which so far has happened in fewer than one-fourth of the states, the central issue often is whether the fees interfere with equal access to public education. Rulings made on the basis of state constitutional provisions generally have struck down matriculation and academic fees. In several instances, courts have distinguished between fees for academic and nonacademic purposes. Typically, courts have considered fees for academic purposes to be more restrictive of free education than fees for extracurricular purposes. Court decisions may be interpreted as specific applications of the benefit and ability-to-pay principles. Court rulings upholding student fees for extracurricular and optional materials and activities are linked to the benefit principle and equity. Fee waivers and other administrative procedures address redistribution. Constitutional requirements for free education are linked to the protection of equal access to the required educational program without reference to the ability of parents to pay. General taxes are expected to provide this program.

#### Financial Aspects of Fees

In the financial studies, the major question posed has been: What are the types and amounts of school fees levied? (Foutch, 1975, 1978; Waters, 1969; Walker, 1953; Whaley,

1953; Wyatt, 1970). Variations exist on this central theme. Some researchers explore the relationship between student fees and student participation (Bulthaus, 1983). Others investigate interstate comparisons of costs in relation to curricular or extracurricular areas, per-pupil expenditure from taxes and geographical location (Nelson, 1962; Cameron, 1969). Stabler (1982), analyzed data concerning the use of fees as a means of increasing the available revenues and/or continuing certain programs of public schools in California. A number of factors have been identified in these studies as affecting types and levels of fee. Four studies (Bulthaus 1983; Foutch, 1975; Salloum, 1985; and Stabler, 1982) were selected for examination in this study as they provide important perspectives and findings on school fees. A list of the characteristics of the studies including samples, analytic techniques, variables and results appear below (Table 1).

The selected studies present obvious strengths and weaknesses. Collectively they illustrate examples of posing and answering precise questions about educational policy. Valuable information is provided which can form the basis for well informed administrative decisions. However, the studies are descriptive and atheoretical. Typically, the reviews of literature are narrow in scope and limited to earlier studies on legal and or financial aspects of fee assessment. Therefore, the investigations are not informed by accumulated knowledge from major disciplines such as sociology, economics, or politics. The question of why fees are imposed in public education in the first place never gets posed in any of the four studies. Although the issues of equity (Bulthaus, 1983; Stabler, 1982) participation (Foutch, 1975) and regressivity of fees (Bulthaus, 1983) are raised they are inadequately addressed and are not linked to social or political factors.

In terms of methodology, the studies used mainly survey instruments, questionnaires or interview schedules more or less structured. Bulthaus (1983) used a student survey instrument

and structured interviews with a sample of principals. The strength of this procedures was that students were asked to provide data unlike in other studies by Foutch (1975), Stabler (1982) and Salloum (1985) which used either district and/or school level administrators for data collection. However, in the Bulthaus study students were asked to estimate costs over the current school year which could have led to some inaccuracy of accounts. Where costs were unavailable on fee schedules principals were unable to provide certain item or activity costs. In addition, the districts from which the principals were selected were not necessarily representative of all of Iowa's districts in enrollment size, assessed valuation and urban/rural mix so generalizability was somewhat limited. Similar problems with accuracy of recorded data were presented in the other three studies as well. Definitional issues related to types of fees and the items and activities included or excluded as fees posed problems that become evident in next section.

### Three Types of Fees

Researchers have defined different types of fees as well as identified numerous items within each type for which student are commonly charged. One kind of fee may be called academic.

An academic fee is an assessment covering the costs for the purchase or rental of textbooks, workbooks, materials, supplies, uniforms, instruments, laboratory fees, subscriptions, lumber, and field trips which students are expected to pay while enrolled in a particular course (Bulthaus 1983, p. 47) .

Table 1. Characteristics of Four Studies on School Fees

	Author	
	Bulthaus, 1983	Foutch, 1975
Sample	22 public high school principals, districts	49 public k-12 schools in 8 districts
Analytic Techniques	range, mean, standard deviation	Percentages, range, mean frequencies
Independent Variables	student participation in educationally related activities; school districts; grade level; participation level	student participation in public schools: school types (elementary, high); fee types (academic, co-curricular, miscellaneous) and fee practices
Dependent Variables (instruments)	student fees; (interview schedule)	student fees and incidental costs (questionnaires)
Summary of results	student fees varied greatly within schools and among districts. Grade level, school size (and district size as perceived by principals) and participant level of student were related to higher fees.	fees varied within schools and among districts. Grade level and gender (in P.E.) were related to higher fees.

cont'd

Table 1 Cont'd

	Author	
	Salloum, 1985	Stabler, 1982
Sample	13 districts; 66 schools	22 rich and poor; urban, suburban, rural districts
Analytic Techniques	dollar amounts, per student amounts, provincial estimates, per student averages, percentages	frequencies, percentages, ranges, means, standard deviations
Independent Variables	public schools and districts: size, grade levels, location	school district educational practices, legalities, district wealth
Dependent Variables	sources and levels of private support: fundraising, fees, donations	types, numbers and amounts of participation fees
Summary of results	schools raise more private funds than districts from fund raising, fees, donations, and school sales School types varied in how funds were raised and spent.	wealthier districts charged higher and more fees than poorer districts. Legal boundaries of fees application clear.

Bulthaus (1983) reported that academic fees existed in 54 different items or categories. In another study, 20 subjects were itemized as areas where students incurred academic fees in grades 9-12 (Foutch, 1975). Neither Salloum (1985) nor Stabler (1982) focused on or itemized academic fees. In this study, curricular fees will be used to refer to what has been defined here as academic fees. However, textbooks deposits are excluded as part of the definition and a field trip represents a curricular expense only when it is specified as part of the requirements of a course.

A second kind of fee is an extracurricular fee. Bulthaus (1983) referred to fees in this area as student activity fees.

Student activities refer to those school activities which are voluntarily engaged in by students which have the approval of and are sponsored by the faculty, and which do not carry credit toward promotion or graduation (p. 9).

In that study, student participation costs were reported for 34 different activities, sports, or items. The term co-curricular activities used by Foutch (1975) approximates what is defined here as extracurricular activities. Stabler (1982) defines extracurricular activity as "any activity that takes place outside of the regular instructional program" (p. 17). In this study, the term extracurricular activity will apply to activities occurring outside the regular classroom instruction and will include sports, tournaments, clubs, social events, field trips and school sponsored entertainment.

A third kind of fee is paid by students for incidental items. Bulthaus (1983) reported 13 items in this category.

Miscellaneous expense refers to those expenditures not characterized as academic or activity costs and covers items such as insurance, locker rentals, pictures, and other no-subject related expenses (p. 8).

The same term was defined in a similar way by Foutch (1985, p. 13). This study adopts the meaning of incidental expenses employed by Bulthaus. The expenses are distinct from

extracurricular costs in that they are often for incidental expenses incurred by the school and are passed on to students for school mailings, agenda books, locks and lockers, yearbooks and the graduation ceremony. Also, incidental expenses for students' memorabilia, graduation and other items in this area are not usually considered to be a regular part of a school's extracurricular program. Schools generally apply incidental fees at the beginning of the year to all students or to a given grade level.

#### Amounts for Three Types of Fees

Of the four selected studies only two collected and analyzed data strictly for curricular programs (Bulthaus, 1983; and Foutch, 1975). Bulthaus (1983) found the five most expensive areas were: physical education, vocational education, driver education, instrumental music, and business. Physical education averaged \$40.55 and ranged between \$29.25-46.25. The lowest fee was for English with a mean of \$2.92 and a range of \$1.50-4.00 (pp. 59-62). In the other study (Foutch, 1975), the most expensive curricular fees were in: agriculture, auto-mechanics, band, industrial arts, language arts, and science. Means were not reported in this study for curricular fees. The range for agriculture was \$8.00-25.50. The lowest fee was paid in consumer education in the \$0-1.00 range (p. 82).

Three studies reported extracurricular fees (Bulthaus, 1983, Foutch, 1975 and Stabler, 1982). The most expensive per-student costs of participation in all activities were in boys' baseball. It showed a mean of \$86.56 and a range of \$18.00-110.00. Nine of the most expensive activities were athletic activities while the least expensive were those associated with clubs and organizations as they required no direct expense to students. A real savings was found

for students whose schools offered activity tickets. The mean activity ticket cost was \$8.39, with a range of \$7.50-22.50, compared to the mean costs for single admission tickets of \$60.35 (Bulthaus, 1983, p.13). Foutch (1975) reported similar findings. The three most expensive extracurricular events were in athletic supporting services: cheerleader (mean of \$55.00 and range of \$5.00-134.00), pom pom camp (mean of \$35.00 and range of \$35.00-35.00), and drill team (mean of \$30.00 and range of \$15.00-50.00). Less expensive events were dances, plays, and concerts. The lowest fee was for track, with a mean of \$1.50 and a range of \$1.50-1.50 (pp. 81-83). Stabler (1982) reported that fees charged for students in extracurricular areas varied dramatically. Means were not calculated but the amount of the fee ranged from as low as \$10.00 per year to as high as \$60.00 per athletic activity (type of activity was not specified in the study). The charge most often used by districts was between \$21 and \$40 per activity. The majority of districts charged for athletics by activity (p. 70).

Two studies reported on incidental fees. Bulthaus (1983) reported mean charges ranging from as high as \$150.00 to as low as \$0.25 in this fee category. The high fee was for senior pictures which averaged \$67.00 and the low fee was for lock or locker rental which carried no reported mean but had a high of \$1.00. Other expensive items were class rings and graduation announcements (p. 74). In the other study, (Foutch, 1975) high school students incurred expenses ranging from \$0.25 to \$100.00 in several miscellaneous areas. The lowest fee was for a parking permit (mean of \$0.38 and a range of \$0.25-0.50). The high fee was reported for graduation clothing (mean of \$47.50 and a range of \$30.00-100.00). Graduation related items tended to be the most expensive and class dues, school publications, assemblies, and lock and locker fees were the least expensive (p. 82).

Evidence indicated that, in general, students in terminal or vocational programs were among those students most likely to encounter school fees or charges (Bulthaus, 1983). Also

students in such programs were subject to higher charges or incidental fees than students in college preparatory or general programs. In contrast, fees for English, vocal music, mathematics, and social studies were seldom required by any group, with mean fees for these academic subjects varying from \$2.92-\$5.30 (Bulthaus 1983, p. 54).

Gender does not feature prominently in reports on school fees. However, two studies provided contradictory evidence on gender and fees specifically in physical education. Bulthaus (1983) indicated that in both boys' and girls' athletics, students were expected to buy special equipment such as shoes, golf clubs, tennis racquets, baseball gloves, swim suits, and practice uniforms to participate in various sports. Boys' baseball and girls' softball were the most expensive sports for students, with a mean cost of \$86.56 for boys and \$81.87 for girls (p. 98). However, Foutch (1975) observed that the costs to girls for participating in physical education generally exceeded that required for boys. Two thirds of the districts in his study reported that girls were paying up to \$9.50, which exceeded by \$2 the highest reported for boys (p. 82).

The differential amounts of money paid by students according to the three types of fees raise equity issues related to the benefit and ability-to-pay principles. A case for application of the benefit principle may be clear in academic-vocational areas where users' benefit is evident, that is, where students choose more, higher quality, or more elaborate projects than are required. Basic materials needed for students to complete technical-vocational courses that count towards their graduation may be exempt from student charges as occurs in general academic programs. In extracurricular and incidental fee areas, schools have traditionally applied the benefit principle with some provisions made for inability-to-pay.

### School and District Characteristics.

Evidence showed that all three kinds of school fees consistently increased with grade level (Bulthaus, 1983; Foutch, 1975; Salloum, 1985). Incidental expenses provided the best example. Seniors experienced considerably more expenses than those in the lower grades particularly for incidental items (Bulthaus, 1983). Mean expenditures for graduation items alone were reported to be \$179.19. Total average costs across all areas subject to fee charges were \$251.63 in grade ten; \$243.00 in grade eleven; and \$427.18 in grade twelve. Thus, costs for students in grade ten and eleven were relatively similar in magnitude but, at the twelfth grade, costs were double those of the previous grade. A large portion of this increased cost was directly attributed to graduation expenses (pp. 79-80). Foutch's (1975) findings corroborated those of Bulthaus for incidental expenses. In that study, graduation related activities cost high school students from as low as \$60.50 to as high as \$188.00 and were an average cost of \$145.17. Again, juniors paid less than seniors (Foutch, 1975, p. 82-83). Salloum (1985) reported that fees among schools, typed according to grade level, ranged greatly. Fifty percent of elementary schools had no fees, including deposits. For the other half the fee range was between \$0.01 and \$18.00. Secondary school fees ranged from \$0.00 to \$42.00 and senior secondary schools ranged from \$10 to \$56.00 (p. 134).

One reason for the observed differences in costs by different grade levels was the different participation levels of students. Bulthaus defined three types of students. Those who participated in the school programs to the extent that they met the graduation requirements were called "minimal-participatory students." Those who participated in both curricular and extracurricular activities to the fullest extent were called "maximal-participatory" students. Between these two extremes were those students with average participation. They enrolled in

a variety of subject areas and obtained the graduation requirements, as well as participated in two sports a year and attended half of the extracurricular activities in the school. The range of costs among the three kinds of students became greater as the amount of individual participation increased. The means for minimal, average and maximal participatory students were: \$63.45, \$146.68, and \$200.05 respectively. Costs by grade level for the three types of students were also dramatic. In grade 9, the minimal participatory student paid an average of \$67.02 and the maximal participatory student paid an average of \$364.90. By grade 12, averages were \$253.60 for the minimal participatory student and \$563.99 for the maximal participatory student. The total mean amounts for the minimal, average and maximal participatory students in grades 9-12 were \$466.78, \$1121.16, and \$1632.84 respectively (p. 84).

A second reason for the observed difference in fees by grade variation was the type of fees and mix of courses offered at different grade levels. Salloum (1985) suggested that schools with senior grades offer more specialized and optional courses as well as courses requiring the use of consumable materials leading to higher fees. He found that junior high schools had the highest per-student fee amount returned to students because of the number of deposits imposed at those grade levels. Senior grade schools turned over the highest per-student fee amounts to boards and to school programs. This was attributed to expendable supplies and transportation costs for both curricular and extracurricular programs (p. 133).

Another interesting finding was the role fees played in relation to other private funding practices among three different types of schools (Salloum, 1985). Elementary schools raised the majority of their funds from fund raising followed by fees and allocated the largest percentage of funds to curricular programs. Secondary schools raised the majority of their funds from fees, followed by fund raising and the largest percentage of funds were allocated to extracurricular programs. Senior secondary schools raised the majority of their funds from fees, followed by

profits from school sales, and the largest percentage of funds were allocated to extracurricular programs (p. 221).

In a study by Bulthaus (1983), Iowa public high schools were grouped according to size. There was no discernible pattern of increasing or decreasing costs among individual schools by school enrollment size. However, there was a difference found in the number of schools having fees in subject areas by enrollment size. It was concluded that students were more likely to encounter fees in subject areas in schools of successively larger enrollments (pp. 54-59).

One finding related to district socioeconomic status, indicated that among wealthy and poor districts, the wealthy ones charged higher fees as well as more extracurricular fees, and for a longer time (Stabler, 1982, p. 118). Whereas the low wealth group tended to charge between the range of \$10.00 to \$40.00, the high wealth group charged between \$40.00 to \$80.00. The low wealth group regularly used the semester or yearly fee more often while the high wealth group regularly used per activity fees (p. 73). The semester or yearly fee was cheaper for students attending several activities over a year than the accumulated costs of per activity fees. No real differences existed in the perceptions of school administrators about extracurricular fees on the basis of district wealth (Stabler, 1982, p. 119).

District size itself did not appear to affect school fees per se although it could indirectly affect student participation. Bulthaus (1983) found district size was not related to the number of fees (p. 101). However, principals in the largest districts were more likely than those in smaller district to perceive availability of transportation as a factor reducing student participation in some activities (p. 100).

### School Fees Administration

One study (Salloum, 1985) found no correlation between secretarial and administrative time and the funding practices by different types of schools in the collection or allocating of funds. This finding suggested that the use of secretarial and administrative time for private funding activities is a school decision. The study estimated that \$12.1 million in funds were raised at the school level in 1983/84. The average teacher put about 15.5 hours per school year into private funding activities. Calculations, based on provincial teacher figures, revealed that the amount of time spent by teachers in private funding activities was equivalent to \$14.8 million, excluding the thousands of hours that administrators, secretaries, parents, and students devoted to private funding activities at school. The researcher concluded that private funding at the school level was not cost-beneficial (pp. 199-170).

One consistent finding among researchers on the views of school administrators in connection with fee practices was the mixed reactions many of them showed. Foutch (1975) found that most principals favoured the elimination of compulsory fees (p. 88). The majority of business administrators were personally opposed to charging fees but professionally it was seen as a means of survival for particular programs (Stabler, 1982, p. 118). A majority of both principals and superintendents disapproved of user fees or service charges in education (Salloum, 1985, p. 195).

On grounds of pragmatism, fee charging was supported in several ways although school administrators were mindful of associated negative aspects. Business administrators thought that it was important that discretion to charge fees by local boards remained as they had very little decision making powers left up to them (Stabler, 1975). Both principals and superintendents thought that private funding, via fees and other ways, helped to financially supplement

educational programs at both the school and district level (Stabler, 1975). In Salloum's (1985) study, principals, but not superintendents, viewed private financing as producing benefits of closer school or district community relations and educational value. On the negative side, a disadvantage of private funding at the school level, according to principals, was that it was time consuming for school personnel (p. 194). Principals also suggested that private funding at the school district level could reduce government's responsibility towards education (Salloum, 1985, p. 195). Forty percent of the principals in Foutch's (1975) study predicted that increases to existing fees or the introduction of new fees would occur in the next school year.

Generally, principals thought that student participation in curricular and extracurricular programs were unaffected by student fees (Bulthaus, 1983; Foutch, 1975). In practice, non-indigent students who did not comply with school fees were not denied participation (Foutch, 1975, p. 85). The same held for indigent students (Bulthaus, 1985). Where there were opposite views on this question, principals thought more expensive courses, prom night, club trips, and transportation costs posed some problems for student participation. Nearly all principals thought reasons other than fees caused students to drop out of school but they admitted it was difficult to always identify needy students (Bulthaus, 1983, pp. 88-90).

The principles of benefit and ability-to-pay in relation to student fees do not feature prominently in the opinions of school administrators. Pragmatism is expressed in terms of district or school autonomy and financial need. However, unless carefully streamlined, benefits derived from student fees could be outweighed by the costs of administrative and teacher time devoted to fee administration. In practice, the benefit rule appears not to be rigidly applied in schools and inability-to-pay was often offset by administrative instruments such as fee waivers and exemptions. However, neediness may not always be visible and may be minimized by school administrators particularly in extracurricular areas.

### Summary of Studies on School Fees

In summary, the review of empirical findings on school fees provides insight into how fee policies and structures may be applied. The legal view of fees focused on three major issues: definition of free education, the category of school programs or activities for which fee may be permitted, and equal education. Court interpretations of legal mandates for free education have determined that public school authorities can legitimately charge students for some things. Court interpretations classify school programs as either part of the regular academic program necessary for students to meet graduation requirements or as part of the extracurricular program. Court approaches may facilitate application of either a narrow range or a relatively wide range of fees. An overriding concern in the legal debate is the issue of equity. Thus, even when fees are permissible fee waivers and other administrative procedures to ensure equal access for indigent students are required.

Important factors in the financial view are types of fees, magnitude of costs, school and school district characteristics, and fee administration. Three types of fees have been consistently reported in the studies: curricular, extracurricular and incidental. The magnitude of fees vary according to the category of fees. On average, incidental fee amounts were reported to be the highest, followed by extracurricular and curricular fees. A strong positive relationship existed between grade level and magnitude of all fees: senior students experienced higher costs than junior students. The same pattern held for higher levels of participation and magnitude of fees. Higher and more fee charges have been associated with larger and wealthier schools. District size, per se, was not reported to affect fees although it was thought to affect availability of student transportation. Generally, school administrators held pragmatic attitudes to fee

implementation. They regarded them as a source of revenue to maintain or improve educational operations in the reality of inadequate funds. Principals tended to treat student fees as unproblematic, except in certain given areas (prom night, transportation, and club trips). Generally, the major issue with fees in the financial studies was magnitude of costs among items. Relatively high costs were incurred by some students depending on their programs and participation level. Also, high wealth and larger districts tended to charge more and higher fees than low wealth districts. It was concluded that school fees are proportional in assessment but regressive in their impact.

Questions around the administration of fees tended to be glossed over as not of major concern in the financial approach. Student fees were paid into the general fund of the district, and in some cases allocated to a specific area like transportation. School level employees (an accounts clerk or student store manager) most often collected the fees (Stabler, 1982, p. 117). However, one study (Salloum, 1985) concluded that private financing requiring substantial teacher time resulted in economic inefficiencies. Schools sometimes charged fees which were not expressly listed as required by the state code. Such practices were suggested to be questionable and probably illegal (Bulthaus, 1983). Schools and districts differed in the kinds and amounts of fees charged for programs and activities leading researchers to conclude that lack of a uniform policy provided little restraint in assessment practices.

### Conceptual Framework and Research Questions

In this section, the conceptual framework and research questions are presented. The framework is formulated from issues within public policy debates on education, privatization trends, divisions of public and private education, principles of taxation, and research on school

fee policies and practices (Figures 1). Linked together, these strands of thought provide a useful heuristic for exploring school fees and their effects.

The framework is conceived in a cause-effect paradigm suggesting that some elements are logically prior to others. The input-output model suggests that the political and economic state of affairs and the outcomes of policy debates shape the policies and laws governing education. In turn, the operation of educational policies and laws feed back to influence the values that govern education. Those two components, combined or separately, impact on the administrative and socio-educational effects of fees. The component labelled external variables affecting school fees, comprises school and district characteristics that shape the administrative and socio-educational effects of fees.

The phenomenon of fees in public schools is largely taken for granted by educational practitioners and researchers. In this study, school fees are conceptualized as taxes because their characteristics closely resemble those of taxes. Concepts from a review of taxation principles such as benefit, ability to pay, efficiency, feasibility, yield and elasticity, compliance, and burden dominate the conceptual framework. At the same time, political and economic dimensions such as government's role in education, privatization, and equity are included in the framework as an attempt to contextualized the issue of school fees. Discussion of problems from the literature on private and public configurations in education, school fees case law, and financial studies on school fees yielded ideas such as public and private benefits in education, historical and plain meaning approaches to free education, and district and school characteristics that are factors in school fees. Taken together, the conceptual framework represents the groundwork performed to arrive at generalizations and sensitizing ideas to guide the investigation

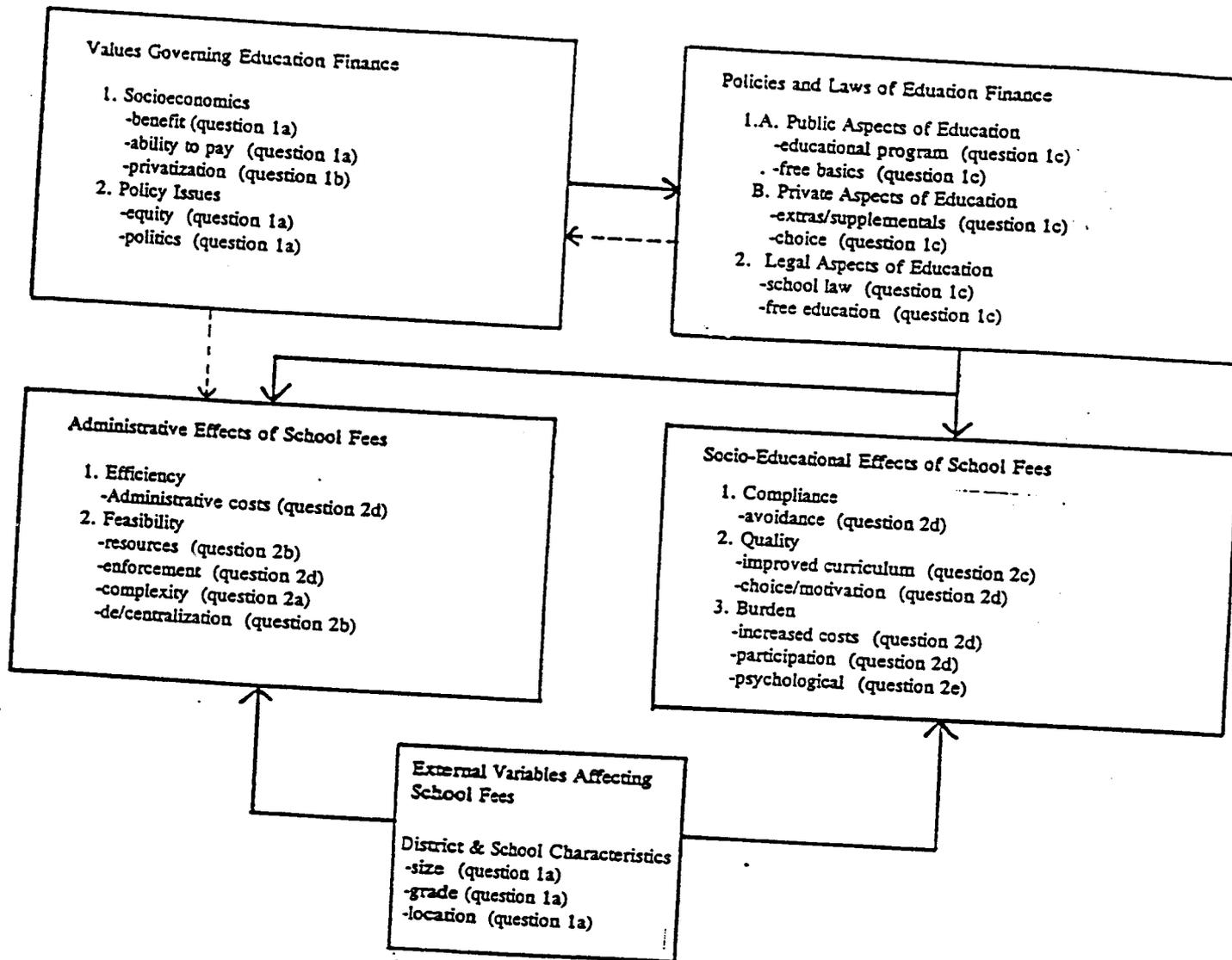


Figure 2: Sources of the research questions in the framework.  
 Question 1: Why do fees exist in public schools?  
 Question 2: How does the application of a fee levy in education affect the provision of educational services?

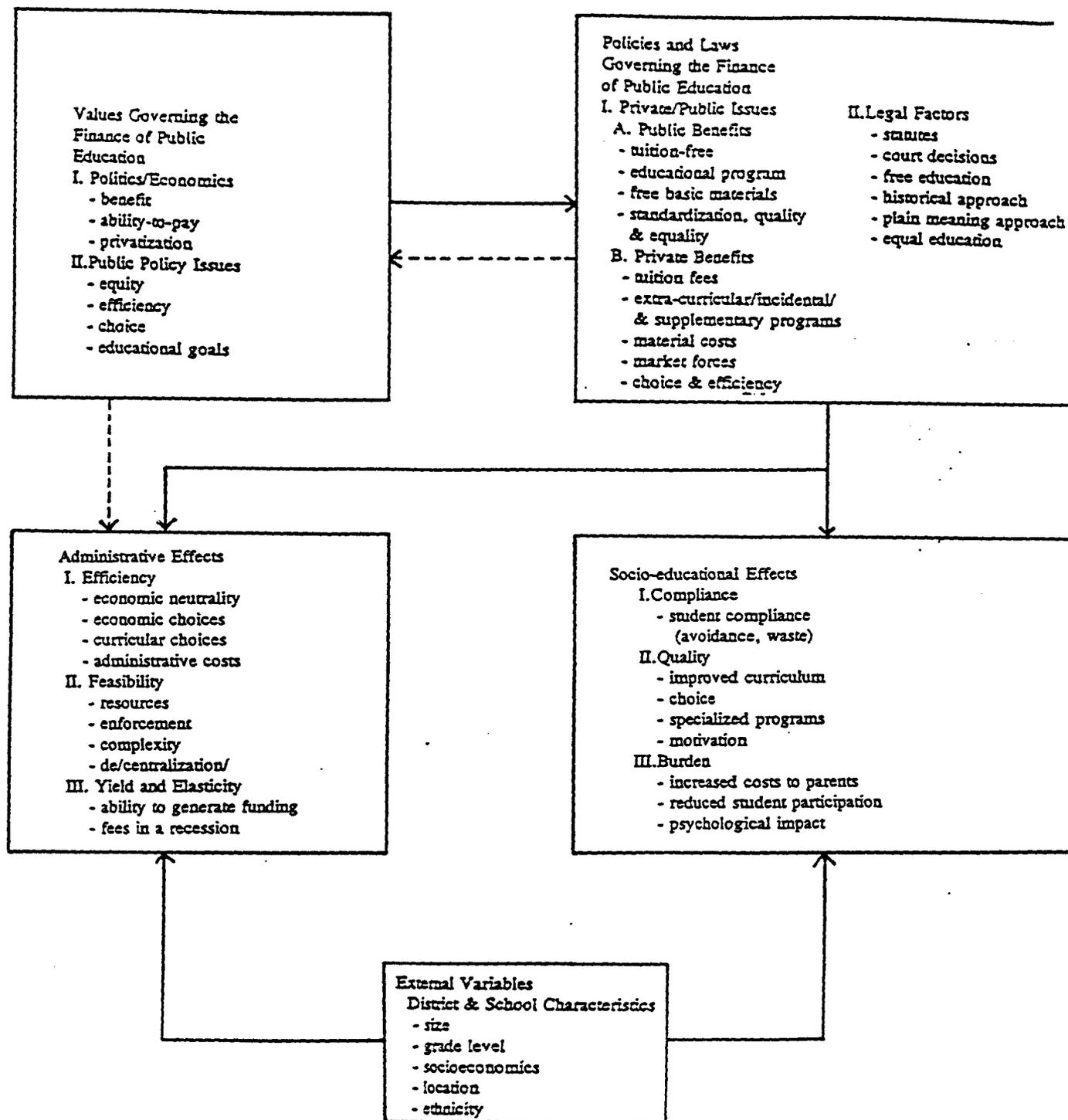


Figure 1: Detailed description of the components and their relationships in the conceptual framework.

of school fees. Subsequent to the examination of relevant literature two separate but interrelated research questions are posed.

Research question one pertains to the exogenous variables in the study. Those variables appear in the three categories: values governing education finance, policies and laws of education finance, and external variables affecting school fees. Research question one and the sub-questions are linked to the conceptual model as shown (Figure 2). Questions were not derived from all the ideas included in the conceptual framework (Figure 1). Therefore the excluded ideas served as background information.

Question 1. Why do fees exist in public schools?

1.a. What factors determine school fees?

1.b. What are the trends in school fees?

1.c. What are the current fee policies/practices?

Research question two pertains to the endogenous variables of the study. Those variables are presented in the two components: administrative effects of school fees and socio-educational effects of fees. Research question two and the sub-questions are connected to the framework as shown (Figure 2). Similar to the first research question, not all of the concepts in the relevant components gave rise to research questions.

Question 2. How do public school fees affect the provision of educational services?

2.a. What measures exist to address inability-to-pay?

2.b. How are levies collected and used?

2.c. How are the quality and delivery of educational services affected by school fees?

2.d. What are the benefits and disadvantages of school levies?

2.e. What are the social/psychological effects of fees?

This chapter presented a review of selected literature on the principles of taxation, empirical research on legal and financial aspects of school fees, and issues in the debate on public and private sector education. From this review, a model of the relationship between the policies and laws governing the finance of public education and the administrative and socio-educational effects of school fees was formulated to provide a comprehensive framework on which to base analyses of why, how and with what consequences school fees are applied in public education. In the next Chapter a description of the data sources, interview schedules, methods of data collection, details of the district and school sample selection, and data analysis procedures is provided. Results for school district administrators, principals and teachers are presented and conclusions are drawn.

## Chapter 3

### RESEARCH DESIGN

The purpose of this chapter is to describe the research design and procedures used to address the research questions. Included in the chapter is a description of the sources of data, details of the samples, interview schedules and methods of data collection and analysis. Direction for the development of the data collection and analysis of procedures was provided by Lofland and Lofland (1984), Spradley (1979), Strauss (1987), and Hammersley and Atkinson (1983) and Miles and Huberman (1984).

The research design emphasized the positivistic tradition while incorporating important parts of qualitative method. In preparation for the data gathering phases, groundwork was performed to arrive at some a priori general conceptualizations and sensitizing ideas in order to guide the way. The conceptual framework was stated in positive terms. Quantitative methods were utilized for reporting fee figures and proportions of interviewees falling within specific categories in order to reflect the discrete reality associated with school fees and educators' reports about them. And an attempt was made to generalize the findings across relevant contexts. The research methodology also incorporated important aspects of qualitative research identified and discussed in Lincoln and Guba (1985) and Guba and Lincoln (1981). Principally, qualitative data derived from interviews constituted the bulk of the data for the study because they were considered to be adaptable to and sensitive in dealing with multiple realities. Purposive as opposed to random sampling was favored because it was thought this strategy allowed a full array of multiple realities to be uncovered and because purposive sampling could be pursued in ways that maximized the researcher's ability to explain the findings and take

adequate account of local conditions. An indepth thematic analysis of school fees in Chapter 5 is an example of how the data were allowed to speak in the dissertation.

Essential research steps and operations appearing in Glaser and Strauss (1967), Strauss (1987), Miles and Huberman (1984), and Lofland and Lofland (1984), informed the procedures for qualitative analysis. Basic operations examined as the study progressed involved the following elements: development of "the concept-indicator model" (which gives a framework or sensitizing concepts to direct the data gathering; data collection; coding, which includes raising questions and giving provisional answers (hypotheses) about categories and about their relations as well as assisting data reduction; memo writing; and integration of concepts. These basic operations are discussed in some detail in Strauss (1987).

### The Research Context

Historically, the organization of a system of public education and delivery of educational services in British Columbia have been largely dictated by the province's unique geography and topography. British Columbia occupies almost ten per cent of Canada's land surface. Problems of size and distance have been exaggerated by other factors such as the province's rugged physical landscape: the high mountains, steep valleys, dense forests and strong rivers. For various reasons, the rich natural resources of the land, and the historical dependence of the British Columbia economy on such natural resources, settlement has often been diffuse and isolated. Communities have developed along small coastal inlets, close to fishing grounds, in isolated valleys where fir and cedar stand, in semi-arid rangeland where ranching became

established, and in the harsh regions of the North where geological deposits are rich (British Columbia Royal Commission on Education, 1988).

The study was conducted in public secondary schools of British Columbia. This context was considered appropriate for the following reasons. First, in Canada, education is a provincial matter with certain guarantees concerning the education of Protestant or Catholic minorities being provided by the Constitution Act of 1867, and subsequent Acts providing provincial status for Manitoba, Saskatchewan and Alberta. At the local level, school boards, created by provincial governments, are semi-autonomous bodies (Lawton, 1987, p. 9; Bezeau, 1989). It is therefore possible to study aspects of the educational system in this jurisdiction at three levels, provincial, district and local school.

Second, as occurs in most other Provinces/States throughout North America, British Columbia has had a long-standing practice of levying some direct charges on students to pay for or to provide given educational services, programs, and materials (Fowler, 1989; Salloum, 1985). Existing variations among districts and schools on the basis of wealth, size, ethnic composition and geographic location hold promise for interesting comparisons to be made within and across districts. Many of these variables were identified and reviewed in the literature review in Chapter 2. The total student enrollment in the schools of British Columbia was 551,709 for 1991. Of this number, 213,434 students were in grades 8 to 12 (Ministry of Education, 1991).

At the same time, the issue of school fees continues to be of some concern in the development of educational finance and educational policy in British Columbia. This concern is underlined as education budgets are reduced in the face of economic recession and taxpayer resistance (Jacobson and Kuehn, 1986). Convenience and access to school districts and schools within British Columbia also influenced the choice of the research sites.

The need to ensure free public education and equality of educational opportunity echoes throughout the government sponsored Sullivan Report (1988) and policy statements issued by the government of the day after the Report was made public. One government-issued statement reads: "The Government is committed to ensuring that parents in every region of the province have access to quality public schooling for their children" (Province of British Columbia, 1989, p. 4). Also, among the attributes identified for the public school system of the province are "accessibility," meaning a variety of programs available in the province to meet the full range of student needs; and "equity", meaning fair allocation of resources (Province of British Columbia 1989, pp. 5-6). The basic question of how policy concerns for free public education, equal access, and delivery of a broad, adequate educational program are managed in the light of budget limitations needs to be addressed. Selection of data and use of sampling procedures were done to address that broad question and, more specifically, the research questions. The data sources and sampling techniques are described below.

### District Sample Selection

Two sources of data were used in the study. The major source was interviews. They were conducted with a sample of district-level and school-level administrators and teachers who were familiar with school fee policies and practices in the British Columbia education system. The choice of subjects to be included in the interview process was made based on three criteria: a) informants had to be willing to participate in the study, b) they had to be knowledgeable about policy and/or practice in the area being studied, and c) they had to include administrators and

teachers from at least one urban and one rural school and district. A secondary and supporting source of data was school and district documents and records pertaining to school fees.

All seventy five school districts, all public secondary schools with senior grades, and the administrators, and teachers within the districts and schools, constituted the population for this study. Characteristics used to select districts emerged from some of the studies on the financial aspects of school fees. Researchers have demonstrated that categories such as school district and/or school size (Foutch, 1975; Gragg, 1975; Stabler, 1982; and Bulthaus, 1983); school district and/or school wealth (Stabler, 1982; Bulthaus, 1983); school district and/or school geographic location (Foutch, 1975; Gragg, 1975; Stabler, 1982, Bulthaus, 1983); and school district and/or school ethnic composition (Ogbu, 1988) are potentially important factors for analysis of school fee policies and practices.

A school district purposive or judgement sampling technique based on consideration of a number of variables was used to select the districts (Bogdan and Biklen, 1982). The criteria are listed below.

1. School district size (actual school enrollment as of September 1990).
2. School district wealth (assessment value per pupil of district property for September 1989).
3. School district regional location (according to the British Columbia Teachers' Federation regional school district map, and the Ministry of Advanced Education and Training, 1986).
4. School district ethnic composition.

For the first criterion, school district size, government figures for enrollment were used to help select districts. Seven district types based on student enrollment and the number of school districts within each type appear in Appendix D, Table I. District size was included because it was thought to influence the type and magnitude of school fees students paid (Bulthaus, 1983). For the second criterion, government figures on property assessment per pupil

for all 75 school districts in British Columbia were used to assist the sampling of districts. The average assessment per pupil was valued at \$286,761 for 1989 (British Columbia Teachers' Federation, 1989). To determine high, medium, and low status for the wealth category, school districts were simply ranked from highest to lowest in assessed valuation on property per pupil and separated into three equal sets. The third criterion, regional location, was met by dividing up all 75 school districts into regions. In order to represent different regions, districts that represented different geographic regions in the province were selected. Consideration was also given to the simpler classification scheme of geographic regions (Metropolitan, Urban/Rural, and Remote regions) offered by the Ministry of Advanced Education and Job Training (1986). Inclusion of the regional location variable was based on the reasoning that any observed differences among school fees could be related to the rural, urban or remote characteristics of the districts. The final criterion for district sample selection was ethnic composition of districts. Much of the literature on education investigates and supports the existence of unequal distribution of educational services and educational outcomes based on race and/or ethnicity (Ogbu, 1988; Roth, 1983). One of the purposes of this study was to test whether or not district fee policy was, in fact, a function of ethnicity and also whether or not a link existed between ethnic composition, school programs and school fee structures. Ethnic composition of British Columbia for two years, 1961 and 1986, are given in Appendix D, Table II. Ethnic background by school district, as of September 1990, for the seven most ethnically diverse districts in the province are shown in Appendix D, Table III.

In order to achieve a fairly high level of contrast among districts, those with medium size and medium wealth were dropped from the study. The intermediate sample of districts at this stage was seventeen (Table 2). Twelve districts were tentatively selected for inclusion in the study (Table 3) based on recommendations of members of the dissertation committee who were

knowledgeable about the potential availability of district staff for interviews. For instance, it was decided to remove District 35 (Langley) from the sample because that district's education staff were already involved in on-going research. At the same time, it was deemed useful to include New Westminster because the majority of constituents there favoured the socialist party of the province.

Table 2. Characteristics of Districts Within the Study Region

District	Enrollment	Location	Wealth	Ethnic mix
Keremeos	small	rural	low	low
Armstrong	small	rural	low	low
Lillooet	small	rural	high	low
South Cariboo	small	rural	high	low
Merritt	small	rural	high	low
Hope	small	rural	high	low
Langley	large	urban	low	low
Surrey	large	urban	high	high
Richmond	large	urban	high	high
Vancouver	large	urban	high	high
Burnaby	large	urban	high	high
Coquitlam	large	urban	high	low
Central Coast	small	rural	low	low
Greater Victoria	large	urban	high	low
Gulf Islands	small	rural	high	low
Lake Cowichan	small	rural	high	low
Agassiz-Harrison	small	rural	high	low

Sources: Ministry of Education (1990) Information Management Report  
British Columbia Teachers' Federation (1989)

Table 3. Characteristics of Provisionally Selected Districts.

District	Size	Location	Wealth	Ethnic mix
Keremeos	small	rural	low	low
Armstrong	small	rural	low	low
Lillooet	small	rural	high	low
Merritt	small	rural	high	low
Hope	small	rural	high	low
Surrey	large	suburban	high	high
Richmond	large	suburban	high	high
Vancouver	large	urban	high	high
New Westminster	medium	suburban	high	high
Coquitlam	large	suburban	high	low
Gr. Victoria	large	urban	high	low
Gulf Islands	small	rural	high	low

Sources: Ministry of Education (1990) Information Management Report  
British Columbia Teachers' Federation (1989)

#### District Personnel Selection

After provisional selection of 12 school districts, introduction and permission to conduct research was requested in writing from nine of the superintendents of schools. The superintendent of schools or his designate was requested to participate in the study. The offices of the following superintendents were contacted: Keremeos, Armstrong, Merritt, Richmond, Vancouver, New Westminster, Coquitlam, Greater Victoria, and the Gulf Islands. Where superintendents did not respond after one week, follow-up telephone calls were made to their offices. On those occasions, appointments were established for conducting the interviews. After

several attempts to schedule appointments with two superintendents without success it was decided to eliminate them from the study.

Only one school board required formalized approval of the research project before any interviews could be conducted. That was for the Coquitlam school district. At the end of each interview superintendents were asked to name at least one district and school official who would serve as valuable sources of information. Very few superintendents were able to supply fee schedules or school fee policies. As the interviewing process continued, it was critical from the point of view of being able successfully to conduct an interview to confirm the date and time one or two days prior to the event. However, this was not always easy to accomplish given the amount and intensity of travelling scheduled within a three month period (from October to December 1991). Consequently, in two cases repeated visits to offices of superintendents had to be made. It was also frustrating to have superintendents agree to schedule a full hour and then have them indicate at the beginning that time pressures only allowed them half an hour for the interview. This happened in two cases. The interviewing strategies used on those occasions were to pose the most important questions at the beginning of the interview.

After all the superintendent and some of the principal interviews were completed, it was decided to drop another two districts (New Westminster and Coquitlam) from the next data collection phase. Based on the criteria employed for district selection, the characteristics of the two eliminated districts were adequately represented by the remaining five districts. Further in depth study of the five retained districts was pursued chiefly through teacher interviews. Economic and geographic features of each of the five districts are described below in the following section.

### Two Small Rural Districts

One school district is located in the Merritt area and comprises the town of Merritt and the communities of Colletville, Dodding Subdivision, and Lower Nicola. By highway, Merritt is 364 km east of Vancouver, 89 km north of Princeton and 98 km southeast of Kamloops. Completion of the Coquihalla highway has significantly reduced the distance to Vancouver. In 1981, the population of Merritt was 9,766. The forest industries are of primary importance in the local economy followed by mining. Agriculture is of less significance in terms of employment but it provides a stabilizing influence. Short term disruptions occurred when the Craigmont Mine (ore) closed permanently in 1982. The longer term outlook is for some growth based on further development of Highland Valley mineral resources, construction of the Coquihalla highway and further improvements to the southern interior highway network (Ministry of Economic Development 1986, p. 142).

Merritt school district was originally selected because it is one of the few districts outside of the Greater Vancouver region which has a diverse population living within the district's boundaries. Total student enrollment for 1991/92 was 2,020 and the number of students enrolled in secondary schools (grades 8-12) totalled 739 (Ministry of Education, 1991). Approximately 20% of the public school population of about 2,000 are of East Indian origin, with about 5% of district residents having Punjabi as their native tongue. The provincial average for persons indicating Punjabi as their native tongue is 3%. The Native Indian population in Merritt is about the same as that of the East Indian population but most of the Native Indian students are educated in the local band schools. Some may enter the secondary school after completing elementary and junior high school. Such ethnic diversity makes the inclusion of Merritt valuable for closer study since one of the purposes of the study is to determine whether ethnicity is

related to fees and access to programs in public secondary schools. Merritt's rural location outside the Greater Vancouver region and the Lower Mainland offers another useful comparison point for the other four districts.

The Southern Gulf Islands area includes the communities of Saltspring Island, Galiano Island, Ganges, Mayne Island, North Pender Island, Saturna Island, and South Pender Island. In 1981 the population of the area was 8,023 persons. A small number of fishermen are based in the area and there is also some farming and logging activity. However, the local economy is largely supported by tourism, retired residents, and self-employed artists and craftsmen. The area has the highest proportion of population aged 65 and over in the Province. Improved ferry service between the Gulf Islands, the Lower Mainland and Vancouver island has been a major factor in recent growth. A small number of workers commute daily to larger centers but the emphasis to date has been on residential subdivision for summer homes and permanent residences for retired persons (Ministry of Economic Development, 1986, p. 258).

The Gulf Islands school district may be described as the district having the least formalized communication structures and processes. The most noticeable characteristic is its high wealth combined with rural status. Total student enrollment stood at 1,665 for the 1991/92 school year. Secondary school enrollment for the same year was 552 (Ministry of Education, 1991). The high school, situated on Salt Spring Island has grown from a student enrollment of 200 to 500 within the last decade. It still remains a focal point for a community of diverse socioeconomic characteristics but of homogeneous ethnicity.

### Two Large Metropolitan Districts

One large urban school district, Greater Victoria, comprises the City of Victoria, the municipalities of Esquimalt, Oak Bay, Central Saanich, North Saanich and Saanich, and the Town of Sidney. In 1981 the population of the Victoria area was 233,481 persons. Service industries are the main sources of income and the largest payrolls are those of the Federal and Provincial governments. The second most important source of employment is trade, which is supported in part by the large number of retired residents and by the highly important tourist industry. Manufacturing is also an important component of the economy although a number of manufacturing plants have closed over the last 2 decades because of transportation to and from the Island. Educational and research industries do not face this problem and are of increasing importance. Agriculture, commercial fishing, logging and transport-related operations contribute to the economy (Ministry of Economic Development, 1986, p. 261).

Greater Victoria School District was originally selected because it was a large, wealthy, urban district like Vancouver, but unlike Vancouver had lower ethnic diversity. The district had a total student enrollment of 23,707 and a secondary school enrollment of 9,248 in the 1991/92 school year (Ministry of Education, 1991). Different types of schools are situated within its boundaries and are described as "inner city", urban, and suburban schools. Inner city schools draw students from a wide cross section in terms of ethnicity, and socioeconomic status, while suburban schools receive students from more socially and economically homogeneous groups.

The Vancouver area comprises the City of Vancouver, the University Endowment Lands, and adjacent Indian Reserves. In 1981 the population of the Vancouver Area was 419,223 persons. Vancouver City had a population of 414,281 in 1981 and the Greater Vancouver Regional District contained 1,169,831 people in the same year or 43 per cent of the total

population of British Columbia. The Vancouver Area is the economic heart of the Province and the principal manufacturing, trade, and service center (Ministry of Economic Development, 1986, p. 184).

Vancouver has a unique place among school districts in British Columbia as the largest, most ethnically diverse district in the province with a total student enrollment of 53,443 and a secondary school enrollment of 21,369 (Ministry of Education, 1991). The size and complexity of the Vancouver school district guarantee students a full range of program offerings in most secondary schools. Educational programs are often driven by the special needs of students residing in a large urban center. In smaller, rural districts like Merritt and the Gulf Islands, for example, comparable course offerings are just not available. Special programs such as summer school, correspondence education, international education, and alternative school programs may be studied more effectively in a large urban setting.

#### One Large Suburban District

The Richmond area comprises the District of Richmond with a total population of 96,154 persons in 1981. Richmond is a large residential suburb, with many of its inhabitants employed in many parts of metropolitan Vancouver. Its function as a "bedroom municipality" is responsible for most of the area's growth over the past two decades or more and it is expected to continue to be an important factor in future development. However, the economy is becoming increasingly diversified with the development of manufacturing, trade, and service industries in recent years. Agriculture has remained an important economic activity. A large number of fishermen are based here and the community of Steveston contains a number of

canneries and related industries. Service industries provide the largest number of jobs and Vancouver International Airport is the single largest source of employment (Ministry of Economic Development, 1986, p. 196).

As a large suburban district with relatively high ethnic diversity, Richmond serves as a comparison point for both small rural and large urban districts. Student enrollment for the 1991/92 school year was set at 20,848. Secondary students totalled 8,424 for the same year (Ministry of Education, 1991). The relative uniformity in wealth of the district was an important point in selecting it for the second phase of data gathering. While urban districts are wealthy, inner city schools cater to economically, socially and educationally disadvantaged groups. This phenomenon is absent from equally wealthy suburban school districts.

### School Selection Sample

A multisite approach was employed in this part of the study. A purposive or judgement sampling strategy was used to select 18 schools from 29 secondary and senior secondary schools in 7 districts. Secondary schools deemed appropriate for the interviews were identified by both superintendents and the researcher (Table 4). The aim of the selection strategy was to ensure that schools of different size, wealth, location, and ethnic composition were included in the study. After tentative selection of the schools, permission to conduct an interview was requested by a letter mailed to each school principal (Appendix E).

### Characteristics of Selected Schools

Schools were grouped according to the size of their student populations. Schools having a student enrollment of 600 and below were considered to be small. Those with enrollments between 601 and 1200 were medium sized schools. Schools with an enrollment of 1201 and over were large schools. The sample included two small schools, nine of medium size schools, and seven large schools. Based on reputation schools were categorized as being rich, poor or of medium/mixed economic status. Superintendents and principals made judgements about the wealth of schools based on their knowledge of the school district and the income levels of the parents whose children attended their schools. Seven schools were judged to be rich, three poor, and eight of medium/mixed economic status. Schools located within large urban centers like Vancouver and Greater Victoria were judged to be urban schools. Those located outside urban municipalities but within easy access of major urbanized centers were categorized as suburban. Schools separated from major urban centers by relatively long distances over land, or water were categorized as rural schools. Based on these criteria, eight schools were urban schools, eight were suburban, and two were rural. Schools were judged to be either high or low in ethnic composition based on the reports of superintendents and principals. Thirteen of the schools had high ethnic diversity and five had low ethnic diversity.

### School Personnel Selection

A purposive sampling technique was used to select school personnel, guided by the recommendations of school district personnel and preliminary examination of school documents

and records. Initial contact by letter was made to the principals of the secondary schools in the seven districts: Merritt, Richmond, Vancouver, New Westminster, Coquitlam, Greater Victoria and the Gulf Islands (Appendix E). Many of the principals who were contacted, particularly in Vancouver, indicated that time pressures prevented them from participating in the study. When a principal indicated inability to participate in the study due to time constraints another principal from a similar type of school was selected where possible. Principal participants were therefore included in this study based on their willingness to be interviewed, and their key role in the implementation of a school fee policy.

Each of the principals contacted by letter were contacted one week later by telephone at which time an appointment was set up for the interview. All of the principals or their designates were interviewed in their offices and permission was requested to tape the interview. Once the interview was completed, they were then asked to recommend two teachers for interviews. The Vancouver School District was the only one requiring formal approval for conducting research in its schools at this stage. Approval was granted by the Student Assessment and Research Branch.

Teachers were selected for interview based on the recommendations of principals or other teachers. Their familiarity with the routine operations of their schools and fee practices and programs was the chief criterion for inclusion. Also, teacher accounts served to validate reports by district and school administrators and to pinpoint with greater accuracy the effects of fees on the quality of educational programs and student access.

It became clear from preliminary examination of interview data that school fees are commonly attached to some courses and not to others. Program areas with fees attached were: electives (fine arts, technical-vocational courses, business education, home economics, physical

Table 4. Schools Selected For Principal/Vice-Principal Interviews

School	Size	Wealth	Location	Ethnic mix
<u>Merritt</u>				
School A	600(S)	medium	rural	high
<u>Richmond</u>				
School A	1048(M)	rich	suburban	high
School B	1154(M)	rich	suburban	high
School C	1248(L)	rich	suburban	high
<u>Vancouver</u>				
School A	994(M)	poor	urban	high
School B	1733(L)	rich	urban	high
School C	1314(L)	medium	urban	high
School D	1341(L)	medium	urban	high
School E	949(M)	rich	urban	high
School F	1230(L)	rich	urban	high
School G	1734(L)	poor	urban	high
<u>New Westminster</u>				
School A	1418(L)	medium	suburban	high
<u>Coquitlam</u>				
School A	1038(M)	medium	suburban	low
<u>Gr. Victoria</u>				
School A	1021(M)	rich	suburban	low
School B	723(M)	mixed	urban	high
School C	784(M)	poor	suburban	low
School D	739(M)	medium	suburban	low
<u>Gulf Islands</u>				
School A	516(S)	mixed	rural	low

For column 2: L = large; M = medium; and S = small

Sources: Superintendents of schools and school principals ; Ministry of Education (1990) Information Management Report.

education and generally courses requiring consumables or special supplies); extracurricular activities; and special programs. Programs where fees were unlikely to be imposed were: mathematics, social studies, English, history, biology and other core subjects forming part of the provincially mandated program. Therefore, as the study progressed, teachers were selectively chosen from electives, extracurricular and special program areas.

There were two basic ways of eliciting teacher participation. In the first instance, a principal named two teachers and indicated that he/she would inform the researcher within a week whether or not they would be available for an interview. Often this approach meant the researcher had to place follow-up telephone calls to principals. In the second case, principals were reluctant to ask teachers to be participants and it was left up to the researcher to contact teachers directly. Departmental heads and teachers in the relevant areas were then identified from district directories and contacted. Many of the teachers initially designated by principals indicated that time pressures prevented them from being available for interviews.

### Interview Procedure

The principal source of data in this study involved interviews with education personnel at the three levels of the education system in British Columbia. The purposes of the interviews were to determine what were the current policies and practices on the levying of school fees and to explore in depth the processes of collection and allocation of student fees at the school level. Three interview schedules were developed and used to elicit responses from school board officials, mainly superintendents; from school administrators; and from teachers (Appendix F).

Questions in the schedules were derived from major themes in the literature on fees in education and helped to structure the interview.

The interview schedules used in the interviews were developed by the researcher and piloted at both the district and school levels. In May 1990, the interview schedules were piloted with both district and school personnel. At the district level, four superintendent-rank personnel were included, one each from Coquitlam, Richmond, Vancouver and New Westminster. All of these superintendents were included in the actual sample. At the school level, two principals, one from Vancouver and the other from West Vancouver school districts were included. One of the principals, from West Vancouver, was not included in the actual sample of school principals.

During the piloting sessions it was discovered that the interview schedules for superintendent-rank personnel could easily run over the time limit of one hour. A decision was made to keep within the time allotment for this level of administrator by starting with general background questions on fee policies and practices and then interjecting more specific questions from the schedule as the interview proceeded. Evaluation of the schedules and procedures indicated that the format of the interview was adequate and could be retained but suggestions were made to shorten or rephrase some questions. It was judged that district officials could provide answers to most of the questions on the schedules but specific fee amounts and the subjects areas in which they were charged were thought to be better answered by school administrators.

The piloting of the school level schedules was successfully completed with two principals. They took on average an hour to complete them. Again it was judged to be a good strategy to pose general questions about fee practices, administration, effects, and factors influencing the fees to principals and interject specific questions as the interviews progressed. This was

necessary as principals tended to respond at some length to each question. No changes were made to the format of the interview schedule but some questions were rephrased and shortened. No pilots were conducted for the teacher interview schedules. Teacher interviews were done for the purposes of validating the data provided by personnel at the higher levels of the school hierarchy as well as for their information about the impact of fees.

Three sets of interviews totaling fifty-four were conducted during two major phases of data collection. District administrators were contacted by letter indicating an interest in conducting research in the district and requesting their participation or the designation of a colleague. Tables 7 and 8 show the number of participants in the two phases of the data collection.

The decision to collect the data in two phases was made for two reasons. First, the first data collection phase occurred from September through December of 1991. The end of this phase coincided with the Christmas holidays and school break. Second, it was deemed appropriate to pause in data collection and to use the time to make some preliminary evaluations that would better inform the direction of the research and thus enhance the final report. This strategy is encouraged by Strauss (1987). Thus, between the two phases, opportunities were taken to continue writing up initial chapters of the research project; to transcribe, read and compare the completed interviews; and to make preparations for the second round of data collection.

The district level interviews were semi-structured, face-to-face interviews, approximately one hour long, with one superintendent-participant from each of ten districts and one ministry official. Four major areas were probed 1) fee policy and practices, that

Table 5. Interviews Completed During the First Phase of Data Collection

District	District Administrators	Principals	Teachers	School Office Staff
Merritt	1	-	1	1
Richmond	1	2	-	-
Vancouver	3	1	-	-
New Westminster	1	1	-	-
Coquitlam	2	2	-	-
Greater Victoria	1	3	-	-
Gulf Islands	1	-	-	-
Total	10	10	1	1

Table 6. Interviews Completed During the Second Phase of Data Collection.

District	Principals	Teachers	School Office Staff
Merritt	1	2	-
Richmond	1	3	-
Vancouver	5	9	1
Greater Victoria	2	5	-
Gulf Islands	1	2	-
Total	10	21	1

is, the programs activities, and materials for which students pay and district policy in responding to inability to pay; 2) effects of school fees, that is, the advantages and disadvantages of school fees; 3) factors influencing the district's fee policy, that is, what factors have helped to shape the current district policy on school fees; and 4) related issues, that is, issues related to "free" public education, supplementing school budgets, and student equity. These operational research questions related to the research questions in Chapter 2 as follows. Research question one (Why do fees exist in public schools?) addressed the operational research questions posed under the headings factors influencing district fee policies, and fee policies and practices. Research question two (How does the application of a fee levy in education affect the provision of educational services?) was addressed by the questions posed under the headings, effects of school fees, and issues related to fees.

Interviewees were allowed some degree of flexibility in how they answered the questions according to advice given by Spradley (1979) and McCracken (1988). All of the superintendent interviews were taped, and typed transcripts were prepared from the tapes. It was judged that because the number of interviews conducted were not too many and the researcher was relatively inexperienced, the procedures of taping and full transcription of interviews were necessary to ensure accuracy of recording (Strauss 1987, p. 266). Only when school personnel wished not to be taped or when they were unavailable for face-to-face interviews was note-taking used. None of the district personnel declined to have his or her interview recorded on tape.

All of the principals in the first phase of data collection were contacted by letter after being recommended by superintendents of schools. Ten interviews were conducted at that time. Principals in the second stage of the collection of data were also contacted by letter. Nine principal participants were interviewed then. The principal interview schedules probed four major areas: 1) fee practices, that is, the programs activities, material, etc., for which students

are paying and the background to the current practices; 2) fee administration and processes, that is, how the fees are established, collected and allocated; 3) effects of school fees, that is, what are the financial, social and other effects of levying fees; and 4) factors influencing the fee policy, that is, what factors helped to shape the school's current policy on fees. The operational research questions related to the research questions in Chapter 2 as follows. Research question one addressed those questions posed under the headings fee practices, and factors influencing fee policy. Research question two was addressed by questions posed under the headings effects of school fees, and fee administration and processes. In the majority of cases, these interviews were taped. One principal indicated he wished not to have his interview taped. Typed transcripts were prepared from the principal interviews.

Due to the structure of timetables, time constraints and teaching responsibilities, most teacher interviews were limited to approximately half an hour. Also, some of the interviews had to be conducted on the telephone as no appropriate time for a face-to-face interview could be quickly arranged. The teacher interview schedules probed three areas: 1) fee practices in the teacher's specific subject area; 2) collection and application processes, that is, how the fees are established, collected and allocated for that particular subject area; and 3) the effects of school fees, that is, what are the effects of fees on programs and student access. These operational research questions were linked to the research questions in Chapter 2. Research question one was related to the operational research questions posed under the heading fee practices. Research question two was linked to the operational research questions listed under the headings collection and application processes, and effects of school fees.

About half of the teacher interviews were taped and notes were made for the other half as fifty per cent of teacher interviews were conducted on the telephone. A third set of typed transcripts were prepared from the tapes. Taped teacher interviews yielded on average ten pages

of typed material while typed materials from notes yielded three or four pages. The major difference between the two types of interviews was that the taped ones yielded more detailed information that helped to support or contradict data provided by school administrators. The lengthier teacher transcripts were also more useful for the thematic discussion in Chapter 6 where the language of the interviewees was directly quoted.

### Data Analysis

Compilation of the interview transcripts for summary and verification by interviewees constituted the first stage of data analysis. The preparation time for each district and principal interview averaged nine hours. School teacher interviews took considerably less time averaging four hours as they were of shorter duration.

Working from the transcribed versions, each interview was read and reread and as the reading continued some words, phrases and segments were marked, "tagged" or coded with given words, abbreviations or numbers in the margins of the text. The given words and numbers used for coding segments of the texts were derived largely from the guiding schedules used during the interviews. Thus, as an example of the coding for the district interviews, answers were keyed to what district administrators said with respect to (a) fee policies and practices, questions 1 through 3; (b) the effects of fees, questions 1 and 2; (c) factors influencing fee policies, questions 1 through 3; and (d) issues related to fee, questions 1 through 4. The coding method here is in line with the structured approach preferred by Miles and Huberman (1984, p. 56). At the same time, a more open ended, unrestricted type of coding was followed

as explicated by Strauss (1987) to produce concepts that seem to fit the data and using topics or themes introduced either by the researcher or the respondents.

The indexed transcripts were then used to reduce each interview to a "face sheet" containing condensed responses from subjects to the three (in the case of teachers) or four (in the case of administrators) broad areas on which questions were posed (Lofland and Lofland, 1984). Care was taken at this stage to retain the key factual information for each question, (dates, fee amounts, policy statements) and to make note of important, succinct or colorful expressions or language which might be used as direct quotations later on in the writing up of the report. Care was also exercised to use the language and intended meaning of the subjects as summary data and to refrain from interpretations of the data.

The first set of completed, transcribed versions of the interviews (consisting mainly of superintendents and a few principals) were mailed to respondents in June 1992 along with a cover letter asking subjects to review them and to forward any desired revisions in the returned interview within a period of two weeks after receipt of the same. The second set of interviews (for principals and some teachers) were mailed in November 1992 with an identically worded cover letter (Appendix G).

From a total of 40 transcripts and letters mailed to interviewees, responses were received from nine. Six responses were received from interviewees in the superintendent-rank group, two were in the principal group and one was a ministry official. Seven returning the transcript by mail with some corrections, and the remaining two interviewees responded via telephone. Corrections to the transcripts were chiefly concerned with typing errors, names of persons and places, and clarifications of statements. More substantive changes indicated, for example, that in the Greater Victoria school district there had been a policy change with respect to offshore students in the international education program. The district was now pursuing a policy of

actively encouraging international students to attend schools in Greater Victoria and tuition fees had doubled from \$5,000 to \$10,000 for the 1992/93 school year. In responding to the interview transcripts, officials were also concerned that they themselves or given schools not be identified in the study.

Subsequent to the data reduction phase, development of the research report progressed to description and comparison of how school educators in the three groups perceived school fees practices and their effects on educational programs and students in British Columbia. Using a set of analytic questions available in Hammersley and Atkinson (1983, pp. 142-43) documents (fee policies; fee schedules; course selection booklets, handbooks or newspapers; budgets and memos) received from school districts and schools were scrutinized and used to support data from the subjects in the study. These documents were collected and accumulated throughout the entire data collection stages. Superintendents and principals were the main sources of school documents but in a few cases teachers and office personnel also provided some materials. School course selection booklets and newspapers were fairly widely available, however, agenda books, fee policies and fee schedules were much less available.

An initial summary of the findings was formulated along the lines of questions posed in the interviews in the hierarchical order of district, school and subject teachers. The aim of the presentation of data and the descriptive part of the data analysis was to represent the views of the respondents and to indicate as clearly and concisely as possible what and how they responded on the major questions posed. This description involved coding and counting the data according to the questions on the interview schedules and other relevant codes that became evident from the raw data.

Using the full length interviews, data were then organized according to themes as a method of allowing the data to speak. A comparative analysis at this stage looked at the

similarities and differences among schools districts, and schools based on the themes educators revealed to be most important as they talked about fees in public education. The analysis provided an account of how implementing school fees at the school level is influenced by administrative processes so as to offset problems of student accessibility. Using Strauss's indicator-concept model the indicators of privatization, equity, efficiency, and ease of administration were identified and used for comparison of indicator to indicator (1987, p. 25; 1967, pp. 101-115).

Emerging themes and issues which conveyed meaning and gave coherence to the data were identified and tagged at various stages of data analysis by grouping specific concepts under more general ones (Miles and Huberman, 1984, p. 223; Strauss, 1987, p. 25). Memo-ing was employed as a device to summarize data, record emergent patterns and issues, and develop explanations of the relationships among concepts and issues. Useful devices for reducing, displaying and integrating concepts were matrices, master charts and diagrams (Miles and Huberman, 1984; Strauss, 1987; Lofland and Lofland, 1984). Matrices in turn formed the bases for many of the tables presented in Chapters 3 and 4.

### Reliability and Validity of the Interview Data

In order to enhance the credibility of the interview data, guidelines for validity and reliability of qualitative data were followed. As a purposive sampling strategy was employed, it cannot be argued that the district or school samples are fully representative of the entire province of British Columbia. This study used quantitative and qualitative data collecting and

data analysis (Hammersley and Atkinson, 1983; Lincoln and Guba, 1980; Guba and Lincoln, 1989).

Credibility or internal validity, that is, "establishing the match between the constructed realities of respondents (or stakeholders) and those realities as represented by the evaluator" (Guba and Lincoln 1989, p. 237) was shown by using the strategy of member checking. The interviews, either in their entirety or summaries of them, were returned to the subjects for verification. Triangulation was another mechanism employed to cross-check the accuracy of given data items. Triangulation supports a finding by "showing that independent measures of it agree with it or, at least, don't contradict it" (Miles and Huberman 1984, p. 234). Findings from an interview with one subject at a given level of the school system hierarchy were triangulated with findings from interview data with another subject at a different level of the system, as well as with data from documentary sources.

Transferability, external validity or generalizability in naturalistic inquiry is established by the major technique of thick description. The researcher must set out all the working hypotheses, and provide an extensive and careful description of the time, place, and culture in which those hypotheses were found to be important so that transferability judgements may be made by others who wish to apply the study to their own situations (Guba and Lincoln 1989, pp. 241-242). In this study, descriptions of the context, sampling procedures, interviewing techniques, and data analysis are presented in order to illustrate how the conclusions were developed.

Dependability or reliability is concerned with the stability of the data over time, that is, outside reviewers should be able "to explore the process of the research, judge the decisions that were made, and understand what salient factors in the context led the evaluator to the decisions and interpretations made" (Guba and Lincoln 1989, p. 242). Therefore, this study

described the processes of data collection and analysis in Chapter 3, and the researcher's taped interviews, transcripts, summaries, master charts, and notes are all available for inspection.

Confirmability or objectivity is related to the dependability criterion according to Guba and Lincoln (1989) and means that data can be tracked to their sources. The raw data and the processes used to condense them should be available for inspection and confirmed by outside reviewers of the study (p. 243). Confirmability can be achieved in this study by examination of face sheets used as tools to reduce the raw data to summaries for easier access to reviewers. The topics and subtopics noted on the face sheets are linked to those included on the interview schedules and in turn to the research questions investigated in the study.

### Summary

In this chapter, the research design and procedures used to investigate the research questions were described. The chapter began with a discussion of qualitative research and a description of the research context. Next, selection of school districts, secondary schools, district officials and school officials were outlined. Interview procedures and qualitative data analysis techniques were also discussed. The chapter closed with a discussion of the reliability and validity of the study.

## Chapter 4

### RESULTS OF DISTRICT AND SCHOOL PERSONNEL INTERVIEWS

This chapter presents the results of interviews with school district administrators, principals and teachers in order to answer the two research questions of this study. Those questions are: 1) Why do fees exist in public schools? and 2) How do public school fees affect the provision of educational services? The data base for the chapter comprised interviews with educators and documents made available by those officials. See Appendix I for a list of all relevant district and school documents. The chapter is organized into three major sections in hierarchical order of district, principal and teacher results.

#### District Administrators Interview Results

The district-level interviews were conducted with officials to explore their perceptions on four topics: the current district fee policies and practices, the factors that influenced those policies, the effects of school fees, and specific controversial fee-related issues. Superintendents or their designates were interviewed from Merritt, Richmond, Vancouver, New Westminster, Coquitlam, Greater Victoria, and the Gulf Islands. Results are arranged by district for the four major topics covered in the district interview schedule. A description of the districts selected for the study, interview procedure, and preparation of data from the interviews and documents was outlined in Chapter 3.

### Current Fee Policies and Practices

There were a variety of programs and activities for which students were assessed fees in the sampled school districts of British Columbia (Table 7). The programs and activities fees may be classified under four headings: curricular fees; extracurricular fees; incidental fees; and supplementary and special program fees. All of the fee types, except for supplementary program fees, were partly derived from the literature and were defined in Chapter 2.

Curricular fees were found to exist in the senior grades of the high schools of British Columbia. The senior high school curriculum in British Columbia is structured by a division of core or required subjects and course electives which together provide students with sufficient credits to meet general graduation requirements. Among electives, students may take locally developed programs approved by the Board of School Trustees. Fees were more often attached to course electives than to required subjects. However, students were required to sometimes supply materials, in lieu of fees, for some core program such as mathematics and physics (calculators). Course elective fees often took the form of a flat, basic fee which students were required to pay on registration day or a "hidden fee" in the form of costs for materials that extended beyond the basic materials supplied by the school. Required class field trips, for which students paid, in both core and elective programs were also regular features of secondary education.

All of the superintendents of schools reported that no fees were required in the core program for high school students but that fee charges were made in course electives. The reason why superintendents did not report fees for supplies in mandatory courses was partly because student costs for supplies are not regarded as fees by them. In the case of required field trips,

Table 7. Types of Fees assessed by District (1991-92)

District	Curricular	Extracurricular	Incidental
Merritt	basic fees plus material costs in art, foods, metalwork and woodwork mechanics, business education, musical instruments	clubs, graduation, exchanges, sports (equipment, tournaments), school plays, dances, concerts field trips	graduation, text books, student yearbook, lock athletics
Richmond	material costs for woodwork, physical education, textiles and foods, musical instrument first aid manual in physical education	clubs, trips, exchanges, sports (equipment, tournaments), concerts, plays, dances	graduation, yearbooks, student council, locks
Vancouver	material costs in woodwork, metalwork electronics foods and textiles, workbooks musical instruments, career preparation	clubs, trips, exchanges, graduation sports(equipment, tournaments) plays, dances, concerts, band trips	graduation, athletics student council yearbook agenda book
New Westminster	basic fees in arts, business education, foods and textiles, woodwork and auto-mechanics; shop coveralls, laboratory books, band instruments and uniforms, physical education	clubs, band trip, field trips, exchanges graduation, sports (equipment, tournament) school plays, dances, concerts	graduation, student activity, yearbook

cont'd

Table 7. Cont'd

District	Curricular	Extracurricular	Incidental
Coquitlam	course fees for foods and textiles, metalwork, woodwork, electronics, art, business education, musical instruments, physical education, science, social studies computer studies	clubs, trips, exchanges, graduation sports (equipment, tournaments) school plays, dances, concerts	graduation, student activity, lock, yearbook
Greater Victoria	material costs for woodwork, metalwork, electronics, foods and textiles physical education, art, musical instruments	clubs, band and field trips graduation sports (equipment, tournaments), school school plays, dances, concerts	graduation, student council textbook yearbook
Gulf Islands	material costs for woodwork, metalwork; basic fee plus material costs textiles	clubs, field graduation exchanges sports (equipment, tournaments), ski trips school plays, dances, concerts	lock

cont'd

Table 7. Cont'd

District	Supplementary/ Special programs	Provision Without Fees
Merritt	summer school, correspondence	required courses, agenda books alternate school, workbooks international education
Richmond	summer school, correspondence, international education	required programs, activities and materials; textbook
Vancouver	summer school, correspondence, international education mini-school	required courses, musical instruments, alternate school, textbooks, advanced courses
New Westminster	alternate school, correspondence, international education	required courses, summer school, textbook
Coquitlam		required courses, correspondence, alternate school, international education, textbook, agenda book
Greater Victoria	non-resident student services, correspondence summer school international education,	required programs, basic materials in workshop courses, alternate program
Gulf Islands	correspondence	required courses, summer school, agenda book, student council, athletics, yearbook, international education, advanced courses

Information provided by district personnel.

they did not usually identify these events as being required. Course electives often mentioned as being required. Course electives often mentioned as requiring fees were: art (including photography); home economics (including clothing and textiles and foods and nutrition); technical studies (including woodwork, construction, metalwork, electronics, mechanics, and art jewelry); and physical education 11/12. Three district officials reported that students paid basic flat fees, or "course" fees for given course electives. In one district, all students enrolled in art, foods and nutrition, technical studies, and business education paid flat fees. In another, students paid fees for similar kinds of programs. In yet another district, not only did students pay a basic fee in programs traditionally requiring fees for consumables, but they also paid "course fees" for workbooks and study guides in science, social studies, law and computer studies. Students in those three districts, like the other four, also paid fees for project materials and supplied instruments for band. Music is a good example of how district policy differed on fees for electives. In one district, officials reported that students were supplied with district instruments if they were unable to supply their own. However, in another district of similar size, officials stated that students were required to possess their own instruments.

All school districts' authorities reported extracurricular activities and events for which students paid costs. Extracurricular fees were those expenses incurred by students for activities or events occurring outside the regular time scheduled for classroom instruction. Those activities were commonly regarded by school authorities as being voluntary and students did not receive credits towards graduation for participation in such activities. Examples of extracurricular activities were: field trips (not required for courses), band trips, student entertainment, clubs, and sports. According to reports, any extracurricular activity was regarded by the Ministry of Education and the British Columbian Teachers' Federation to be a voluntary

activity and therefore students were expected to pay for it through fees or by funds raised by the school.

Incidental fees did not apply to either curricular or extracurricular courses or activities. Although they paid for items or activities considered to be voluntary, they were different from extracurricular fees in that they were imposed and collected by the school at the beginning of a school year. Also, they often covered costs for specific items or activities to be possessed, used, or enjoyed by the general student body or large segments of it. Examples of items to which this type of fee was applied were: agenda books, locks, yearbooks, graduation cap and gown, athletics, student council, and mailings. All of the district officials, apart from the one, indicated that students in their districts paid several incidental school fees. In the single district the only item students were required to pay for was a lock for their hall lockers.

Supplementary and special program fees were charged either for a program that supplemented the regular school program, replaced regular schooling for special groups of students, or was offered to international (visa) students. Summer school, correspondence education, and alternate education for students at risk of dropping out of school were examples of supplementary programs; and international education was an example of a special program.

Of the seven districts, four did not offer a regular summer school program to senior high school students. In one district, summer school and correspondence were sometimes the same thing as students attending the high school are given the option of completing failed courses by correspondence. This use of correspondence education is outlined in a brief prepared by one of the superintendents of British Columbia who was not included in the sample of superintendents of schools interviewed (Appendix H, A Brief). The brief addressed the changes by the Ministry of Education to the funding of in-school correspondence students and recommended that those changes be withdrawn. It further explained that schools sometimes

identified the portions of a failed course that were inadequately completed by students and then had the student complete only the relevant assignments of the correspondence course. Upon satisfactory completion of the work, the school granted credit to the student. One district offered summer school to students at the junior high level but found it unnecessary to do so at the senior level as the semestered system operating in the district offered courses to meet graduation requirements more than once a year.

In the case of the other two districts, summer school was not run because their small size made it uneconomical to do so. Students who wished to take summer school to meet the either the next grade level or university requirements attend a neighboring school district and pay the fees charged by that district. All summer school programs, where they were available, were operated on a self-sustaining basis which required student fees.

The second supplementary program, correspondence education, is provincially operated under nine regional centers. Recent policy changes have seen increases in fees. Ministerial statements have indicated the intention not to "double fund" students for correspondence courses who are in full-time public school. There are a number of reasons why students simultaneously enroll in public secondary schools and correspondence courses. School districts use correspondence to supplement regular programs in a number of ways: 1) to offer a course not available at a school because there is no specialist teacher, or because the class or school is small; 2) to resolve a timetable conflict; 3) to allow students absent from school for medical reasons to maintain their learning at a regular pace; 4) to provide instructional support to bridge gaps in educational programs that cannot be met by the district or school; 5) to provide an instructional program for students under suspension (as required by the School Act); 6) to enable selected students to learn at a pace appropriate to them by providing additional instructional support; 7) to provide students enrolled in small rural schools additional educational

opportunities to support their progress to graduation without leaving their communities; and 8) to provide an alternative to summer school (Appendix H, A Brief). Small schools and districts seemed to derive much instructional support from regional correspondence schools.

Districts differed in terms of the number of students enrolled in correspondence education courses; however, in all seven of the districts in the study some students were taking one or two courses. The number of correspondence education courses taken by students in the seven districts during the 1990-91 school year ranged from 78 to 652. The actual district costs for those courses ranged from \$3,900 to \$32,600 (Appendix H, A Brief). In all of the districts except one, students paid the required fee when they register for a correspondence course and the correspondence school collected that money from the public school attended by the students. If students passed the course(s), they were reimbursed by the schools in at least two districts. The general policy was that if a student needed a course to complete graduation requirements, and was somehow disadvantaged by the school, then the school absorbed the costs. In the one district, the fee payment rule was not rigidly imposed on students. Another district absorbed the cost of correspondence courses for students enrolled in a special education outreach program. That program offered instruction and support services to secondary level students who were enrolled in correspondence courses. In that case, correspondence education and the district alternate school program were one and the same.

The third type of supplementary program consisted of alternate programs or schools offered in every district in a variety of ways. On one hand, students who were strong in academic areas and motivation were sometimes offered special programs such as a mini-school program to which parents contributed substantial amounts of money. On the other hand, districts also offer special programs for students at risk of dropping out of schools as well as for students who were performing below average in several areas. Only one district reported that

students in their alternate school for students at risk of dropping out of school paid a fee for participation in after school activities.

The international education program is categorized as a special program because it is regular schooling made available to foreign students. In British Columbia, most of the students originate from Pacific Rim countries (Japan, Singapore and Hong Kong) and are required to pay tuition fees to secure an education in the British Columbia public school system. Only two district officials of the seven reported that they had well developed international education programs for 1991-92. Students in those two districts paid substantial sums of money for tuition and other incidentals ranging from \$7,900-9,450. All other districts had some international students who either paid or did not pay tuition fees depending on their status as exchange or international students and district practices. District officials from three districts indicated that they did not have the facilities or resources to allocate to offshore students who needed special English language teaching. In contrast, two districts were actively recruiting "offshore" students and expanding their international education programs. In one other district, international students from Thailand were reported not to be paying tuition fees for the 1991-92 school year mainly because the issue had never been addressed by the board.

Superintendents reported that policies on school fees were district policies. However, it was acknowledged that fee practices as to how much was charged and for what varied at the school level. This fact was specifically pointed out in one case where the district was implementing school based decision making. Only one district superintendent reported that there were no student fees imposed by schools in his district as a result of the new School Act and ministerial policy. All the other districts reported that students paid fees in the four categories outlined in this chapter. As described in Chapter 1, the current School Act (1989) of British Columbia, Section 100, stipulates that every person of school age in the province should receive

1) instruction in an educational program sufficient to meet the general requirements for graduation, and 2) educational resource materials necessary to participate in the educational program.

Perceptions about whether or not fees were permitted under the current School Act differed among interviewees. The relevant section of the Act was interpreted by officials from four districts to mean that no fees should be levied on students by schools. Officials in three districts interpreted the section to mean fees were allowed for some things. Generally, all school district administrators stated that the policy of their districts was that students should not be charged fees for programs which they needed to complete general graduation requirements. However, schools routinely charged students for activities, materials and supplies in course electives such as: physical education 11/12 (rental and travel costs); home economics and technical courses (expensive materials and consumables); business education (workbooks and computer discs) and art (supplies).

To avoid student fees, school districts could choose to restrict students to more traditional and cheaper programs. Physical education 11/12 is a useful example in which the curriculum may be constrained. In some districts, students were offered a traditional program which did not include activities such as wind-surfing, white-water rafting, horseback riding, sailing, bowling, curling, swimming, golfing and other lifetime leisure-type sports. Rather, students were coached in basketball, volleyball, track and field, badminton and other conventional sports while making use of school facilities and equipment. Therefore the need for student fees to pay for transportation and rental of community facilities was eliminated. In technical studies and home economics, project fees could also be eliminated by restricting students to the learning of basic skills and the production of projects that did not require expensive woods and other materials.

All the interviewees indicated that if the materials students used in courses made takehome projects or if students enjoyed direct user's benefits then they were asked to pay a fee. At the same time, all the interviewees emphasized that, as district policy, no student was denied an opportunity of benefitting from an activity or a course because he or she was unable to pay. District or school contingency funds were made available where necessary to assist students in financial need and fees were waived. The officials indicated that fee waivers would not work effectively in situations where the majority of students could not afford a fee. In some cases, waiving a fee was a more formal process than in others. In none of the districts had parents tried to test the district policy in a court of law.

Officials were asked whether or not there was due process for students or parents who objected to a fee or who were unable to pay. All the officials stated that a formal appeals process existed in their districts. A student or parent, under the current School Act, could appeal a decision of an employee of a school district where that decision significantly affected the education, health or safety of that student. Prior to beginning the appeal, the person making the appeal is requested first to try resolving the matter with the employee and proceed up the organizational hierarchy to the supervisor and board levels only if the dispute is not resolved at the early stages (Appendix H). All the superintendents of schools reported that any hardship cases or objections to fees were commonly addressed informally either by teachers or principals and that generally the fees in question were waived.

Two administrators indicated that political processes, rather than administrative processes, were used in the past to help create the current legislation on fees. Parents had complained about field trip fees in affluent areas of Vancouver and letters had reached Members of the Legislative Assembly and the Minister of Education. When the new School Act came into effect the intention of the Minister was to eliminate fees in public education. Two of the seven schools

districts have acted since the introduction of the new legislation by formulating policies which reflects its spirit. In support of the interview data, written policies were obtained from four districts. A summary of the content of these documents appears below (Table 8).

Table 8. District Fee Policies and Contents (1991-92)

District	Title of Policy	Contents Defined
Merritt	Fees To Students	credit allocation program: textbook deposit; refunds, accounting
Richmond	Tuition fees/ educational materials fees	fees for optional courses; school fees; fines and charges for textbooks
Vancouver	Student Fees, fines and charges	fees for optional courses; school fees; fines and charges for textbooks
New Westminster	No fee policy	
Coquitlam	No fee policy	
Greater Victoria	Pupil fees - supplies/ activities/ materials	required and optional courses activity fees and textbook allocation
Gulf Islands	No fee policy	

Information provided by district personnel.

Results from questions about fee policies and practices revealed that students were charged fees for a variety of programs, activities and items which were classified as curricular, extracurricular, incidental, and supplementary and special. All seven superintendents reported that students were not charged fees in the required programs but were likely to encounter charges in elective courses. In none of the districts were students denied access to an opportunity based on inability-to-pay a fee. Basic or flat rate fees in course electives existed in three out of the seven districts. Summer school programs were offered in four districts: two urban, one suburban and one rural. Some students in all seven districts took correspondence education but only in one district (suburban) were students not required to pay a fee. Alternate education programs were offered in all districts but only two districts required a fee. Four districts (one suburban, one urban and one rural) had established international education programs to some degree and their fee practices varied. Differences existed on the interpretation of section 100 of the School Act. The principle of user's benefit and the expense of consumables were most often suggested as the reasons for project fees. In none of the districts have formal objections to fees been launched. Hardship cases were usually addressed informally at the schools although political pressure from parents against fees in urban districts have been identified as the catalyst for the new school law on fees.

### Effects of Fees

Superintendents gave mixed responses to the question of what effects fees had on students. Four district administrators thought that fees had some beneficial effects for students. They helped to increase students' care of materials, taught students responsibility, gave students

the incentive to finish a task, and helped students to focus their attention on the opportunity available to them. The other three district administrators, expressed different opinions. With specific reference to textbook fees, the one superintendent stated that based on his experience students who paid textbook deposits did not display markedly different attitudes from students who did not pay such a deposit. The other two superintendents thought that there were no benefits from charging textbook fees as students were compelled to attend school and should be provided with the basic materials they needed.

District officials' views were more uniform when asked what school benefits were derived from fees. Six of the seven interviewees stated either generally that schools derived no benefits from fees or more specifically that there were no financial revenues to be gained by charging students fees. They tended to regard student fees as money used to cover the costs of student items or activities rather than being a source of revenue for the school itself. A district administrator indicated that charging student fees could provide schools with some money either on a long term or on a short term basis. That respondent added that where fees were charged taxpayers benefited by paying less in taxes while parents were burdened with "double taxation". On further reflection, three district officials (Coquitlam, Richmond and New Westminister) indicated that when students paid fees the school managed to cover costs to enhance programming flexibility. An official indicated that direct community benefits came from school fees when the fees were used to stage cultural events at the high school for all members of the community.

Responses were varied on the matter of whether student participation in school programs was normally affected by school fees. Three officials stated that fees could likely reduce participation in music, art, student exchange programs, and extended trips. However, two administrators thought that participation levels were not affected by fees because financial

assistance from the district or school could be made available to cover student costs. Summer school was given as an example.

Interviewees were asked if differential costs existed for different groups of students based on the structure of the school curriculum. The answers given were varied. Two superintendents stated that there was no differential effect operating because both academic and nonacademic programs could involve extra costs and needy students received financial assistance from the school or district. Two administrators thought the potential existed for such a differential effect as students in non-academic areas paid higher fees than those in academic areas but they cautioned that the fees in their districts were not great. The remaining three interviewees believed that there was a differential effect in place for students taking course electives. However, the opinions were qualified by statements saying that the fees were minimal and that student in technical areas kept their projects whereas those in social studies or English did not keep their school supplied instructional materials. One superintendent did not think students in athletics were paying differentially higher fees than other students because in his view athletes chose to pursue optional activities. Most of the interviewees believed either that the possibility of differential effects existed or that the effects were clearly evident but they agreed that any differential costs arising from the structure of the curriculum were small.

Both the financial and psychological impact of fees levied on students were addressed by most of the superintendents. Uniformly, superintendents thought that inability-to-pay was of significance when students were charged fees in school as some students might not be able to afford fees. Furthermore, they agreed that fees impacted on different household differently. Consistency was also found on the matter of the psychological impact neediness produced on some students. Students might exhibit embarrassment, reluctance to discuss their financial situation, or avoidance behavior. Only one official indicated that students in his district suffered

no negative psychological effects from acknowledging that they needed assistance as the district was small, everyone knew everyone else, and students were usually open about their financial situations.

Other disadvantages of school fees were noted by three interviewees. First, poor public relations developed between the community and the school when it was perceived that public education, which should be free, was imposing extra charges on students. This was particularly true for parents as they were the ones who often paid the fees. Second, poor relations sometimes developed between students and school authorities because students tended to be complacent about fees and did not like to be reminded. Third, administrative costs were identified as some disadvantages associated with school fees. Three superintendents reported that the administration of fees wasted valuable secretarial time and resources. It was noted by one superintendent that teachers commonly did not like to perform clerical tasks associated with fee collection.

Perceptions on the effects of school fees varied among the superintendents. Opinions were diverse on the benefits of fees for students. Administrators were more consistent as to benefits accruing to the school: most thought there were no major benefits. Perceptions were mixed as to whether or not fees reduced participation rates among students and also on the operation of a fee differential effect. The majority of district officials thought students were psychologically affected by their inability to pay for something at school.

#### Factors Influencing Fee Policies

The question of why a school law existed for fees was aimed at discovering what problems that legislation sought to address. Four superintendents believed that the origins of

Section 100 of the current School Act lay in political pressure being exerted upon members of the legislative assembly and the Ministry of Education. One official thought the law was there so that if a controversy developed it could be said that the districts were managing school fees. As such, the legislation was aimed at allowing diversity in the application of fees. One superintendent thought that just prior to the establishment of the Royal Commission on education in British Columbia (1988) a perception existed that there were inequities in the education system and that some students were being denied the right to enter courses because of fees. Thus, the government wanted to ensure that true equity existed in the system and thought a new law on fees was needed.

A related issue arising during the interviews was the different ways in which the fee legislation has been interpreted. In one district, some confusion arose about how the fee legislation should be interpreted. With no additional money to replace the \$500,000 in fee revenues in place before the 1989 Act was passed, the school board upheld past practice to levy and collect fees as a normal course of the educational program. Thus, "course fees" were still in place in that district for the 1990-91 school year. In another district, the official did not think that the Act influenced current district practice as fees were still charged in course electives, and extracurricular areas as had been past practice. In three other districts, officials interpreted the Act to mean no fees were to be charged to students for anything they needed to complete their educational programs. However, reports from officials of those three districts indicated that one school board eliminated course fees, another continued to allow charges for expensive electives and student projects, and the third continued its traditional practice of setting up a fee structure which has to be annually approved by the school board. In the remaining two districts, the Act was interpreted as allowing fees for some things as long as board approval was given.

Superintendents were asked what trends were discernible in relation to schools fees. They provided three different kinds of answers. Two district officials thought a reduction in the number of fees charged occurred after the School Act came into effect and ministerial intentions were made clear. In one district fees were eliminated because of the Act. Two respondents discerned an increase due to schools offering more and different options to students but they added that the small percentage increase did not keep pace with inflation. An official thought the fee trend had remained flat over the last decade. He noted, however, that a \$10 school fee had been introduced in 1990-91 at the high school but had not been re-applied in the next year because of lack of success. School officials had been unable to collect more than fifty percent of the fees.

District officials consistently indicated that the authority to charge student fees was granted at the prerogative of the school board. Each of four interviewees reported that their Board's prerogative was derived from the current School Act. Tradition (or past practice) was also mentioned by four superintendents as influencing current fee practices in the districts.

Superintendents' perceptions were varied on the topic of how wider societal factors impinged on school district fee policies and practices. For instance, three different opinions about the origins of school law on fees were offered but the majority of superintendents thought political pressure exerted on members of the legislative assembly and the minister of education was the main catalyst. There was some inconsistency in how the school law on fees has been interpreted among districts. Some variation existed also in the responses about fee trends. However, most of the administrators agreed that fees were decreasing because of the Act. They generally agreed, too, that the local school board's prerogative to charge fees was derived from the current School Act.

### Perceptions on Specific Fee-Related Issues

The issue of whether student fees were inconsistent with the notion of "free public education" revealed opposing responses. Four interviewees agreed with such a position, two disagreed, and one suggested it was impossible to have education "without monetary attachment". Of those who agreed, the answers were sometimes contradictory. First, the idea that fees were inconsistent with free public education was thought to have "some merit" because, ideally, students should not have to be charged. However, it was suggested that schools could not eliminate fee charges completely without additional provincial money. Second, fees were perceived as an impediment to the ideal of a "free liberal education" and that was why one district moved quickly to eliminate them after the Act took effect. Third, district officials agreed that public education should be free as students were compelled to attend school. However, they added that unless government funded education so that student could have a broad range of experiences then fees would have to be charged. Finally, it was believed that fees did not relate directly to a good quality education but discriminated between rich and poor students. They were therefore judged, by some respondents, to be an unfortunate part of present day public schools.

Among those who disagreed that fees were inconsistent with public education, one superintendent argued that there was no inconsistency because students could usually proceed through the core program without paying any fees. He noted that it was generally in the electives and special areas that fees were attached and students knew before they registered for such programs that fees were required. Although one superintendent thought that it was a societal norm that if a person wanted something special he or she paid for it, he admitted to

holding contradictory opinions about the issue. He suggested that a needs test on ability to pay should be applied where fees were applied.

More uniformity was discovered among district officials on the issue of whether or not student fees helped to reduced government responsibility for education. Five respondents disagreed that levying had the effect of reducing government's responsibility for education. One superintendent agreed that it could have such an effect, and the remaining official declined to answer the question.

Superintendents were almost uniformly concerned about the ability-to-pay side of the equity issue. Six of them noted in varying degrees that equity was always an important issue in public education. Only one official held a contradictory view. He thought that fair equity existed for students in his district because if students were unable to pay for some things in the curriculum, the fee was waived. In the extracurricular areas, however, there were some students who might be unable to afford a ski trip but that was an optional activity.

Those superintendents who were concerned about equity in relation to fees made several points. Although student equity in relation to fees should always be taken into account, it was perceived to be more a problem associated with fundraising than with fees as fee charging was restricted by law. Equity as an educational issue posed difficulty for teachers, students and parents. In one district, all schools received a given level of funding from the board regardless of the ability of their communities to supplement it. In another district, charging fees in the past had caused "a fair degree of inequality" for students and schools because of the amounts of money requested from students. Equity was an issue in schools as students vary in wealth and public schools had a responsibility to reduce rather than exacerbate those differences. One superintendent argued that students should be able to purchase opportunities in school although

it would be better if they earned them. However, such an arrangement would introduce inequities in an education system that currently failed to adequately fund existing unequal needs.

Five superintendents gave recommendations on fee policies and two failed to do so. Two interviewees were to some degree satisfied with the current arrangement. Two were somewhat dissatisfied and the official from Greater Victoria gave a mixed response. The satisfied respondents replied in the following ways. First, if schools are to be autonomous then they know best what they need in terms of fees. However, money raised through fees should be controlled because of equity concerns. If schools are devoting much time to accounting for fees and fundraising, it was time to re-examine the needs of public schools. Second, it was deemed acceptable to charge a fee for anything that elaborated on the basic educational program. Thus, school sponsored trips abroad and expensive materials in technical studies should be paid for by students but high quality reference books should be supplied publicly.

The two dissatisfied superintendents suggested quite different approaches. First, charges such as textbook deposits were thought to be appropriate. However, all student charges should be made public so that parents knew what charges were required. Also, all core program fees should be standardized across the districts in the core program. The other dissatisfied respondent stated that the current school law on fees was too prescriptive as it stipulated that schools "shall not" charge fees. At the same time, no additional money was made available for important educational resources and activities. He suggested that fees should be limited but more field experiences and supplies should be provided through the fiscal framework and earmarking procedures.

Finally, the mixed response of one respondent started with an acknowledgement of the differential effects of fees caused by the curriculum structure. He thought that fees for enriched materials should remain in place, but that the fee structures needed further study as they set up

a discriminatory class system based on division of fees along the lines of core academic subjects and technical subjects. The effect of that practice was that it produced a negative psychological impact on some students. He explained that one reason why the fee issue had not been reviewed by the district was because the district was going through the processes of decentralization to achieve more school based decision making.

Most district officials agreed with the view that school fees were inconsistent with the notion of public education but divergent views were apparent. More uniformity was found on the question of fees working to reduce government responsibility to education as most superintendents thought this was a false notion. Even more agreement was found on the issue of fees and their potential to cause inequity. All but one of the respondents agreed that concerns for the ability-to-pay aspect of equity was a key issue in fee practices and policies. Recommendations about fees in public education were offered by five of the seven personnel.

#### Location, Socioeconomics and Ethnicity

The seven districts included in the foregoing analysis possessed similar as well as different characteristics. All the districts were categorized by the researcher in Chapter 3 as having high wealth because they fell in the top of three district groups ranked according to the total per pupil property assessment value for 1989. Yet two of the districts (Merritt and Coquitlam) were relatively poorer than the others as their total per pupil assessment valuation fell below the provincial average. Two of the districts were of small size (Merritt and the Gulf Islands), one medium (New Westminster) and four large (Richmond, Vancouver, Coquitlam, and Greater Victoria). With regard to ethnic mix, three districts had low ethnic diversity

(Coquitlam, Greater Victoria and Salt Spring Island), and four had high ethnic diversity (Merritt, Richmond, Vancouver, and New Westminster). Two districts were rural in nature (Merritt and Gulf Islands), three were suburban (Richmond, New Westminster and Coquitlam), and two were urban (Vancouver and Greater Victoria).

Based on the data, a few observations might be made about location, socioeconomic status, and ethnicity. Data from the interviews of superintendents of large, urban districts showed more items for which fees were charged. For instance, more non-traditional physical education courses were available, and summer school and international education were more likely to be operated in large urban districts than in smaller ones. Where summer school operated in small rural districts, special arrangements were made such as utilizing correspondence courses to assist students in completing the previous year's program. Small rural districts were more likely to use flexible, informal structures in dealing with fee practices. For instance, in one rural district, international students were not charged any tuition and in the other one no international program was in operation. In addition, where students experienced financial difficulty school authorities set up informal work programs around the school whereby students could pay a required fee. All of the superintendents made a connection between school fees and ability-to-pay concerns due to low socioeconomic status of families. This was particularly the case in large urban areas. District personnel also exhibited a keen sense of existing pockets of low income residential areas in their districts even in relatively homogeneous suburban districts. Political action by parents on fee issues were more likely to occur in urban centers where relatively high diversity in income and ethnicity coexisted. Large, urban district showed less homogeneity in terms of income, ethnicity and politics than smaller, rural-type districts. Suburban districts fell somewhere between these two extremes in that they were large enough and close enough to urban centers to be ethnically diverse while at the same time being

more homogeneous in relation to income and political activity. District authorities in large, urban centres acted quickly to reduce perceived inequities caused by fees except when decentralization of school district governance was a key factor. Decentralization was named as a variable influencing the variation in school fee practices in one large, urban district. The Gulf Islands district possessed special features which distinguished it from the other rural district (Merritt). It was the third richest district in British Columbia for 1989. Separated from Vancouver and Victoria by water, the district comprises several islands. The attractiveness of the climate and environment experienced by the islands has resulted in the settlement of a high percentage of retired persons. However, personnel from both rural districts reported that students showed openness and ease when discussing any financial hardship related to fees. That result was attributed to the size and familiarity of small districts.

Ethnicity, although an important factor in selecting the sample of districts, did not feature significantly in the comments of the superintendent-rank personnel. In a small, rural type district, the superintendent mentioned that assistance through a social service government department had been sought for one First Nations student who required funding for an exchange trip overseas. During the course of data collection, it was learned that First Nations students attending public schools did not receive any special exemptions from fees. Therefore, it was assumed that they paid fees for supplies and school activities like other students. The Federal government supplied funds to 196 Bands in British Columbia to spend money autonomously for a total of 9,000 First Nations students who lived on reserves. The bands provided money to students to buy the supplies they needed. Money for supplies was allocated by bands in the following manner: all K-12 students received \$200 per student per annum for supplies, grades 8-10 received an additional \$100, grade 11 received an additional \$200 and grade 12 received an additional \$300. District administrators did not commonly make links between school fees

and ethnic background. However, it appeared that districts with high ethnic diversity were also districts with more formalized restricted fee policies. In addition, the highest school fees in public schools were paid by foreign students many of whom were from Pacific Rim countries such as Japan, Singapore and Taiwan. On the issue of fee effects, no patterns were discerned among district personnel connected with opinions on fee benefits, participation, and fee differentials. Finally, district location, socioeconomic status and ethnic diversity were observed to hold some implications for how the data might be interpreted.

### Summary

This section on administrator interview presented results on the topics current fee policies and practices, effects of fees, factors influencing fee policies and perceptions on specific fee-related issues. Students were charged fees for a variety of programs, activities and items classified as curricular, extracurricular, incidental, and supplementary and special. Observed variations in fee policies related to fees in electives, summer school, correspondence courses, alternate education programs and international education. In none of the districts were students excluded from an activity or program because they were unable to pay. Perceptions of the superintendent group varied on the effects of fees. Most interviewees thought no major benefits were derived from fee charging in schools. They also gave mixed responses to whether or not fees reduced student participation and on the operation of a fee differential effect. The majority of district officials also believed that students were psychologically affected by their inability to afford an item or activity at school. The superintendent group offered three different opinions about the origin of the school law on fees but the majority held that political forces exerted on

provincial politicians was the major catalyst. As well, most district officials thought that fees were decreasing as a result of the School Act. On the specific fee-related issues most officials of the superintendent group thought fees in public education was inconsistent with the notion of public education. They also agreed that fees did not pose a threat to government funding and that ability-to-pay concerns were central to a district fee policies and practices. Various recommendations were offered by this group of interviewees.

### Principal Interview Results

This section presents interview results for principals. In the previous section, descriptions of school district officials' perceptions were organized by the topics appearing in their interview schedules. Interview data for principals are organized in a similar fashion. Eighteen principals were interviewed. Data from the interviews were supported by a number of schools documents.

Administrators from eighteen schools in seven school districts were interviewed about current school fee policies and practices. Topics addressed by the interview schedule were: the current fee policies and practices, the administrative processes of fees, the effects of fees, and the factors influencing fee policies. These topics constitute the main sections of this chapter. In the section on current fee policies and practices, school principals detailed the types of fees students paid in their schools as well as provided fee amounts where possible. In the section on the administrative processes of fees, principals described how fees were established, collected and applied. Next, the principals' perceptions of the positive and negative effects of fees are

then described. The presentation of data for principals concludes with a description of their views on the legal and social factors which influenced current school fee policies.

### Current Fee Policies and Practices

Principals identified a variety of fees which were classified according to the definitions appearing in Chapter 4. Several school documents were collected and used to supply or confirm information provided by the principal group of interviewees. Reference documents included: school course selection booklets, handbooks, guidebooks, calenders, budgets and fee schedules (Table 9). Additional source materials such as unpublished papers, briefs and school board by-laws are listed in the Appendix H.

Schools in all seven districts charged a variety of curricular course electives fees in the form of basic fees and costs for materials (Table 10). However, it was not possible to provide the fee amounts for subjects in each instance. Actual fee figures for courses were very difficult to determine for three reasons. First, most course selection booklets did not include what charges were imposed on students even though in many instances additional materials, supplies, and field trips were requirements for completion of courses. Second, in most electives no actual fee amounts could be established as the amount of money spent depended on how much students were willing and able to spend. Third, principals often did not know or could not recall what fee amounts existed for what courses and only four of them provided fee schedules.

Physical education, foods and textiles, technical studies, art, music, business education, and career preparation courses were cited as the courses most often requiring fees (Table 10). Charges for Physical Education 11 and 12 varied across the seven districts and within districts

with a range of \$0-50. For the Foods and Textiles 11 and 12 programs, the fee range was \$0-100. Vancouver school district had both the highest and the lowest fees in those subjects. In several areas of technical studies, students paid extra costs for materials used. Across the seven districts, the range for Woodwork 12 was \$6-1000; for Mechanics 12, \$4-20; for Drafting 12, \$5-10; for Computer Science 12, \$5-10; for Construction 12, \$10-500; and for Electronics 12, \$20-500. Art and music usually cost students some direct expenses for materials and equipment. The range for Art 11/12 was \$5-15. In instrumental music either rental or purchase costs were incurred and they varied according to the type of instrument students chose and the kind of rental or purchasing arrangement made. Very few schools indicated the rental costs for musical instruments but where they were provided they ranged from \$10-80. Students incurred expenses in several areas of business education. Money for supplies usually provided workbooks, computer discs and special computer software. Workbooks or study guides in business education presented a special problem for most schools because, although they were ministry supplied in the first instance, they were not replaced by the ministry once they were "defaced" by students. Thus, schools practiced charging students the cost of workbook replacement as a deposit which was not returned if student wrote in the books. However, in one district, Merritt, student got to use and keep workbooks at no extra costs to them. In another district, Coquitlam, students were charged a course fee for workbooks and study guides as common practice. Among all districts reporting a fee, the range for Accounting 12 workbooks was \$4-\$20.

Still within the curricular fees category, career programs in subjects such as tourism, hairdressing, textiles, and foods and cafeteria often had fees attached to them but the data were sparsely supplied by schools. However, the fee range was \$5-275 across the four program areas

Table 9. Types of School Documents (1991-92)

District	Course Booklet	Fee Schedule	Agenda Book	Newsletter
<u>Merritt</u>				
School A	X	-	-	X
<u>Richmond</u>				
School A	X	-	X	X
School B	X	-	-	X
School C	X	-	-	-
<u>Vancouver</u>				
School A	X	-	-	-
School B	X	-	X	-
School C	X	-	X	-
School D	X	-	X	-
School E	X	-	X	X
School F	X	-	X	-
School G	X	-	-	-
<u>New Westminister</u>				
School A	X	X	-	-
<u>Coquitlam</u>				
School A	X	X	-	-
<u>Greater Victoria</u>				
School A	X	-	-	X
School B	X	-	-	-
School C	-	X	-	-
School D	X	X	-	-
<u>Gulf Islands</u>				
School A	-	-	-	-

Information provided by the school personnel.  
Columns two to four: "X" indicates presence of document.

Table 10. Ranges for Curricular School Fees (in CDN \$) in Secondary Schools of British Columbia (1991-92).

Item	<u>District</u>						
	Merritt	Richmond	Vancouver	New Westminster	Coquitlam	Greater Victoria	Gulf Islands
Physical Education	--	35	0-40	50	10-30	10-50	--
Foods & Textiles	5-15	--	9-100	8-10	5-12	5-46	20-80
Technical studies	5-10	4-1000	5-260	5-10	10-20	3-600	10-100
Art	5-10	--	10-20	8-20	10	5-10	--
Music	--	--	--	5-10	10-80	10-50	--
Business Education	5-15	15	15-20	5	8-15	4-10	--
Career Preparation	--	--	5-275	--	--	10	--
Computer Science	5	--	5	5	10	3-10	--
Academics	--	--	--	--	10-18	--	--
Total ranges	25-55	54-1050	49-720	41-110	73-195	50-786	30-180

Data provided by school personnel.

N.B. Total ranges do not show what individual parents or students would pay because, even with very active students, parents of a given child would not normally pay the total fees for all of the items presented.

Table 11. Range of Extra-curricular School Fees (in CDN \$) by District (1991-92).

Item Area	<u>District</u>						
	Merritt	Richmond	Vancouver	New Westminster	Coquitlam	Greater Victoria	Gulf Islands
<u>Fieldtrips</u>							
Field studies	5-50	5-20	5-20	5-20	5-20	5-50	5-100
Band	--	--	10-600	20-300	--	20-1500	--
Ski	100	--	--	--	--	20-1500	--
Leadership camp	--	100	100	--	--	100	--
Total ranges	105- 150	105- 120	115- 720	25- 320	5- 20	225- 1750	105- 200
<u>Entertainment</u>							
Dances	1-5	1-5	1-5	1-5	1-5	1-5	1-5
Concerts	1-2	1-2	1-2	1-2	1-2	1-2	1-2
Clubs	10-50	10-50	10-50	10-50	10-50	10-50	10-50
Graduation	50- 150	100- 250	0- 250	50- 250	100- 250	0- 250	50- 250
Total ranges	62- 207	112- 307	12- 307	62- 307	112- 307	12- 307	62- 307
<u>Sports</u>							
Football	--	75	45	--	--	--	--
Rugby	--	--	80	--	--	100	--
Rowing	--	--	--	--	--	100	--
Others	0-100	0-100	0-100	0-100	0-100	0-100	0-100
Tournaments	10-50	5-25	5-25	5-25	5-25	10-50	10-50
Total ranges	0- 100	80- 200	130- 210	5- 125	5- 125	210- 350	10- 150
Grand Total ranges	167- 457	297- 627	257- 1237	92- 752	122- 451	447- 2407	177- 657

Data provided by school personnel; grand total ranges equal sum of total ranges.  
 N.B. Total ranges do not show what individual parents or students pay because, even with very active students, parents of a given child would not pay the total fees for all the items presented.

for schools reporting fees. Course electives such as Textiles 12 and Electronics 12 were often offered as elements of career preparation programs hence the high charges ranging from \$20-500 for Electronics 12, and from \$20-100 for Textiles 12.

For the second category of fees, extracurricular, programs were subdivided into three areas: field trips, (school) entertainment, and sports (Table 11). Schools in all districts sponsored a variety of field trips during the 1991-92 school year. Costs for groups of students on field trips varied according to if they were attending a science exhibition, visiting parliament in Victoria, or on a one day trip to a distant historical site. The range across all schools was \$5-100 per trip. Urban districts tended to pay less for short trips as they could more easily use the public transport system. More long-range, extensive trips such as leadership camps, outdoor camps, band trips, and ski-trips would cost between \$100 and \$1,500 each. The total range for field trips was \$5-1,750.

Schools in all the districts, with the exception of one school, had student councils which organized and operated student governments. Student entertainment costs for dances, plays, clubs, concerts and graduation related items, ranged from \$1-250 with graduation related costs being the highest costs in all districts. In the extracurricular fee category, graduation expenses represented estimated costs students chose to spend on items such as clothing, transportation and tickets for the graduation ceremony, dinner and dance. Those costs were separated from the incidental graduation fee which was collected by the school at the beginning of the grade 12 year. The range of total cost for this category of fees was \$62-307 with the lowest cost estimated for one of the rural districts.

Schools in all the districts offered sports as part of their extracurricular programs for which students incurred costs. Participation in popular team sports such as basketball, volleyball and soccer meant students were involved in intramural competitions and tournaments which

imposed variable costs on them in the range of \$10-50 per tournament. Other more expensive sports like rugby, football and rowing imposed relatively high costs for students for equipment and uniforms and were therefore offered by fewer schools. The total estimated range of costs for participation in athletics were \$0-350, with the lowest costs incurred by the school in the Merritt district and the highest being paid by students in Greater Victoria.

In the third fee category, the incidental fee type, schools in all the districts charged student fees ranging from \$5-110, being highest in Merritt and lowest in the Gulf Islands (Table 12). Most schools charged for student council, yearbooks, athletics or student activities and graduation. Textbook deposits were only charged by schools in two districts. The highest incidental fee was charged for graduation (\$110). It was also the fee with the greatest variation largely because schools followed one of two approaches. Some schools collected a relatively small fee from students for the graduation cap, gown and rental of facilities at the beginning of the year and left the purchase of tickets for the dinner and dance up to the direction of the school graduation committee. Other schools chose to collect the total amount of money needed to cover the graduation ceremony, dinner and dance right at the beginning of the year. Total range of incidental charges ranged from \$5-169.

Supplementary and special programs included correspondence, summer, alternate, and international education (Table 12). Costs for a correspondence course ranged from \$0-150, with students in Coquitlam not paying any fee. Summer school included remedial, credit, secondary completion, and secondary preview courses. The range of fees was \$50-250 with students who took courses in neighboring districts, i.e., New Westminster and Gulf Islands, paying slightly

Table 12. Range of Fees (in CDN \$) for Incidental and Supplementary Programs by District (1991-92).

Fee area	<u>District</u>						
	Merritt	Richmond	Vancouver	New Westminster	Coquitlam	Greater Victoria	Gulf Islands
<u>Incidental</u>							
Student fee	10	0-11	15-35	15	20	10-15	0
Textbooks	15	0	0	0	0	10-50	0
Yearbook	20	16-20	20-50	20-55	23	18-30	--
Agenda book	--	2-4	--	--	0	--	--
Lock	4	2-4	4-5	--	2	--	5
Athletics	10	5-10	10	0	0	10-12	--
Graduation	110	40-85	20-40	--	12	20-30	0
Total ranges	169	65- 134	69- 140	35- 70	57	68- 137	5
<u>Summer School</u>							
Remedial and Make-up	50-100	75	72-88	100	--	120	120
Credit and Secondary Completion	--	--	235	250	--	250	250
Secondary Preview	--	--	72-144	--	--	--	--
<u>Other Programs</u>							
Correspon- dence	150	150	150	150	0	150	150
Mini school	--	--	500	--	--	--	--
Alternate Education	--	--	--	50	--	--	--
International Education	--	12000	7900	9450	--	5000	--

Data provided by school personnel

higher sums. An alternate education program for students at risk of dropping out of high school cost students in one school the sum of \$50. Another alternate program, a mini school for highly motivated students and associated with a traditional high school, required a \$500 fee for the extensive field trip experiences undertaken during the school year. Four out of the seven districts provided tuition fee figures for international education, the range among districts for 1991-92 was \$5,000-12,000.

Findings from principals on the topic of fee practices and policies generally supported those of superintendents. Broadly classified, four types of fees were identified and principals were able to supply some detailed information about them. However, as noted earlier, specific fee amounts could not be ascertained for schools in many curricular fee areas. A variety of curricular fees were charged mainly for course electives including physical education, home economics, technical studies, art, music, and business education. The highest fees among these subjects were paid in technical studies, ranging from \$10-1,000. Students in large, urban or suburban schools were most likely to pay the highest curricular fees. Individual extracurricular fee items ranged in costs from as low as \$5 to as high as \$1,500. Fee figures for incidental fees ranged from \$5-110, being highest and lowest in the small, rural districts. Individual supplementary programs cost students in the range of \$0-\$250. Tuition and other costs for international education ranged from \$5,000-12,000.

#### Fee Administrative Processes

There was uniformity among the 15 principals answering the question of how school fees were determined. They indicated that student fees for programs, materials or items were driven

by the need to recover the funds expended by schools. In several cases, "break-even budgeting" and "cost recovery" were cited as major objectives. Fee structures were then shaped by knowledge of what funds were available under the budget of the previous year. No differences were observed among different types of schools on this question.

Generally, principals were sensitive to any suggestion that fees could be used as a mechanism to raise revenues for schools. Seven principals stated that subject teachers were responsible for setting up fees with heads of departments who then reported them to school principals for approval. Two principals in one district reported that they were responsible for establishing fees. In one case, the incidental school fee was named and in the other, costs for paper, mailings and agenda books were cited. No patterns in terms of type of schools and the establishment of fees were evident.

All eighteen schools reported that teachers and office staff collected various kinds of fees from students usually at the beginning of the school year and/or at the start of a new term. Principals suggested that the most effective method of collecting fees was to provide early, clear information to parents and students and to use a well planned, arena-type registration scheduling by grades. Arena-type scheduling for registration required a large hall where several teachers and office staff were available to register students and collect their payments during registration week. Students of different grade levels were scheduled at different times to avoid long, time-consuming queues. After registration week, in most schools, students paid any outstanding fees directly to the office clerk or bookkeeper.

Only two school principals actually indicated that their schools followed the arena-type registration. As a result, they experienced much success with collecting nearly all of the required fees. Most of the schools, thirteen in all, followed a more traditional approach of initial "home room" collection followed by direct payment to the school office. At one school,

the office secretary was largely responsible for receiving all student fees, although teachers did collect some fees for extracurricular events. Subject teachers were usually responsible for collecting money for projects and class field trips in most schools.

Schools varied in the extent to which they experienced administrative difficulties in collecting fees from students. All eighteen principals stressed that the district and school policy did not allow students to be denied access to a school program or event because of lack of money. Fees were therefore waived or flexible payment schedules established where necessary. Twelve of the principals indicated that there were no major difficulties with student compliance in the payment of fees. In those schools few genuine hardship cases were perceived to exist and when they did, fees were waived. One principal among this group thought a small minority of students, about 1 to 5%, did not pay by the end of a year. Lack of compliance was attributed to indifference, forgetfulness, or thoughtlessness. In the senior grades the majority of students had part time jobs and were thought to be able to afford school fees.

Six of the principals indicated some degree of difficulty in collecting money from students. The range of recalcitrant students was between 10 and 50%. The highest nonpayment of student council fee occurred at one school in Greater Victoria. In two other schools traditional student non-compliance was estimated at between 15% and 20%.

Eight of the schools, including five where no major problems were encountered in student fee collection, had some degree of difficulty with receipt of fines for lost or damaged textbooks. Students often graduated from high school without returning books and then they were not pursued. In one wealthy school, the principal reported that some students would rather pay for a lost book than take the time to find it. In one inner city school with a high transient population, the principal reported a significant loss of revenue caused by unreturned books.

Schools pursued various ways of enforcing compliance for fee payment and textbook fines. Three of the school principals did not identify any strategies to enforce compliance. In one of these schools the principal reported that nonpayment of fees was deliberately not pursued zealously because many of the students experienced financial difficulty. For the remaining fifteen, a variety of ways of attempting to enforce compliance were identified including: reminders from teachers or office staff, either orally or in writing; reminders by school administrators; enforcement of deadlines; persuasion, "muscling or blackmailing" students; delay of registration; withdrawal from classes; disallowing participation in practical in home economics or field trips in physical education; withholding report cards, certificates, transcripts, timetables, annuals and transit "go" cards; mailing letters home to parents and telephoning parents; denying access to team and club membership, attendance at school dances, riding on school buses, and attendance at graduation ceremony; and requesting full price for student sponsored events. A combination of strategies seemed to work where forgetfulness was perceived to be the major problem. However, where a tradition of high non-compliance existed or where financial difficulty within the community was apparent those efforts were less successful.

As perceived by principals, teachers and other school personnel held pragmatic attitudes about administering fees. Six school principals advanced somewhat mixed attitudes among their staff. According to those principals, collecting and accounting for fees were time-consuming tasks which teachers did not relish. However, one principal emphasized that use of the home room collection "was the only workable way to do the initial collection". Another school administrator reported that teachers often found the double role of bookkeeper and teacher to be somewhat onerous when they organized field trips. He added that the enthusiasm of teachers for teaching and for their subjects made the tasks associated with planning field trips bearable. Among those respondents, the impression was that charging fees to students was sometimes

necessary. Only one principal reported that teachers disliked collecting fees from students because of the difficulties they experienced in having to make judgements about whether or not students could afford certain fees.

The task of collecting and accounting for fees was more often seen as problematic for office personnel than for teachers. Eleven principals reported that teachers experienced no major difficulties with fee collection. It was thought that teachers were involved only for a short period at the beginning of the school year or term, that fee collection was not time consuming work, and that fee collection was a routine well accepted by teachers. According to those principals, teachers needed simple, clear information if the fee collection was to proceed smoothly. Most principals also reported that teachers generally did not object to charging on the principle that public education should be free. In a few cases, teachers had suggested that fees be introduced or increased so that some instructional materials could be made available to students. No consistent pattern among schools could be discerned on the basis of fee processes. The amount of administrative time, effort and resources expended in the administration of fees and fines varied among schools. Statements from principals indicated that eight schools experienced varying degrees of administrative problems; five had relatively serious difficulties, and another five had no real difficulties at all.

In summary, principals generally suggested that fees were determined by the costs of providing certain programs, activities and items not covered by school budgets. Course fees were established by teachers and general fees by principals. All schools used a combination of arena, home room and school office collection. Schools varied in the administrative and compliance costs arising from fee administration. Most schools had no major difficulties collecting fees. However, fifteen of the eighteen school administrators reported that their schools used varying reminder and punitive measures to enforce school fee payments. The

majority of interviewees reported that teachers had no professional or philosophical difficulties with collecting fees.

### Effects of Fees

All eighteen of the principals and vice-principals directly addressed the question of the perceived effects of fees. Six important issues were evident from their answers. First, fees increased student responsibility, care, or motivation. Second, they acted as an incentive, reward or accountability check for students. Third, fees tended to increase the flexibility of the school and/or the teacher in planning programming and activities thereby increasing student choices. Fourth, fees helped to enhance or enrich programs and activities offered by the school. Fifth, they could assist a school in becoming more entrepreneurial. Sixth, they sometimes attracted more students to enroll in particular programs.

Among the eighteen school administrators, eight supported school fees generally or specific kinds of fees because they believed they helped student to develop intrinsic values of responsibility, care and respect for materials and projects. Textbook deposits were often given as examples. They also thought students produced higher levels of motivation and performed at higher levels at summer school, for example, when they were required to pay. Similarly, students' levels of commitment were said to increase when they contributed to the costs of field trips and other school sponsored activities.

Ten of the interviewees stated that at least one beneficial effect of fees was they worked as an incentive mechanism, value system or accountability check. Textbook deposits were seen as an incentive for students to return textbooks. Fees were perceived as a way of ensuring some

degree of accountability in the system, particularly for senior students. It was argued that students tended to value services and products more if they were involved financially. According to one principal, for "the frill type things" such as basketball tournaments, it was important that students paid so that they learned the value of travelling and hotel accommodation. Charges also provided students with value for money in technical and food programs. Another benefit of school fees was that they were perceived to contribute to the efficient and economical operation of the school system by facilitating purchase of common locks, agenda books and supplies. Finally, one principal suggested that student charges could act as a deterrent thereby preventing students from taking "a free run" in an area such as the grade 12 physical education program.

Eleven school administrators indicated that fees increased flexibility and choice in school programs. They suggested that such charges allowed students flexibility in the choice of projects by not restricting them to what a school's budget could afford to provide. School fees also helped schools to meet the needs of particular groups of students. Student charges were often used to support the operation of programs like the Physical Education 11/12 courses as well as a number of extracurricular clubs and sports. School fees could also be used to assist the staging of cultural activities which could benefit the school and community. Two principals spoke on the issue of enrichment of the school curriculum through application of student charges. The levies when pooled helped to purchase supplementary educational materials and appropriate supplies which were used to offer enriched and exciting programs.

Three interviewees mentioned other issues. One principal stated that if schools had more money through fees they could become more entrepreneurial and improve courses for students. Another one suggested that if school had access to more money through student fees then schools could have more autonomy. The third principal among this group thought that if fees were

charged some courses could be made more attractive to students who would appreciate them more.

Five interviewees noted that there were limitations to fees. Two of them argued that fees or deposits did not always produce beneficial effects because textbook deposits and fines were not demonstrated to be a deterrent to maltreatment or loss of those materials. One principal thought that while summer school fees motivated students to work hard and to succeed, particularly if they themselves paid, fees in the regular core programs were ineffective in motivating them because they were small amounts. Two principals thought that some students were not motivated by fees at all and that for other students any potential incentive for motivation disappeared when parents were the ones actually paying students costs.

It was assumed that fee structures in schools would exert a differential effect on students based on the types of courses they took. For instance, it was thought that students in vocational and technical subjects would experience fees that were cumulatively higher than those students in more traditionally academic subjects. Opinions on this issue, were almost evenly split. Thirteen out of the eighteen principals interviewed answered this question. Five principals thought that there was no differential effect in place determined by program fees, six principals thought that such an effect existed, one principal could not say definitively, and one principal thought there was a potential for such an effect.

Those school administrators rejecting the idea of a fee differential tended to point to the small fee amounts involved, the potential for fee waivers, and the availability of fund raised money for athletes. Fee differential effects were thought to be absent also because some districts paid for advanced placement courses, such as first year university mathematics and physics, as well as for technical studies. The availability of district musical instruments was also cited as an example of the removal of potential fee differentials. Two principals stated there was no

gender differential effect as the programs were largely co-educational except for some technical programs, which attracted mainly boys, and home economics, which attracted mainly girls. Those two male and female dominated program areas tended to help cancel out the fee differences for both groups. Generally, girls were thought to be just as involved in extracurricular clubs and sports as boys.

The six interviewees who supported the idea of existing fee differential effects caused by the curriculum structure usually cautioned that the costs were not extensive and that student costs were often increased by their involvement in optional activities. Students most often thought to be incurring higher costs were those involved in extracurricular activities, particularly athletics. Grade 12 students, students in career preparation programs such as Electronics 11/12, and students who wanted optional things such as video yearbooks and band trips were also groups of students disproportionately burdened by fees. A few principals pointed out that it was known that project costs in home economics and extracurricular programs were prohibitive for students in a few cases. They noted, too, that students involved in vocational-technical programs incurred costs not experienced by their counterparts in the traditional core programs. Another set of students seen to be disproportionately affected by school fees were those enrolled in an alternative program attached to one high school especially since many of those students came from economically disadvantaged households.

Sixteen of the principals addressed the matter of students experiencing embarrassment when they were unable to afford a school fee. Among those, only two principals thought that students did not suffer any embarrassment when they were unable to pay a fee. That was chiefly due to the openness of students in one school, and, in the other, privacy to speak to the principal or business manager about their financial difficulties was assured. The remaining fourteen

school administrators believed that some negative psychological impact was experienced by needy students.

Several situations were observed or hypothesized by those fourteen principals. It was suggested that in some cases students might not reveal their financial need as they might have difficulty discussing their financial status due to pride. Educators did not always recognize what was happening in such situations. Two principals suggested that inability-to-pay for a school activity could ultimately lead to damage of a student's self concept. However, this group of school personnel tended to rationalize such situations in a variety of ways. Some of them stated that such cases occurred very rarely and that other negative psychological effects were experienced by students which were likely to be more important than those arising from inability to pay a fee. An example was the personal difficulties arising from poor achievement and inability of some students to socialize appropriately with their peers. Another principal thought that inability-to-pay was a "grey area" not easily addressed by school authorities. Most principals believed that school authorities approached the matter of students in financial hardship sensitively. Finally, among this group, a few principals emphasized the need for students to accept the reality that due to one's economic situation some items may be simply unaffordable.

Eight principals commented on whether or not the fee structure in their schools affected the level of student participation in given course offerings; their opinions were evenly divided. Four thought that fees did not generally reduce student participation in band, for example, because of their districts' and schools' fee waiver policy. Another reason why student involvement was not reduced was because fees were kept "to a minimum". The other four principals believed that lack of access to certain activities because of student fees presented problems in a few cases. As an example, participation levels in summer school were expected to be reduced for 1991-92 because of the removal of district subsidies to fund summer school

bursaries. It was pointed out by one interviewee that some needy students most likely avoided certain activities or events when faced with a fee they were unable to pay.

Surprisingly, the administrative resources consumed in the collection and allocation of fees were identified by only two principals as negative effects of school fees. In one case, the principal thought that the only real disadvantage of having fees levied in his school was the time wasted in following up on students with outstanding fees. In the other case, the principal spoke at some length about the secretarial time and effort required to process and account for fees in the school, particularly as the school was short of office staff.

Four principals suggested that fees imposed a financial burden on students and their parents and discriminated among students on the basis of wealth. Given that preparing students for school each year was expensive, one school administrator thought any school fees constituted an added burden. September was identified as a particularly expensive month for students and their parents. The principals pointed out that sometimes the financial impact of fees was lessened in senior high schools by the fact that many students worked. However, the principal of a poor inner city school stated that students in his school who had part time jobs used their wages for necessities such as paying their rent, and purchasing food and clothing. Many of the students in that school were not wealthy and some were even living on their own.

Thirteen school administrators commented on what would happen to school programs if fees were eliminated. Responses were varied but eight principals thought that complete elimination of fees in their schools would lead to curtailment of some items and activities. Three interviewees disagreed with that assertion and the other two were unable to give definitive answers. Those items which were most likely to suffer curtailment were: yearbooks, agenda books, grade 11 and 12 lifetime-sports programs, expensive or sophisticated projects in technical studies, athletics, extracurricular programs, home economics and keyboarding, television and

film programs, and specialized career preparation programs. Of the two principals who were not definitive in their answers, one suggested that teachers were often able to adapt and make different decisions about what kind of program they would teach when faced with reduction in budgets. Art was given as an example. The other principal thought that the potential existed for the removal of summer school subsidies to badly effect the education of some students.

A diversity of opinions was offered on potential fee effects. Most of the principals supported the imposition of fees as they believed intrinsic values were developed when students were required to contribute financially to some school programs, activities and items but several of them did not agree with this view. The majority of principals thought fees operated as external incentives, motivators or accountability checks. At the same time, they increased and enhanced program flexibility. Consistency was also found on the question of students experiencing embarrassment when identified as needing assistance from the school. Most principals acknowledged that such a negative psychological impact was likely to happen to at least a few students. They agreed too that fee elimination would mean some program curtailment or cuts. Respondents were more evenly divided on the questions of whether fees reduced participation levels and if fee differential effects, i.e., that students paid different fee levels based on the kinds of courses they took, were observed among students.

### Factors Influencing Current Policy

Sixteen principals gave a variety of answers to the question about fee trend over the last decade. Seven suggested that fees had decreased after the Act came into effect. Three principals saw no real change over the last decade even within the context of the new fee

legislation. Essentially, fees had remained flat over the last decade. Four principals thought there were increases of different degrees. For the first group, the Act was perceived as reversing a trend of increasing numbers and amounts of fees charged. The district policy on fees was said to have moved over the last ten years towards more subsidization and fewer fees. According to one principal, the Act and the policy of his district had eliminated fees that were previously charged to pay for workbooks and basic materials. Among those who thought fees had increased, three interviewees noted that those increases had been small, perhaps not even keeping pace with inflation. One of those school administrators, indicated that course fees had not risen over the last decade but charges for student council, graduation, school annuals and summer school had increased.

All fifteen principals who responded to the question about the necessity to charge students fees suggested that some specific fees were indispensable. A number of reasons were given. First, fees were initially established because of the financial difficulty experienced in some school programs, mainly in course electives. Second, the money raised by student fees was applied to various aspects of the educational program that received no other resources. Third, fees were perceived to be necessary to provide some programs or activities for particular groups of students and it was argued that the entire school body should not be required to subsidize them. Fourth, in the case of athletics fees, traditionally deposits were made on uniforms to help replace loss and damage. In addition, athletics and transportation were expensive items and athletic events did not usually generate large enough gate receipts in most schools to pay for those areas. Fifth, fees often covered the cost of consumables used up by students. Finally, it was observed that although generally fees were not absolutely necessary for courses since teachers and students could adapt to working with basic materials, in extracurricular areas such as athletics and student council fees were critically important.

All the school administrators were generally aware of section 100 of the School Act and the attempt in that section to address the issue of school fees and deposits. Yet three interviewees were, however, not completely comfortable with the specific content of that section. All seven of the school administrators in one of the large urban districts were very knowledgeable about the specifics of section 100 of the School Act.

Only two school administrators were aware of isolated parental complaints about fees. All the other principals indicated that fees were accepted by students and parents as a normal aspect of school life. However, thirteen principals suggested that the main factor driving current fee policies and practices was political activity. This activity exerted enough pressure to cause the formulation of new legislation. That legislation was translated into ministerial guidelines and school board policy. Five school officials in this group mentioned political lobbying by an organized group such as the British Columbia Confederation of Parents, citizens during the hearings scheduled by the Sullivan Commission, and exertion of pressure on local members of parliament as factors helping to produce the new legislation. Two school officials were not sure what factors were driving the policies. In connection with this issue, six principals also stated that financial need shaped their schools' fee practices.

It seemed as though socioeconomic status was related to the level of administrative difficulties schools experienced with student fees. Schools in low income areas were the ones most likely to have problems with fee collection. Particular schools in suburban and rural areas seemed to be affected by other factors like traditional inefficient fee collection practices or high student noncompliance. No clear pattern emerged among schools either on the topic of the beneficial effects of fees or on the fee differential question. Since most schools would have to curtail or eliminate some activities or items if fees were removed, dependence on some fee levies did not seem to be in itself a factor related to level of school wealth. Principals who insisted

that no school programs would suffer cuts with the elimination of fees were also the ones who indicated that very few fees were charged in their schools. However, urban districts appeared to be directly affected by political opinion about school fees as well as small, rural districts with tightly structured community-school relations.

In summary, the views of school administrators on what factors influenced the current school fee practices showed a high degree of consistency. A majority of principals who answered the question thought fees had decreased after the School Act came into effect. It was consistently agreed that fees were necessary to support consumables in electives, activities in the extracurricular area, and incidental items. A few principals had some experience with parents who were dissatisfied about fees charged by their respective schools but on the whole fees were generally accepted by both parents and students. There was a tradition of schools charging fees for activities and items such as student council, athletics, and field trips. Students therefore expected to pay some fees at the beginning of the school year and were ready to do so. Principals attributed changes in fee policies to political activity at the provincial and local district level.

### Summary

Findings for the principal-rank group were presented in this section organized under the headings current fee policies and practices, fee administrative processes, effects of fees, and factors influencing the current policy. The data provided by this group supported that of the superintendents. Results included: four types of fees; curricular fees were mainly charged in the electives courses; the highest fees were paid in technical studies, art, music and business

education; students in large urban and suburban districts were likely to pay the highest curricular costs; individual extracurricular fees ranged from \$5-\$1,500; fee figures for incidental fees ranged \$5-110; individual supplementary programs ranged from \$0-250 and international education ranged from \$5,000-12,000. In relation to administrative process, fees were established based on program and item costs supplied from principals and teachers. School varied in the administrative costs associated with fee collection and application depending on the combination of fee collection procedures and fee enforcement strategies employed. In principle, teachers were not perceived to be in opposition to fees. In terms of perceived fee effects, a majority thought fees operated as external incentives, motivators or accountability checks. Most principals also agreed that among the few students unable to afford a fee some potential psychological effect was experienced. Principals stated that elimination of fees would lead to some curtailment of programs or activities. They were about evenly divided on whether or not fees reduced student participation or affected groups of students differentially. Finally, school administrators were consistent on the factors influencing current school fee policies. They thought that fees had decreased after the school Act came into effect, that fees were necessary to support consumables in electives, activities in extracurricular areas and incidentals, and that on the whole students and parents accepted some school fees. Changes in the school law on fees were attributed to political forces in the province.

### Teacher Interview Results

In the following sections results from teacher interviews are presented. The data are organized according to the subject areas taught by teachers. Each teacher was posed the

following questions: 1) What are the fee practices in your subject? 2) How are the fees established and applied? And 3) What are the effects of fees? Twenty-one teachers from five districts and twelve schools were interviewed.

### Technical Studies Teachers

Eight technical studies teachers were interviewed from five districts and eight different schools. All eight teachers reported that students unable to pay fees in technical subjects would still be able to participate in the programs but that the more elaborate and expensive projects would be unavailable to them. The major difference among the schools was that either a basic flat or "workshop" fee was applied or it was not. In all cases, students paid various sums of money for projects. Inconsistencies on the flat fee existed across districts and among schools in the same district. In Greater Victoria, for instance, one school has levied a shop fee of \$10 for at least 12 years, whereas in another school in the same district there was no such levy. Richmond and Vancouver schools were consistent in this regard, having removed shop fees after the School Act came into effect.

Flat fees in technical studies were established largely based on financial need. As an example, in one school in Greater Victoria, the \$10 fee was determined "by the market and the need to replace lost tools". The amount was thought to be "consistent with other nominal fees" and, in the case of the automotive shop, with the need to build in an insurance fund. In all schools, project fees were generally determined by the cost of the materials that students wanted to use and ranged from \$6-1000 among all schools. Projects were designed, priced and modified by students with some guidance from instructors.

A mixture of subject teacher and school office collection was used by schools for fees in technical studies. Two of the eight technical studies teachers refused to collect fees as they felt strongly that it was not part of their job. Two other teachers indicated that traditionally in their schools student paid fees to the office accounts clerk. Another three reported that subject teachers were responsible for collecting and using fees. Where basic flat fees were applied they were used to build up a small cushion of discretionary funds used to buy manuals, shop equipment and consumables. Project fees were applied directly to cover student materials which were often purchased from the schools. According to one technical studies teacher fee collection for his subjects was sometimes "traumatic" as many students did not appear to take deadlines seriously. However, some diversity of opinion was evident as to whether fees should be collected at all among teachers in this program area.

Fee effects were broadly classified as positive or negative. Four technical teachers thought that enrollment in technical studies was directly influenced by student charges. They suggested that some students could not afford large, relatively expensive projects. Also, two of these instructors noted the existence of a higher differential fee for students who were in technical areas as opposed to those in core areas of the curriculum. However, three of the eight technical instructors did not think ability-to-pay affected participation levels in their subjects because the catchment areas of their schools were in high income areas. Half of the technical teachers thought fees could potentially cause embarrassment for a small number of students, because of inability-to-pay. Other problems associated with fee collection related to some students' desire to challenge authority by not paying fees. Some teachers did not like devoting time to fee collection and accounting and a few others experienced discomfort when collecting money from students.

Two positive aspects of fees were thought to be: enhancement of programs and the good intrinsic values students developed from paying fees. Four instructors thought there was no intrinsic value in charging students fees. They argued that students' commitment or interest level was not raised by the payment of a fee for materials but by the degree of labour and skill required for completion of projects as well as by the type of projects students chose to do. For example, students were careful with possessions which they brought from home to work on in the workshops. They also tended to be more thoughtful with metalwork than with small woodwork projects as items made of metal often required more time and skill to complete than those made of wood. Three teachers thought that fees benefitted programs and students because they removed the limitations of students having to pursue traditional, mundane projects thereby facilitating experimentation. As a consequence, students' motivation and commitment tended to be heightened. Differences of opinions on this issues occurred among teachers within the same district.

#### Physical Education Teachers

Five physical education and athletics instructors were interviewed in four districts and five schools. The practice of charging fees was reported to be standard for all extracurricular sports in all the schools. Students who were members of teams participating in inter-school zone competitions could incur substantial additional expenses. All five instructors reported an athletics or activities fee ranging from \$5-10. Expenses for athletes ranged from \$0-1,500 depending on the sports students chose and the level of participation they displayed. Schools varied on whether or not students were offered a non-traditional physical education program and

the amount of money required. In Greater Victoria, both schools had a leisure-type sports program for which students paid. In one school in Vancouver such a program had been disallowed by the school and students received a more traditional course without a fee attached. In Richmond, students "paid as they played" for bowling, golf, ice-hockey, and sailing. Fees ranged from \$25-50 among the schools.

Opinions were consistent about whether or not fees should be levied to offer an enriched program or if students should be provided with the basic program at no additional costs. Four out of the five physical education teachers endorsed the practice of charging fees for physical education.

All instructors for physical education and extracurricular sports reported that charges were determined by the costs of given items, such as rental of community sports facilities, transportation, rugby or football uniforms, registration fees, and referee fees. The collection and application of fees were characterized in two ways. One, athletics fees were collected along with general school fees and allocated to athletic departments. Two, course fees for transportation, rentals, and tournaments were largely collected and handled by the sponsor teacher who then paid them into the central fund where necessary. With the "pay-to-play" practice in operation at one school students had a choice of paying fees for use of facilities and equipment only at the time they participated in the activity, or submitting a check for \$30 to the instructor or the school secretary. When students chose to pay at the time they participated in a sport, a student leader was appointed to collect the money and settle accounts.

This group of instructors did not usually experience great difficulty with collecting charges from most students due to financial difficulty. However, some difficulties were experienced because of student forgetfulness or indifference. Fee waivers were not usually applied to the physical education recreational sports program but a few students were commonly

assisted in athletics. When students delayed payments they were denied field trips, asked to withdraw, or group pressure was encouraged to aid compliance. Some administrative inefficiency was associated with the "pay-to-play" approach.

Three of the teachers emphasized the positive aspects of fees in athletics and sports while two advanced more of a balanced approach. Instructors' enthusiasm for fees rested on three benefits: the ability of fees to increase students' commitment and responsibility to the group; the good value that students received for their money; and the fact that students enjoyed a wider and more exciting range of activities than they could without fees. Teachers also believed that students and their parents were attracted by exotic recreational sports. Those instructors with a more balanced approach thought that fees could prohibit student participation because of inability-to-pay. However, none of the five teachers were particularly concerned with this matter either because they knew many senior students had jobs and could afford to pay or they perceived most students to be from wealthy homes. In a few cases, teachers acknowledged that they were aware of the proportionately higher costs incurred by students involved in two or more sports.

#### Counselling Teachers

Three counsellors at three schools in one district reported that students did not pay any fees in counselling. Thus, they were not involved in the collection or application of any fees. However, as counsellors, they were well placed to recognize when students experienced financial difficulty and to intervene. They reported that where fees presented financial hardship they were waived.

The counsellors differed in their responses to the question of how fees affected students and their programs. Problems with fees were most likely to occur at the beginning and end of the school year. Summer school was singled out as one area that presented financial problems for some students by two counsellors. When that happened arrangements were made with the principal for the school to subsidize student costs for summer school. However, such bursaries were eliminated for the 1991-1992 school year. One counsellor was not sure how students would be affected but at another school the counsellor believed that students needing financial assistance would not be able to attend summer school. Very few students at the third school were enrolled in summer school programs.

One counsellor thought that student participation in special programs, such as the mini-school program, was not affected by costs because parents were informed beforehand about field trip expenses. Furthermore, the school board usually assisted any students in financial need and schools made flexible payment schedules available. However, another counsellor suggested that teachers were not always well placed to judge what students could and could not afford. According to the third counsellor, no differential fee effect existed based on the structure of his school's curriculum as fees were not used for curriculum areas but for extracurricular activities such as student council and clubs.

School counsellors expressed different opinions about whether or not student who needed financial assistance suffered embarrassment. One counsellor believed that students who were in financial difficulty were likely to experience embarrassment when faced with a fee. But such a situation was likely to occur very rarely because that school drew students from a wealthy area. The second counsellor essentially agreed with this view but added that an increasing number of new immigrant students, some of whom were not well off financially, were attending

his school. The third teacher reported that students in his school were very open and therefore had little difficulty in disclosing any financial difficulties.

Positive aspects of fees were presented by only one of the three counsellors. In his opinion, fees presented some opportunities for supporting new and special programs because school budgets did not usually cover such programs. He also thought students themselves felt more commitment when they paid a fee.

### Art Teachers

A total of three teachers in art and drama were interviewed from two schools and two districts. Consistently across the schools, a basic flat fee of \$10 was charged students in senior art classes. In both art and drama students paid for field trips to galleries, plays, and museums. In one school the district board policy had removed fees for introductory art courses and reduced a former \$20 charge for a full year art course to \$10 in the 1991-92 school year. The practice of charging a fee in art had been in place for as long as the teachers could remember.

Teachers reported that fees had been traditionally charged in both schools because school board funds were not adequate to cover all needed supplies and materials. Students also paid for the cost of materials such as paints, canvas, and ink if they made take-home projects. Art teachers collected the money from students, issued receipts and submitted the money to the school office where it was deposited in a separate art account. When teachers placed orders for materials and paid for them, those procedures were centralized through the school accountant.

All three teachers reported some administration problems although the difficulties were not thought to present overwhelming obstacles. Two problems were associated with fee

collection and accounting in one school. First, some students sometimes over committed themselves to extracurricular activities and later, on reflection, cancelled field trips planned by the subject teacher. Second, for the 1991-92 school year the school district allocation of new funds to offset art fees had arrived in the middle of the school year after the regular \$20 fee had already been collected so teachers had to refund \$10 to students. In the other school, problems with collection were thought to be related to students' inability-to-pay. The art teacher who was interviewed indicated that he did not pursue non-paying students and he applied the fee to general materials for the entire class, unlike his departmental colleague who allowed only those students paying fees to benefit from certain materials.

Teachers at one school did not think that fees posed any particular hardship to students, apart from the odd case, and then flexible payments or fee waivers could be established with discretion. One art teacher thought that students tended to be very complacent about the cost of art materials and a token fee helped them to appreciate those costs and to display less destructive, careless behavior. It was thought that some fees were still necessary, for instance, to maintain the upkeep of the school's musical instruments, which commonly fell into poor condition because students did not pay for their use and school budgets were often inadequate to cover those costs. At the other school the teacher disagreed with the principle of fee charging. He thought that the practice of charging flat fees in art and other electives was not right since art was as critical to a child's education and development as English and mathematics. In neither school were non-paying students singled out or denied access to basic materials or equipment in regular art classes.

### Home Economics Teachers

A total of two home economics teachers were interviewed in two schools and two districts. In both schools, students faced additional costs for projects in clothing and textiles in the range of \$25-60 in one school and \$25-80 in the other. No flat fee existed for students in the foods program in one school although the introduction of a fee was planned for 1992-1993. Students in the foods program at the other school have paid a \$20 flat rate for as long as the instructor could remember and an increment was planned for the 1992-1993.

The home economics instructor at one school was not sure how the fee amount for the foods program was determined as it had been in place for over ten years and had not kept pace with inflation. However, in both schools, projects were determined by what students wanted to do and how much they were willing to spend on materials. As well in both schools, students were responsible for purchasing their fabrics for projects. The flat fee for home economics in one school was collected by the instructor, students were issued receipts and the money was paid into the central office as part of the departmental budget.

Collection of fees in both schools posed some difficulties for teachers. One school was situated in an economically depressed inner city area where, in the opinion of the instructor, it had become increasingly difficult to collect money from students. In the other school, recalcitrance was not connected to poverty among the minority of students not paying but to an attitude of rebellion against authority. In both schools, students were encouraged to speak privately to instructors if they had financial difficulty as appropriate arrangements could be made. Both instructors gave students some time to pay fees by scheduling the completion of written aspects before the practical parts. One teacher reported that nonpayment of the flat fee

by the end of term was met by withholding of student reports but the other teacher did not practice such a strategy.

The home economics instructors advanced both advantages and shortcomings in connection with fees. The chief benefit was that they assisted the department in running a foods program which was one of the most expensive programs in a secondary school. In the other school the instructor thought that it would be impossible to operate the course in home economics without student fees as the department was already had an inadequate budget. An instructor suggested that the major shortcoming with fees was that they impacted on enrollment in home economic courses. In both schools, if students did not produce materials for individual projects in clothing and textiles they were unable to complete the course. Another problem was the embarrassment students suffered when they had to admit they could not afford materials. One teacher experienced difficulty when collecting money from students perceived to be poor.

### Summary

In summary, twenty-one teachers confirmed that fees were charged in given subjects: technical studies, physical education and extracurricular sports, art, and home economics. Their accounts generally corroborated principals' reports that fees were set up based on the costs of specific materials and programs. Most subject fees were collected by them, submitted to the school office and orders and payments were handled centrally. While teaching staff generally supported the statements of school administrators that schools did not deny opportunities to students when they were unable to pay for them, in non-traditional physical education programs, for example, students were unlikely to be subsidized by the school. Basic fees in technical

studies and home economics, were inconsistently applied among schools in the same districts and across districts.

The positive effects advanced by all educators included: the ability of fees to increase students' commitment and responsibility to the group, the good value that students received in return for their money, the students' enjoyment of a wider and more exciting range of activities with fees, the introduction of new and specialized programs, and provision of basic, required or extra materials. Physical education teachers generally endorsed fees for their subject because of the perceived beneficial effects while technical studies teachers were more evenly divided on the effects of fees and their application. Reported negative effects of fees included: reduced student involvement caused by inability-to-pay, differential fees among technical studies students and high participating students, embarrassment caused by poverty, student attitudes and discipline problems, time-consuming nature of the task and discomfort experienced by a few teachers collecting fees. About two thirds of all teachers thought fees did not affect participation levels and that inability-to-pay was not a major issue while one third of the teachers disagreed. Those who disagreed were teaching in poor urban, or rural schools. Educators possessed a high degree of freedom to exercise discretionary judgement about how to assist needy students. This was particularly true of technical studies teachers. Staff validated the perceptions of principals that keen technical studies students and those involved in many extracurricular activities faced the highest fee differentials.

In Chapter 4 responses from interviews with district officials, school administrators and teachers were used to examine similarities and differences in their opinions regarding fees policies and practices at two levels of the school system. Data were organized according to the structure of the interview schedules. The next chapter is a thematic analysis of interview data organized around central concepts from the selected review of literature in Chapter 2.

## Chapter 5

### THEMATIC TREATMENT OF SCHOOL FEES

This chapter uses the language of the educators to provide a detailed thematic description of how they talked about school fees. Although many of the same concepts employed in Chapter 4 are invoked, there are important differences between the two chapters. First, unlike the previous chapter this one emphasizes revelation of interviewees' voices in an effort to capture their perceptions and conceptions of reality. Heavy reliance is therefore placed on direct and apt quotations to illustrate issues and principles related to school fees and to make the discussion lively and interesting. Second, first-order concepts are largely derived from the field and are linked to second-order concepts from the literature on privatization and the principles of taxation and fees. And third, the details in this chapter focus on explanations, illustrations, anecdotes, and colourful phrases rather than precise fee numbers as presented in Chapter 4. Consideration is given to the principles of benefit and ability-to-pay subsumed under the equity concept. Subsequent sections use as organizing themes budgetary inadequacy, efficiency, and administrative and compliance costs.

#### Equity: Benefit Principle

Five districts were selected for thematic discussion as they illustrate the different types of districts selected for the study on the basis of district size, wealth, and location. Comments by school district officials either implicitly or explicitly indicated their fee policies included

considerations of the structure of the curriculum, individual benefit or choice and fee effects, and political and social realities. School level administrators and teachers spoke in similar ways to the district officials about the need for students to pay for "extras" in electives, extracurricular sports, and special programs. The benefit principle of equity takes into account mandated programs, electives and extras, and users' benefit.

### Mandated Program, Electives and Extras

Most school officials at the three levels of the education system made their views clear that the application of curricular fees rested on a distinction between mandatory courses and electives.

If the program is mandated by the school there are no fees; like Woodwork 8, every student in grade 8 has to have woodwork, has to have sewing, has to have cooking so there are no fees. But where the courses become electives in grades 9, 10, 11, and 12 then there are fees and the teacher will set the fees (superintendent).

One superintendent explained that course fees were to be eliminated under the School Act but some programs still required fees for their operation.

There are programs that are more expensive. And the way we've tried to deal with them is to say that they are elective programs that are not required for graduation (superintendent).

Outside of the mandated program, extra materials within the basic program as well as all extracurricular programs and activities were legitimate targets for student charges.

In the case of a woodwork class if a student wants to make a walnut chair, which involves very expensive material, I think it's fair to say, "you've chosen to do something beyond the ordinary and therefore you have to pay the costs, and you

own it afterwards -- users' benefit (superintendent).

Such charges were often defined by school personnel as material costs to students rather than as fees.

If the student gets to keep the project then it's not a fee in the sense in which it's envisaged here (in the Act). It's basically the student is supplying his own material because he or she wants something better than what would be offered, the pine is what we offer, you want the oak, you have to pay for the oak (superintendent).

Charges for individual pursuits reflect how within the broader society choices are financed.

And so the extracurricular things are very much related to the individual's own tastes and lifestyle. So I would look at extracurricular in that light and think that if there are costs involved in those activities that they are perfectly legitimate and they are part of our right to be a Canadian and to make choices (superintendent).

In the case of courses outside the regular school program, for instance summer school and correspondence, participating students were said to be "making use of a second chance mechanism to succeed". Therefore, according to a district superintendent fees were permissible.

Student council and graduation fees were regarded by the district official as student imposed and applied.

We see that (student council fee) as a student to student fee. It is to operate the student council events so again most students would pay that. If someone couldn't afford to pay that they wouldn't be penalized in any way. But we don't see that as falling under this provision of the School Act because it's not the school board that's collecting it. It's not the school that's collecting it. It's the students themselves, for their student events (superintendent).

Students were to receive the basic education program free of charge both for courses to meet graduation requirements and for basic materials used in course electives. When students chose certain activities, programs or materials outside that core program in course electives, or when they elected to participate in extracurricular areas or supplementary programs then they faced costs not always recognized by the school as a fee.

### Users' Benefit

The equity issue, on the benefit principle side, was often applied when a minority of students required special services for which a school had no budget. It was related, for instance, to co-operative education ventures.

Everybody should have access to the program that will make them able to enter the society as an informed individual. So if you want something that is special, it's sort of a societal norm that you pay for it (superintendent).

The user benefit argument was also made in relation to work experience programs.

We have work experience programs, and we have work shadows. They are very individualized type programs. And we are moving more and more in that direction, towards very individualized programs. I think there is an individual cost. I think there has to be one (principal).

Most superintendents speculated about the change in the method of paying for correspondence education and the proposed increase in fees. They thought the changes were attempts to shift the costs from the Ministry of Education to districts and to help the correspondence schools to break even financially. One district superintendent explained the change in terms of a user pay system.

It's just the decision on the part of the Ministry of Education not to pay the bills that are incurred in providing correspondence courses. It was largely subsidized by the Ministry, now it's more on a user pay basis.

Among subject teachers, the theme of users' benefit was recurrent. Some thought that apart from possessing the project for which they paid students in shop courses benefitted in other ways.

And of course here is a person who is given 100 hours of shop time for \$10 and at their disposal equipment that they could never afford themselves. So I think the \$10 is quite reasonable. It could probably be defended to be much higher (technical studies teacher).

Furthermore, some students in technical studies, for example, were said to benefit more because

they consumed more materials than other students. Among school employees at the three levels of the system, the user pay rule was advanced when individualized benefits to students were observable.

In this section the benefit principle of equity was examined under two subtopics: 1) the mandated program, electives and extras and 2) users' benefit. Application of curricular fees rested on the distinction between the provincially mandated program on one hand, and course electives on the other. Apart from the core program, extra materials and extracurricular programs and activities required fees. The benefit principle rule of equity was often applied when a minority of required special services or items for which the school had no budget, e.g., with co-operative education ventures, work study and correspondence courses and technical studies.

#### Equity: Ability-to-Pay

The second equity issue, ability-to-pay, was addressed by various mechanisms in schools when it was known that a student was experiencing financial difficulty. The strategies were dictated by provincial and school district fee policies which intended that students not be denied an opportunity for financial reasons. In cases of inability-to-pay, schools often absorbed part or all fees while allowing students opportunities to participate in given activities or programs. Fee waivers, student bursaries and reimbursements, fees as minimal and sensitivity to poverty are each dealt with in turn in this section.

### Fee Waivers

Arrangements for financial assistance were generally made when student need was made evident to teachers, counsellors or principals. The school administration might make informal checks with the parents of the identified student after which the fee was usually waived. No means test was applied. Administrators may have avoided lawsuits by waiving fees for parents who complained.

In one rural district, students who were unable to pay for "basic" materials were usually assisted through school contingency funds or from other departments (e.g., the Department of Human Resources). In another district similar in size the philosophy of "free" education was given high prominence to the degree that some programs which normally required a fee in other districts were available without direct charges there (e.g. adult continuing education, advance placement through correspondence, and international education). School authorities were sensitive to fact that a wide spectrum of socioeconomic groups resided within that district.

This community covers a large socioeconomic group of parents and families, from doctors to a lot of unemployed people -- self employed would be a better way of describing people -- from artists to ferry workers, to farmers, to fathers and mothers (district official).

Some fees were considered unaffordable. For poor families with as many as four children in the school system some fees would be unaffordable in that district. In such cases, informal, flexible arrangements were made for school fees.

But again you have to look at it with a certain amount of flexibility, that if a student can't afford the fees then it really is up to us to waive them or make allowances or work around that. And over the years at the high school I've seen where we've just paid the fees for an art class. I've also seen it where a teacher insisted this student put in 10 hours of work around the school to cover the cost of the fees. I've also seen social welfare or community aid societies step forward and paid fees. Nothing is written in gold or in black and white (superintendent).

In one suburban school, as a result of ministry guidelines for fees, the district virtually eliminated course fees in the secondary school system. However, in the past, schools waived fees for needy students.

I would say that any student who wanted a course and was unable to pay the fee, if they had come to us or said to the principal "I have a problem. I have no money. I have to go home and care for my family after school, I can't work". There would have been no problem. We would have paid the fee. The fees were not big, \$5 or \$6 so it would not have been a problem for the school (superintendent).

The ability-to-pay principle was addressed in one large, urban district, by guaranteeing basic materials and providing assistance to needy students even for an expensive program like Physical Education 12. The superintendent issued a cautionary note, however.

Now, if everybody in the class asked for that support they couldn't do it. But if there are one or two students, whose parents are having problems, then they can fund it (superintendent).

That money came from one of two district sources:

Now some of that (money) can come out of the \$10 and others will come out of resources that the Associate Superintendent in the area has. We have a \$100,000 account that is divided among the five area superintendents. It is not divided on the basis of population, it's divided on the basis of socioeconomic need. So \$85,000 to \$90,000 went to the east side of the city. Again, recognizing that their parents were less able to pay and we were trying to provide somewhat more equality of opportunity (superintendent).

In the other large urban district, a general policy of assistance for hardship cases was stated.

Now what we do in a semi-formal way is those students who are in financial difficulty, it is expected that the teacher will know that and in collaboration with the principal make some arrangement to deal with that (superintendent).

During the course of routine, daily operations teachers, principals and counsellors were in a position to identify students in need. The fee waiver was often an arrangement, used informally and discretely, to meet the needs of students in financial difficulty.

### Student Bursaries and Reimbursement

Some district funding in large, urban districts was available for student bursaries in summer school and for reimbursing students who successfully completed correspondence courses. The summer school bursary system in one district was designed to support a minority of students.

There are fees now for summer school because after all the students has the opportunity for 10 months to be successful and has been given a second chance so there is going to be a fee associated with that. However, there is a set of money set aside for that because we don't want kids to be excluded from that opportunity because of financial situations (superintendent).

A similarly operated system existed in the other large urban district. It was in the area of correspondence education that ability-to-pay issues were being increasingly balanced against the district's budgetary capacity as fees doubled and public school students continued to enroll.

We used to pay the fees for correspondence courses but they have gone up now, this year to \$150 per course. And so we have advised schools that they have to make it very clear to the students that if the students want to take a correspondence course to accelerate their programs to be very clear on who is paying the fee because from the school district's point of view we have no intention of paying it (superintendent).

Principals confirmed the statements of superintendents that their schools made provisions for needy students. However, comments and arguments revealed differing degrees of concern with student equity, taxpayer equity and school budgets.

### Fees as Minimal

Many interviewees quickly dismissed inability-to-pay among students as a problem even

as they admitted that it was difficult to know the financial situation of a family. Educators in relatively poor schools were not necessarily more sensitive to the issue of student fees and financial need.

Well, I don't think the fees are big enough to have that big an effect. Because I think the biggest fee we have got is \$10. Now, that doesn't mean to say that a kid who is taking woodwork, he may pay \$10 in one class, \$10 in another class, so he may end up paying \$30, say in three classes. There aren't any who have more than maybe four - \$40 maybe a year. So I don't see that as being a big problem, and if there is a financial problem well then as I say, we do scrap the fee (principal).

The same principal had no trouble with the notion of imposing a "user fee" in education as a deterrent to abuse.

In the other small rural district the principal admitted that there was "quite a population of people who can't afford" fees. The school often subsidized needy students who indicated their parents could not pay for a ski trip. However, extracurricular costs to students according to that principal "really aren't that high", and furthermore, it was said that teachers would not exclude a student. The interviewee summed up the disadvantages of levying fees in the following way.

The only disadvantage is collecting, and ensuring people will pay, sort of the mechanics of that at the beginning. You have a fee and you have to collect it and then there are a few kids who can't afford it and you have to then deal with them. But I don't see that as a big issue. I don't see a lot of disadvantages (principal).

Principals working in a school situated within a large, urban district operated in environments which were relatively more highly politicized than smaller more rural type districts. However, their awareness of inability-to-pay concerns due to concentrated pockets of poverty was dependent upon the socioeconomic status of the immediate school catchment area. For example, the following comments were made by a principal in a large, urban district. The school was situated in a wealthy area of professional and business class households and the parents were described as "pro-education".

In this area, because of the affluence here, it (fee collection) is generally not a problem. It is not a problem from the point of view of people not having it. Sometimes kids present problems in terms of getting hold of them and tracking it down (principal).

This school principal admitted that educators never really knew what "a person's home situation is" and added that the impact a \$10 fee on a poor family was not the same as that on a wealthy family. However, that school's administration tried to be conscious that children from "two small lower income housing developments" attended the school. Another principal in the same district operated in what was termed a "blue collar" area. He was rather complacent about equity in terms of ability-to-pay. Fees were perceived by him to be really a "non-issue" as poor students were assisted in many areas (e.g sports, graduation, and musical instruments) if they made their situations known. In other areas, the amounts of student fees were not thought to be very much.

In wealthy suburban schools, inability-to-pay was not generally regarded with much seriousness. It was noted by all three principals in a suburban district that many high school students worked and could afford school costs. School fees were currently levied within the context of a district policy-change five years previously aimed at eliminating course fees. These three schools, as did all seven in one of the large urban districts, received additional money to replace the fee money formerly collected.

### Sensitivity to Poverty

School officials showed varying degrees of sensitivity to the issue of student poverty. One school was labelled an "inner city school" as it was situated in the centre of an urban area.

The principal there rejected the idea that senior high school students were well off. He pointed out that his staff found it difficult to determine who could afford school fees. Poverty concerns in that school could not be mitigated or dismissed by the suggestion that most senior students worked at part-time employment.

We're a really diverse population. We're the real world. Because of our proximity to the downtown area we accept a lot of alternate school kids. Kids who've been kicked out of the home and are living on their own... The kid who works generally speaking doesn't work to put gas in the car. The kid at (this school) works because there is a real need to work to keep body and soul together. While I am generalizing there are lots of kids here who can afford all kinds of things and they work and they have that money and it goes into cars and all kinds of things but we have a lot of other kids... Well let me give you an example. I spend \$3,500 a year in this school feeding kids who can't feed themselves (principal).

Another school administrator in the same urban district, exhibited a pragmatic attitude to charging fees where necessary. He admitted that the school's economic area "was not one of the strong ones". A relatively high number of families were blue collar workers and were on social assistance. According to this principal, that fact did color his staff's perceptions on the ability-to-pay question.

I'll tell you something else that influences you, and that's the area in which you live, too. How enhanced can you make your course, on the basis of how much people can afford? I think teachers are very sensitive to the area where their school is located and what they think they can handle (principal).

The most striking difference between schools from the two large urban districts was that in one district principals were able to illustrate how district policy attempted to reduce problems of inequity caused by student charges. One school board had granted additional money to schools for use "in lieu of fees" for curriculum areas. It had also apportioned district area funds according to differences in socioeconomic status. There was consensus among principals of that district that poorer schools of the district were more heavily subsidized in various areas (music, summer school, school meals) than wealthier schools. Similar strategies had not been identified

for the other urban district.

The school principal of one school in an urban district expressed sensitivity to the fact that many low income families lived in his school catchment area. This principal illustrated how inability-to-pay for expensive "optional items" affected sponsorship of events and activities in the school.

It has been the practice (to rent a hotel for graduation). But I think this school for next year is recommending that we not even offer the option of a banquet next year. We are finding that this year, our participation rate is running around 55% of the grad class which makes us question it. If either they don't want or can't afford to that extent then we shouldn't be doing it, because it puts too much pressure. And there may be kids who are scrounging up the wherewithal to go to the ceremony who really can't afford it. We are very sensitive to that. But that component has always been optional (principal).

Among teachers, concerns about ability-to-pay were limited largely to the poorer schools and subjects such as technical studies and home economics. Although the majority of teachers recognized financial hardship as a potential problem for a few students, most of them did not object to the principle or practice of charging fees.

In this section the ability-to-pay rule of equity was considered under four sub-topics: 1) fee waivers, 2) student bursaries and reimbursements, 3) fees as minimal and 4) sensitivity to poverty. Fee waivers were common strategies in schools when basic materials were needed or when it was perceived that exclusion from activities was likely due to financial difficulty, e.g., in technical-vocational areas and electives. Waivers were used informally and discretely. Reimbursements for successful completion of correspondence courses was a common practice. Fee amounts were often portrayed as minimal amounts of money that presented little financial difficulty for parents or students. District and school officials displayed varying degrees of awareness to the issue of family poverty, with both rural and urban educators indicating the highest degree of concern.

### Inadequacy of School Budgets

The connection between inadequacy of budgets and student fees was made clear by several school level administrators. Financial limitations were illustrated by lack of school funds for certain school organized costly programs and activities as well as by examples of how school budgets existed under some strain. As one principal indicated, the choices for certain program offerings were obvious in the absence of additional district funds.

It's one thing to have things on the [School] Act, and there's another reality with offering programs. And if you don't have the money, you have a choice. Either you get the money from the students to take the program, or you don't offer it. What choice is there (principal)?

Another principal placed the school's needs for funds to operate courses within a historical context.

The background was that up until about 1970, when the (New Democratic) Government came in, they eliminated all fees completely. So we had fees in here before and we eliminated them all at that time, -- and that was the situation for the next five or six years here, and then we started to run into difficulty meeting our needs in terms of some of the course areas. So consequently we went to the school board and established a set of fees (principal).

School budget limitations showed up particularly in three areas: technical studies, extracurricular activities and supplementary programs.

### Costly Programs and Activities

The high costs of consumables in technical and industrial areas were cited regularly by principals as being of critical importance to school budgets. A large percentage of students in

rural high schools were in industrial and technical education programs which were more expensive to operate than traditional academic programs. One principal estimated that a third of the total costs of running the school went to the technical studies department.

Rural districts were hit harder by transportation costs for field activities than urban or suburban ones. Vice-principal of a school in one rural district indicated that the school's biggest budget challenge for 1991/92 was in the extracurricular sports program area where transportation costs increased expenses dramatically. Students at the school currently paid a charge each time they boarded a bus to attend a game. Funds for extracurricular sports were cut by half from \$12,000 in 1990/91 to \$6,000 in the following year. Funding for basketball, volleyball and other team sports occurred via student payments and fundraisers.

In the other rural district the school principal reported requests were made by teachers in the 1991-92 academic year totalling approximately \$27,900 to cover the costs of transportation for field trips. He admitted that his school budget was short of that total by about \$23,000. Field trips were a common feature of students' education at that school. They included the following types of planned field experiences.

Business education, science and technical studies students went to Highland Valley; BCIT students went to Vancouver; forestry students went to a demonstration forest; BCIT students went to Okanagan College in Kelowna; our drama group went to the Sagebrush Theater; the science group went to Iron Mountain twice, the science group went to Woodby Canyon; the science group went to Princeton. We sent a group down to Physics Olympics at UBC. We sent another group to a Math contest in Kamloops. We sent a group called "women and Maths" to Kamloops. We had P.E. 12 go out skiing. We sent an art group just out local here. We sent another art group to Vancouver. We sent a graphics group, the English juniors and seniors, to see plays in Kamloops. The outdoor forestry and agricultural groups had to go out for a week on a camp-out. We sent a music trip to North of Edmonton, and another music trip is going to Prince George. And when you figure out that somebody has to go along on it as well, a substitute is required so the costs increase (principal).

Other principals illustrated the lack of sufficient funds by indicating that prior to the

financial restraint period of the mid 1980's, there were transportation budgets for athletics and physical education field trips. At present these items were funded solely by the students who participated.

In one district, four principals reported that district cutbacks would lead to the elimination of subsidies for summer school in 1991-92. According to one principal, the schools had no money to help students in need of assistance for summer school programs.

There is no subsidy for summer school. Either the child pays, or they go without. This is the first year that has ever occurred. We have always been able to subsidize it in the past, but we can't this year (principal).

Removal of those funds had implications for students from low income areas of urban districts who needed summer school courses. Generally, suburban districts and schools with fewer concentrations of low income households faced similar cutbacks but were likely to be less affected as levels of subsidization for summer school were usually lower than in urban districts.

Correspondence education became a contentious issue between the Ministry of Education and school administrators during the 1991-92 school year. In two suburban schools, the administrators stressed the inadequacy of their school budgets to pay for correspondence courses. Their school boards had usually paid the \$50 fee for students who needed certain courses and who obtained the principal's approval. However, at a cost of \$250 per course proposed for 1992-1993 one school principal explained that it would no longer be viable to continue that practice. Many principals were unsure what would be the practice in the area of correspondence courses as the changes were new and were still being reviewed.

### Budgets Under Strain

In one large, urban school the principal spoke about the shortage of funds over the years for summer school, correspondence courses, field trips and clerical staff. Generally, within the

recent past that school's operating budgets had suffered reductions.

In fact last year they cut the operating budgets by 10%, and they've just cut it by another 3% because of all this shortfall and so on that they've got now. So it's a reflection of where the Board's priorities are.... We've been reduced this 10% plus you've got inflation built in there so we are affecting the operating budget probably by 15% less than we had to play with last year (principal).

In addition to budget cutbacks, the district in which the school was located had been badly affected by the annual percentage increases for inflation given by government. On average, those increases were said to be lower than for many other districts.

In the same district another principal indicated how the operating budget of the school strained to fund school programs.

Kids don't want to make a bread board anymore, they want to make a water bed or an elaborate clock or coffee table, and something they can take home and be proud of. And we can supply only so much wood and so on. The budgets are not adequate. In the science lab, we don't have specific fees there, but just to give you an example of how the budget is not adequate, every grade 12 student is supposed to study the fetal pig and if they each had one fetal pig, then the entire science budget would be gone. They wouldn't have any chemicals or any of the hundreds of other things you need. The fetal pig budget alone breaks the bank (principal).

This school principal thought that the biggest factor that hurt the district's budget in 1991-1992 was the rich teacher contracts that had been awarded. His colleague in another school in the same district made a link between budget cuts and charging student fees.

It's a public school, you're supposed to come and you take the courses and it's paid for but of course the reality of the situation is that as budget tighten up or disappear teachers increasingly look at other ways to raise money and one of the ways to raise money particularly is fees.

Without going into the specifics of school budgeting processes, many school principals illustrated the difficulties and frustrations they experienced in matching money to school

educational programs and activities. They cited differences in levels of funding among districts by the province, students' educational needs, teacher contracts and budget reductions as factors contributing to the problems.

In summary, school budget shortfall demonstrated itself in two ways according to the accounts of education officials: the inability of schools to fund given programs and activities, and the general recognition that budgets were already stretched beyond their capacity. Technical studies, extracurricular activities and supplementary programs were costly programs to operate for a school. As well, rural schools in particular tended to have higher proportions of students in technical education and usually faced higher transportation costs. Summer school operation and increasing correspondence education costs could not be carried by existing school funds. The limitations of school budgets were linked to government reductions and inflation, qualitative changes in students' educational needs and generous teacher contracts.

#### Efficiency: Neutrality

The unfavorable effects of levying fees should not cancel out the good effects of services, programs, events or materials the fees supported or lead to other damages of students' (or their parents') choices. Examples of harmful effects would be consuming valuable human talent in fee appeals and litigation and distorting student and their families choices and consumption patterns of education. If students were unable to take courses for which they would gain credit towards graduation because of the fees attached then that would be an unfavorable effect of fees. Neutrality as an aspect of efficiency is examined under the subtopics: values, costs and program enrichment, inability to pay and student costs and social and political realities.

### Values, Costs and Programs Enrichment

Educational policy concerns in British Columbia dictate that students be provided an educational program "free of charge". Optional programs, or materials might be provided if possible by the school or if necessary by the students via fees. Removal of all fees would likely result in curtailing some programs and activities. Educators identified several positive outcomes from student fees. Student fees facilitated program delivery in the absence of new district money. That effect applied particularly to the types of fees classified as incidental and extracurricular. Across districts, student council fees assisted student governments in operating and enhancing the social environment of schools. Student agenda books, yearbooks and athletic fees provided students with concrete possessions that facilitated efficient planning, supplied students with memorabilia and helped schools run relatively efficiently.

Several superintendents, principals and teachers suggested that fees produced positive attitudinal benefits. However, they did not always agree on the first priority of a given fee such as the textbook deposit. One principal in a small rural school suggested that in addition to recovering the costs for textbooks, the deposit taught students responsibility. Principals in a large urban district did not support that position. Where deposits or fines were collected those four principals agreed that the main aim was to help reduce the considerable costs most schools suffered from damaged and lost textbooks.

A popular theme was that fees could work as an incentive to spur students motivation.

I think that there is an accountability thing. In the correspondence courses we do restrict people from the point of view of saying we will charge you \$50 to take this course and you're not going to get it back until you do. It might be an incentive to get them to do something. A child has got to build a table, and he says "you're going to have to buy the wood for this table, it's \$30". It's less

likely the child will say when he gets started "Ah this table is really ticking me off!" throws it in the garbage. But he paid \$30 for the wood, "let's get the table finished" (superintendent).

School principals, like superintendents, gave mixed responses to the question of whether school levies helped to improve students attitudes or inclinations. For those who argued that there was no favorable impact typically the small fee amounts were noted.

I don't think it (charging students) has a really significant impact. I mean the fees are not that much that it really has a great impact.... To pay \$10 for an art course, I'm not sure that there is any great lesson to be learned from that, if it makes the course any more meaningful to them because they have paid that \$10 (principal).

The same principal stated that students who took summer school were often required to pay themselves by their parents and that was an incentive for them to complete summer courses successfully. The summer school fee was relatively high in comparison to other school fees. Another principal in the same district was strongly against the idea that values of respect, care, and responsibility could be taught by imposing fees.

If somebody is saying on high or on low that or whatever that there is a value of charging kids for fees when they are 16 years old, I'm going to suggest to you every so subtly, that if they don't know that by the time they are 16, we ain't going to teach them. That just is not reality. That is something one would hope is taught in the home, in the family (principal).

However, most principals supported the idea that if students "were financially involved" they valued materials or programs more.

I think it is the "ownership concept". I think that there is still a Protestant Ethic out there in the land that says if you work hard for something, you value it. I know we don't have a whole set of Protestants in the country, but I think that ethic is still floating around (principal)

Attitudinal or non-material benefits were thought to accrue from paying a flat rate workshop fee.

It's kind of like a user fee system, isn't it? I think when there is a small fee paid, they appreciate what it is there are doing and getting more than when it is all given to them (technical studies teacher).

Generally other teachers supported this view. That position was strongly rejected by another technical studies teacher in the same district. He thought that charging a flat workshop fee was tantamount to charging an attendance fee. In his view, there was a difference between charging a fee for a service (a workshop fee) and charging a fee for materials (project fees) and the first kind of fee was indefensible. A similar position was taken by a technical studies teacher at one suburban school.

Cost recovery was an important goal for schools operating within lean budgets. In addition to the fee deposit practices noted earlier, three of the five districts included in this thematic analysis referred to fines for textbooks in their fee policies. Those policies linked fines to recovery of costs for lost or damaged textbooks. Athletics fees often supplied students with uniforms, athletic equipment, and referee services. A school (service) fee where applied covered costs of communication with parents and provided other materials or services beneficial to the general school body.

Cost recovery concerns were particularly apparent in connection with the operation of the summer school and the international education programs in the larger districts. With respect to summer school, one district superintendent explained:

In summer school we charge basically a recovery of the costs. And it is about \$100 per student for four weeks and that would be 3 hours a day, which enables us to pay our teachers. It's not a money making proposition though we try to stay on the positive side rather than have a loss.

He further explained why summer school operation had to be self-sustaining.

Well it's because it's not funded by the ministry. The ministry gives us money to operate the school system, K-12, the regular school program. Summer school

is outside of the regular school program, therefore the only way we can operate it is by fees. The board cannot spend money beyond it's mandate and it's mandate is the K-12 program. And in fact, quite a few of the other districts do not offer summer school programs at all (superintendent).

District policies on international education were diverse and subject to rapid change. The larger a district was the more likely it was to use an international education program as a source of revenues. The superintendent of an urban district indicated that:

[E]very district can charge them [offshore students] whatever they want. We are charging them what we think fair cost is. We are not trying to make money out of it.

He reported that his district office did not actively recruit offshore students but it "responded to inquiries" and "only accepted students on the basis of demonstrated English Language competency". It was thought that the district did not have resources to devote to such a program and had not calculated the costs of delivering English as a second language to international students. Some months later the same district official indicated that his district had changed its policy and was trying to attract more foreign students.

School principals supported the stance of district administrators that fees helped to cover costs to fund student operated activities, student projects in electives, and extracurricular activities. The overriding attitude can be summed up in a statement by the principal of a small high school:

Our fees aren't exorbitant .... I mean, they are only \$10 or \$15 , or something like that for a year or so. So they are not high, and yet they certainly help out as far as our costs are concerned."

Another theme related to the beneficial effects of fees was constructed around the notions of program "flexibility", "choice", "enrichment" and "enhancement". More money for departmental budgets through fees helped teachers to offer more "stimulating", "interesting", and

"exciting" programs to meet students' needs. Subject teachers supported the general perception of principals that fees could be used to make courses more interesting and thus attract more students. That was especially true for physical education instructors. In that subject, the argument for course fees took the following line. A course fee presented students with the opportunity to do more in the way of community recreational sports. Students generally enjoyed those recreational sports and were often able to obtain cheap group rates. Because a few students may be unable to pay the fees that did not mean the curriculum should be restricted to a traditional program and an elimination of fees. Parents and students from high income areas liked recreational sports, were willing and able to pay for them and therefore should be allowed to that.

Some fees were thought to be necessary in order to attract students to programs. This seemed to be particularly true in large urban schools. One principal saw fees as a way for some courses to survive.

Sometimes you do this to attract more people to your program. It's survival. Especially at that (senior grade) level (principal).

Another school administrator emphasized that fees provided materials students needed for practical programs.

They'll leave programs that are boring, is the word. And some of these courses are hands on courses where the fees are charged. And if you haven't got something of interest to put their hands on, and work with then they would probably elect other courses (principal).

In technical studies the argument for project fees centred on the experimentation senior students required as they advanced in their technical programs.

That [the basic program] occurs in grade 8, but I would be opposed to it in the

upper end of school, because I think it is part of the whole technology nowadays. Experimentation is the fact of going on to things rather than the mundane, and gone are the days where we should be just sort of teaching them the basic joints and construction. They should be doing exploratory work, and that involves all sorts of weird things. And there again we are trying to encourage a person's interest, rather than keeping them all locked together in a safe (technical studies instructor).

This instructor reported that a major flaw in the operation of his department was that students who are directed to his program were generally "of a non-academic nature".

Two teachers in technical studies mentioned that school workshops benefitted from charging students fees to purchase equipment and supplies. One said,

Well from the shop's point of view and the school's point of view, it provides a small cushion of discretionary funds and allows us to stay on top equipment-wise, and reference-wise, buying books, and manuals and things. And it also helps us to have available to the kids a greater array of tools and/or equipment. And probably from the student's perspective, I would imagine that it probably gives them more a sense of being a part of it (technical studies teacher).

The theme of program enhancement in the form of specialized activities was well illustrated by one school counsellor. He observed that paying a sizeable school fee could result in extensive and enriching field experiences for students.

And for the mini-school there are some other costs because of the enrichment part of the program. They do four major trips per year and the fees for those trips come to around \$500. So students would be expected to pay the costs to cover those trips. One trip is to Strathcona Park over on Vancouver Island, which is an outdoor training kind of facility. Another one is they go up to Blackcomb Mountain and do cross-country skiing and various activities. The whole mini-school goes on various trips in June. Some are going bicycling down the Oregon Coast, they do sailing trips, they do the Oregon Shakespeare festival... Plus other trips in the program too. They do a lot of field trips (school counsellor).

Potential Student Effects

School personnel identified a number of potentially negative effects of school fees. The major unfortunate student effects of having fees included: differentially higher costs to students in electives; inability-to-pay even "nominal" or "minimal" charges by some students; reduced participation in areas with fees attached; and potential embarrassment for students unable to pay fees. Other effects mentioned were the economic impact on school district budgets and bookkeeping problems associated with fees and deposits.

Principals who acknowledged that differential fee effects occurred because of how school curricula were organized used notions of "optional" activities; "extras in electives"; "athletic and extracurricular activities"; and "core curricular or academic programs" versus "technical or vocational" studies. One principal of a small school supported the idea that students in the "purely academic program" paid less towards materials than students "more into vocational things". In a large school in an urban district the principal thought a differential effect was exerted on students in career preparation courses.

The kids have a pretty good idea before the fact, that if they want to pursue the career preparation electronics program, and become involved in sophisticated projects, that that's going to be a more expensive choice than taking physics or chemistry. Now I can't tell you how many kids who might be interested in a career of prep electronics choose not to take it because of those fees.

Another group of students singled out by that principal as clearly experiencing "more expenses in terms of school fees" was grade 12 students. As well, students involved in extracurricular activities paid higher costs than other groups of students. Team success and ambition influenced athletics costs.

[The fees] that get people's dander up a little bit are the fees that get really

expensive. And that usually involves athletics. It depends on how successful the team is and how ambitious it is, and so on. Others [fees] are all small time.

For school level officials even when the differential fee effect was perceived to exist the link between fees and reduced student participation was not always acknowledged. It was thought that the high participating student tended to be the one facing the highest costs.

Well, if for example, let's say a child participated in athletics, they were building a chest of drawers in I.E., they went on a trip to Disneyland with the band, they had three post-grad parties in the spring. You know, it is not hard to run up \$500. Whereas another child, you see, may not participate in any of those. They are just not taking those courses, they are not musically inclined. You could actually get through the school course without paying any money at all (principal).

Technical studies teachers were among the strongest opponents to school fees in their areas on the basis of inability-to-pay. Because of the high freight costs for materials experienced by one school, technical students were thought to experience higher costs than other students in the core curriculum. The recognition that some students were unable-to-pay was noted by a home economics instructor in an urban district. Some students in her school elected not to take clothing and textiles because of the direct costs to them.

Requiring students to pay fees to attend summer school increased the chances of certain poor and often immigrant students being unable to attend due to lack of money. One way of viewing summer school would be to see it as a necessary input for the success of students with special language and other needs rather than simply as an extra program.

A theme related to inability-to-pay was that of reduced participation. According to one superintendent, fees discriminated between rich and poor students even though students might possess similar attitudes, talents and sincerity. With specific reference to music the superintendent indicated that costs could affect a student's participation in that subject.

I also think that instrumental music is an interesting example because quite simply

for economic reasons the opportunity to be in Band is limited by your economic status. So that if you're poor up to a point you are more or less denied that opportunity.

Student participation in extended field trips was affected by fees in all districts. This effect was lessened somewhat by school fundraising or district funds. Levying fees for correspondence education within the context of a five-fold increase over a three year period (from \$50 to \$250) posed potentially undesirable effects for students, schools, and small rural districts. As well, a brief by one superintendent it was reported that some regional correspondence schools had already noted a significant reduction in the number of course registrations by in-school students.

Only in one district did the superintendent view fee charges to students for field trips as producing possible unfavorable effects on students' education. Reduced participation in extracurricular sports and activities as a result of direct costs to students was generally not perceived as problematic because those activities were optional or students were eligible for some financial assistance.

From the point of view of a few teachers, one of the disadvantages of fees was that students' choices were influenced in certain directions.

I think most people look upon (fee charging) as being something very unfortunate that we have to do that. And (fee charging) is particularly unfortunate in the electives areas, because it can influence a student's choice of the type of education, you know, the route in which he is going (technical studies teacher).

Certain students, in the minority, were perceived to be particularly badly affected by their reduced participation in given programs. The following comments illustrate three examples of the value of summer school as identified by a counsellor at one urban school. In the first example students who spoke English as a second language needed the extra tuition in English to advance to a more academic program.

If students come as new immigrant students they come to a high school here.

When they reach the grade 11 level, they are not really ready yet to go into the academic grade 11 English.... We have them do the communications course which is a non-academic course, and a composition course, for writing. We then have them go to summer school for the grade 11 English course....and then we have them do the grade 12, and do another composition course as well.... So those students, they almost need that method to succeed. Otherwise you would in the traditional sense, channel them into a non-academic stream and keep them there.

In the second example students used summer school to meet grade level promotion.

At this school we offer a lot of transitional courses for students who are low in language levels.... Now if they don't have a chance of making that course up at summer school that could impede their whole progress in life as well. It could prevent a graduation. It could prevent marks from being high enough to enter trade school, or BCIT. or such.

In the third example students attended summer school to develop their abilities in particular areas.

Let's look at the flip side of that English class where you are having 60% or 70% of those students with English as a second language. Quite necessarily the teacher is going to be concentrating on basic writing, not creative writing. And if you have a first language student in there, he or she might necessarily be bored during that entire class, and really benefit from something like a course in creative writing in summer school. Or the second language student who has had trouble communicating orally may benefit from an oral course, like a public speaking course at Humber.

The data revealed that for the year under review no way was found to waive summer school fees based on exigency.

Another unifying topic in the school fees interviews was the embarrassment suffered by students in financial difficulty. Most superintendents agreed that charging fees could have unfavorable psychological effects on students who were identified as needy. One superintendent suggested that the fee structures were discriminatory and psychologically significant.

I think there is an imbalance in that the fees tend to be outside of that academic core that you were talking about, and that is discriminatory in my view. That

means that you can have what you need if you are in a science class or a history class, but you can't have it if you're in a cooking class or an art class. So I believe that that's psychologically significant because it sets up a class system and I think that's wrong.

Most principals also supported the idea that potentially unfavorable psychological effects occurred for students in financial difficulty faced with fees. They mentioned "loss of self-esteem", "injury to the pride" of students, and the "embarrassment" felt by students. The most passionate argument was made by principal of one school located in a socioeconomically mixed area of a large, urban district.

If we have fees and then we say okay I can't afford to pay but you can, I worry about what it does to kids' self worth, either to themselves or their family. No we shouldn't have to charge anybody anything except for extras. I think you can genuinely ask for some money for some things but the disadvantage is if the kid can't pay what are you saying to the kid. You're less than somebody else? Your family is less than somebody else? It's tough on them (principal).

Most principals thought that any negative psychological effect could be reduced by a good school climate, a small school, the openness of students; and a school policy favouring needy or "indigent" students. Discretion and sensitivity in dealing with financial difficulties of students greatly helped the situation. According to one, other psychological factors might impinge more acutely on student behavior than inability to pay a fee in school.

Now there are all kinds of things that one can make a psychological argument about, and this is one of them, certainly. But at the same time, what about the child who has lots of money, but is a poor student? Just doesn't have the ability. I mean, how do I eliminate the psychological damage that child is undergoing? Or the child who has lots of money and is a brilliant student but, socially can't interact? That's a real psychologically damaging thing, because they are at the time of their life when the social development is the most important thing (principal).

Two minor themes among the identified negative fee effects were administrative problems and the economic hardship created for small, rural districts. The cost recovery aim of textbook

deposits had to be weighed against the administrative problems they presented. One principal termed the deposit a "bookkeeping nightmare" because of the number of clerical time devoted to such a small sum of money.

The \$10 is paid one time and then you hold it for the student's career in the school. So a grade 8 comes in and pays the low \$10 fee, and then it's a bookkeeping nightmare. We keep it for them 4 or 5 years in the school (principal).

Another principal argued that the textbook deposit was meaningless in terms of deterring students from being careless with school texts but was time consuming to manage.

It's meaningless. It's bad because it just takes my accounts clerk hours and hours and hours and hours to provide refunds and to do the bookkeeping and it doesn't matter to this school. I would yearn for a return to the old days when schools simply ordered the books that they needed. We had kids that simply drop out and quit. They do it without telling us and we have no follow up. Books come in a very hap-hazard manner. It's not a deterrent at all (principal).

A procedure where students bought texts from the school and returned them for depreciated value at the end of their grade year would be much more effective and efficient in this principal's opinion.

Fee increases for correspondence courses were predicted to negatively impact on the budgets of small rural districts as well as on the correspondence schools. Reduction in enrollments would have consequences for the development of integrated student programs.

1. The budgets of northern districts, in particular, are adversely affected.
2. Schools whose budgets were prepared in anticipation of the continued availability of correspondence at nominal costs have had to re-examine those budgets, and reallocate additional resources; resources that were intended to provide other kinds of instructional support ....
4. Reduced registrations may well result in a slowing down of current Distance Learning Branch initiatives to improve correspondence offerings to the point where they are available, useful, additional instructional resources for schools.
5. The reduced registrations may well mean that some of the support services

currently available to students through the Regional Correspondence Schools may have to be dropped or drastically reduced.

6. Any reduction in demand for correspondence courses by schools puts further development of technologically supported distance education at risk in this province (Appendix H, A Brief).

In essence, it was predicted that increases in costs to districts (or reduction of funding to regional correspondence schools) would jeopardize many of current programs which integrated correspondence courses and regular education services.

The majority of principals did not discern any difficulties with homeroom teachers who assisted in the collection of registration fees, or with subject teachers. In the case of home room teachers, it was suggested that they were used to the "routine" of fee collection and had "learned to cope with problems" that arose. In the case of subject teachers, it was thought that they recognized the importance of fees for their programs. A technical studies teacher summed up the disadvantages of charging fees in the following way:

I guess to a certain extent the extra effort in the collecting and keeping records, and that sort of hassle becomes one of the negatives. The other possible negative I guess would be the difficulty with some people who haven't paid, and I'm not really worried about that. There might be some politically motivated negatives like government not wanting us to charge because that implies that they are not paying enough money.

#### Social and Political Realities

The issue of fees in public education is politically charged. Statements by superintendents sometimes balanced straight economic considerations of equity, efficiency and administrative costs with existing political and social realities. Examples of social and political realities within which public schools operate include political

opposition by parents to fees in education, the pervasive notion of public education as being completely "free", legal mandates for the provision of educational programs by school boards, and legal limits on the types of punitive measures that may be administered for nonpayment of school fees.

Political considerations were perceived by one superintendent to play a key role in maintaining the current fee policy in his district. That district official believed that within recent years fees were reduced for political and legal reasons.

Where one time a fee was \$5, guys would go: "Ah what is \$5?" Now they (teachers) think before they raise it \$5 because they (school board) don't want if the parents do get upset, they could end up having to remove fees. If a parent made a big enough fuss the board may have to reverse its whole decision on fees so there is the political reality there too.

Another superintendent seemed to take a "politically correct" stance by stating that no school fees existed in his district's secondary schools. Where student costs were paid (for summer school, correspondence courses, extracurricular clubs and sports, and graduation) they were explained as student imposed costs resulting from choices students with special interests made. However, the superintendent was informed about the political processes that brought the new fee law into effect.

I think there was a decision in Victoria that was prompted by pressures from sources that I really am not totally familiar with. I think that there were parent pressures about fees that got to the Minister of Education.... But I think like most things it has its political agenda and I guess it's realistic agenda.... The political agenda is to provide a greater benefit for the people of the province. The realistic agenda is if you want to provide a program for the students, you want to make it the best program possible and you provide the necessary resources. If you don't have the necessary resources within your budget then you will impose fees to get those resources and then you can provide an improved program for the students (superintendent).

The notion that public education should be "free" is pervasive in society. In one district,

the school board operated with the philosophy that education was free for everyone. Past difficulties with fee compliance led to the cancelling of a school fee for cultural events. Also, because of the "vocal" nature of the community, past complaints about fees though localized have been given a good deal of publicity.

You'll get the odd complaint [about fees] but it's very, very localized. It'll be maybe one or two parents in the high school for the whole student population, and they'd play it over the air saying the fee for art supplies for Art 11 is too high. Now you've got the art teacher saying it is this because... and the parent saying I can buy it at a cheaper rate than you can.

Statements by one urban district official linked parental dissatisfaction with school fees to pressure on local politicians. Parents from wealthy areas of the district had complained that they were being regularly requested for money to support elaborate field trips. The reality of operating schools in a politically charged, large urban center was evident from the success of parents in effecting the policy change.

I know for sure they were letters sent in for people who were in [this district]. Yes, I mean we made aware that concerns had been expressed. We've had parents previously that came to us and expressed concern about field trips (superintendent).

Another superintendent raised the issue of politics and fee charging by linking the origins of the fee legislation to a number of wider social and political issues. Apart from the legal considerations, withholding report cards could sometimes be politically damaging for a school administration as it could lead to parental complaints to school district officials. Sometimes causing superintendents to request changes of school practices.

In one school, a principal noted that "a school trustee made such a big fuss about student government fees" that a regulation was passed making those fees non-compulsory. The same principal presented the most direct and plausible link between organized political forces and

student fees.

I think there is quite a movement from the Confederation of Parents to have the fees limited and so on. I am not sure if they got their way if they know what would really happen in the schools. They wouldn't be able to offer some of these programs.... They have the ear of some school trustees and some school boards and in some places they aren't as well received and haven't got their foot in the door in the same kind of way and the problem is that they don't always speak for the people they represent.... The Confederation of Parents ... don't always speak on behalf of all the parents. But I do know that the Confederation has got something cooking in terms of fees and they would like to see them restricted and removed (principal).

This principal admitted that although the fee issue was "out there" he "hadn't given a whole lot of thought to it". The schools in the district had been shielded by the central office authorities with respect to conflicting interests around the fee issue.

Another idea developed on the topic of the unfavorable social effects of fees was poor public relations with parents and students. One superintendent argued that parents were the ones penalized by school fees.

First of all, it's not the students that are paying, it's the parents. So we end up penalizing the parents and getting them annoyed at us because, you know, education is supposed to be free. I mean they are paying for it with their taxes and here we are telling them that they have to cough up at the beginning of the year another \$100 or \$200 for the books.... It just seems to me that given the amount that we are already spending on education, the little extra that it would cost for books or resource material, we'd be better off to pick up and avoid bad PR with the parents (superintendent).

Another one suggested that some students tended to developed negative attitudes towards school employees when reminded about fees.

From a public relations point of view they (fees) are very negative. Secondary kids are somewhat blase about this and if you're their teacher and you have to nag them, or if you're the vice-principal and you to chase them down and say "excuse me you owe us \$4.95" or "you owe us \$12.95" the money isn't worth it (superintendent).

As mentioned earlier, the practices of charging and enforcing the payment of school fees in public schools are legally stipulated. The history of school fees in British Columbia has not involved litigation. When principals resort to withholding report cards for fees they are thought to be engaged in an illegal action. Questionable but legal strategies that produce less political fallout are withholding timetables, graduation certificates, transcripts, transit bus passes, and school annuals. At the school level, principals are regularly reminded of how far they can go to enforce student payment of fees, fines or deposits. The legal framework regarding fees is established in the School Act but its meaning has never been tested in a court of law.

Briefly, the theme of efficiency was analyzed in this section under three headings: values and enrichment, potential student effects, and social and political realities. Educators were in disagreement about whether imposition of student fees taught values of responsibility, motivation, respect, care and valuation of property. Cost recovery was an important reason why students paid for items such as textbooks, athletic equipment, transportation, communication to parents, summer school, international education, student operated activities, projects and extracurricular activities. A recurring theme was that fee-money helped to enhance programs by providing more stimulating and interesting activities e.g., in technical studies, art, and physical education. Potentially negative effects of student fees included: differentially higher costs for students in electives and technical areas, inability to afford fees and subsequent feelings of embarrassment, reduced participation in fee-attached courses, negative economic impact on district budgets, and bookkeeping problems. Psychological problems related to inability-to-pay could be overcome by a good school climate, a small school, openness of students and a school policy favouring poor students. Educators recognized that some administrative costs and inefficiency were part of the fee administration processes. School fee policies and practices have been shaped by the current school law which was put into place in response to parental concerns

about school fees in public education. School authorities often balance concern for enforcing fee payments with legal, public relations and political considerations.

### Administrative Costs

Efficient administration of student fees required a number of resources and procedures. In schools attention was devoted to: 1) sufficiency of resources, 2) collecting, accounting and auditing procedures, 3) withholding practices, 4) operationalizing a proper and equitable fee structure and 5) student compliance.

### Sufficiency of Personnel

Among school administrators sufficient personnel and equipment was perceived to be a first priority for fee collection. Most schools made use of computers to generate computerized fee schedules, receipts, class lists of outstanding fees, and to store and manage accounts. In one of the wealthiest schools in the study the system of accounting was not computerized at all because of the school business assistant was nearing retirement. Another school in a small district was also not computerized. Secondary schools authorities usually employed a full-time business assistant and other secretarial or clerical personnel to cope with their finances and administration. The initial collection of fees required teachers as well as office staff for either arena or homeroom collection.

Inadequate numbers of office staff presented basic problems for the centralized fee

administration within a large school.

The biggest problem is getting the accounting time. I have one accounts clerk who does both our public and non-public accounts. We should have one and a half people doing that. There's not enough time in the day. There are hundreds and hundreds of transactions which she does, everything from hot dog sales... We run all our money through the accounts clerk. The biggest problem from an administrative point of view is that I don't have the support staff that are really needed to do the job (principal).

The reason given for lack of sufficient accounting staff was that more office staff was not considered to be a high priority of the school board. In contrast, a principal indicated how smoothly and efficiently the system of fee payment operated at his school because that school had adequate numbers of office personnel.

We have a full-time business assistant at the school. She produces a printout with each student's name on it and at the beginning of year in September we would ask that the homeroom teacher collect the fees and then bring them directly down to our business assistant. Our business assistant has all of the classes organized and she will just check the student off as they pay. I think she has it all computerized now so she pretty well has it all organized. After the first week, the business assistant takes the students directly. So those students who were unable to pay in the first week and want to try and pay will come directly to the office and pay the business assistant who will issue a receipt to them at that time (principal).

The key to effectiveness in all administration processes appeared to be appropriate deployment of staff.

### Collecting, Accounting and Auditing Procedures

With respect to collecting, accounting and auditing procedures, all schools operated centralized accounting systems of school based budgets often with the assistance of teachers. Principals agreed that the smooth operation of school fee administration required a simple, fool-

proof system.

Well, it (effective collection) varies, but as long as your information is good at the beginning and your printout is good and you have a simple somewhat fool-proof system of collection then we end up with very few problems (principal).

depending on the location and wealth of the school, teachers needed to be reminded about the security concerns related to fee money.

Sometimes they (teachers) don't do it very well.... You know we have to make it absolutely simple and fool-proof and remind the teachers every year, do not give the money to kids to bring to the office. Do it yourself. Don't leave it in your room, because people steal it before you turn around (principal).

In one small school, all of the collected fee money except that for student projects and replacement of school textbooks were collected and submitted to the school board which then performed the budget allocations from school district money, fee money, and other revenues. At most other schools, the school office staff performed those tasks.

Now the fees are collected and the money comes into the general pot kind of thing and then gets broken up into the various parts by our business assistant. So she is the one that actually says if I have \$1000 that percentage goes into the yearbook account, this percentage into the agenda book account, this percentage goes into athletics, lockers and so on (principal).

According to one principal, centralized collection and accounting for fees and other small sums of money kept the business assistant very busy.

Yes, she's extremely busy with those little details. And it's often minuscule amounts. All these little things like the little slip for the coffee for a meeting, and you know, like it's crazy. And a person like that spends a lot of time with all those little amounts, yeah (principal).

In a small school in another district the principal admitted that the office accountant was kept busy with school accounts and receipts of money from students but that she managed very well.

In contrast, one principal in a large urban school described how centralization of accounts could

produce major problems.

Now I insist that everything goes through the accounts clerk. So we have a hotdog sale today, she gets all that money and she has to count it, and you know the record keeping on that and teams going to tournaments, and island championships, and provincial championships and all the receipting that's coming in from hotel bills and transportation and all that sort of stuff. She sells pins out of there, you know, kids bugging her every ten minutes. So it's a crazy job. Most people don't realize that the number of transactions are just monumental. We must have 40 clubs in the school, they are all doing something. Plus all the teachers who are doing their ordering, all their supplies, their chemicals, their equipment. So it just goes on and on (principal).

Collection of costs for field trips and athletics were not often initially handled by sponsor teachers. At one school, the principal indicated that there were some problems with field trips planning since teachers had to act as teachers as well as accountants. Teachers at that school were said to resent the "administrivia which gets in the way of teaching". At another secondary school, the principal admitted that the administration of fees in her subject consumed a good deal of time.

Yes, it is a hassle. It's a hassle getting money for any kind of thing. Frequently the kids don't have it so you have to hand them notes. And you have to record it, you have to write it down, and you have to add it up. You have to spend a lot of time. I even have a secretary in my area in French and she does a lot of that work for me. She does all the French budget stuff and that's a whole thing on it's own.

All schools were informally and formally audited. School level administrators did informal, regular audits of non-public accounts. More formal annual audits were performed by school boards which, in some cases, were responsible for keeping school based accounts. One principal explained how the system of evaluating accounts worked at his school.

The administrators in the school get a monthly accounting of the balance in the school based budgets as well as the school budget. I know the enrollment of the school is 1155 students in September and my business assistant has told me that virtually all the fees have been accounted for with the exception of 20 people.

I would be able to multiply fairly easily to find out what should be in the various accounts. The school district is audited on occasion and our business assistant provides the auditor with those records as well. That's a formal audit. Sometimes they (the school board) have involved outside accountants as well and of course the Ministry of Education comes with an audit occasionally to check. But that's mainly for attendance (principal).

### Withholding Strategies

School authorities carried out certain withholding practices to enforce payment of fees and fines for textbooks. Homeroom was in some ways easier than office collection but from the perspective of time enforcement homeroom consumed numerous teacher hours. Collection of charges for lost or damaged books were also considered time consuming and costly. One principal argued that students responded more effectively to withholding report cards for textbook charges than to any other strategy.

You weren't allowed to withhold a student report card if a student didn't pay his fees and didn't pay his textbook deposit and so on. And then one year I got fed up to the top with it and I said, "Fine. You don't get your textbooks in or pay for those textbooks, you don't get your report card". And before that if we had got \$200 in we figured we were lucky. We figured we had really done something. That one year, I think it was \$1500 or \$2000 in a year that we got, just like that and our problems the next year were much less. And then we did that for 2 years. One lady complained to the superintendent. I had to send out all the report cards, and we went -- whoosh -- all the way down again (principal).

Thus, withholding student reports for unpaid fines or fees can be politically troublesome. Other school level administrators stated that for some workshop courses if students "don't pay the fee, they don't get the course."

In most schools a combination of a "soft" approach (verbal persuasion, phone calls and

letters to parents) and a "hard" approach (disallowing involvement in practicals, withholding student reports, transcripts, etc.) was employed. This was true of one large school in an urban district.

One of the favorite techniques here is to withhold (report cards and other information) in June when we want all debts to be settled. I mean, if you are coming back in September, try and get your timetable if you haven't settled your debts. Try and get your transcripts. There are administrative ways of lowering the boom. But we want to talk to the people first, and say, "Well what's the problem? Have you got a financial problem? Our finance company is open. Give us a reasonable projection of how you can handle this". So you talk first. Then we get mean -- I guess you would call it mean -- and we start to lower the boom by withholding things that are sometimes taken for granted (principal).

Some school principals reported that they did not withhold any items from students to force payment. Inevitably, some student debts had to be forgiven at the beginning of each school year.

### Operationalizing an Equitable Fee Structure

Operationalizing an equitable fee structure demanded that school authorities be attentive to the total amount of fees students paid particularly in curricular areas. The need for fee revenues had to be balanced against the often competing principles of student equity, school efficiency, and administrative feasibility and student choice. A basic fee applied at a flat rate, such as a workshop fee, was more easily administered than fees that were tied to students' aspirations and the "size of their pockets". For reasons of privacy, schools are not allowed to perform means tests for students requiring financial assistance. In any case, such tests would consume administrative resources and might not provide net benefits to schools. All schools in

the study operated on the assumption that students could pay the required fees charged. In a few cases where students received subsidized bus passes or school lunches principals were able to assume that some financial assistance would be needed. The difficulty for school administrators was that it often was not apparent which students were experiencing financial difficulty.

When teachers and principals became aware of financial hardship fees were sometimes waived. For some schools a check with parents was required. One principal articulated a problem if too much emphasis was placed on the ability-to-pay aspect of equity by supplying fee waivers too readily.

I don't think the system can afford to do everything for everybody. So I guess we'll always have some fees of some sort. There are some things I think where fees should be charged. Hopefully, it might provide a little more value of the course for the students, or a little more understanding of the materials they are using because they have to pay something rather than just getting it (principal).

When homeroom teachers and subject teachers collected fees from students they were thought to be in good positions to identify students in financial need. Subject teachers, too, could often work out flexible payment arrangements with students, waive fees, or ask the school administration to absorb the costs.

The issue of equitable fees related to broad educational and social issues and was raised by one principal who agreed that the structure of the school curriculum could lead to students in technical programs paying more than students in traditionally academic programs.

Yes, I do because kids taking Chemistry 12 don't pay for that stuff whereas kids taking, say construction 12, pay for theirs. And if you are on a purely academic program and taking all the academic 12 courses, just say for example, into the teacher's budget goes the equipment and the stuff they use and so there is no difference. And the sort of socioeconomics of that are quite interesting. What kinds of kids are academic kids? What kinds of kids are say more into vocational things? And then looking at their socioeconomic background too you are maybe asking certain kinds of kids to pay more money (principal).

Among subject teachers, one in a rural school pointed out that social and economic issues were linked to the school and employment paths of the students who pursued technical and vocational subjects. Relatively few of his students went on to professions in technical areas. The majority of them were "nonacademic" and were merely concerned with working with their "dad or uncle out in the bush".

Another principal described special district needs which could be addressed by budget allocations.

And in this particular school district we have the largest number of ESL students, the largest number of disadvantaged students, special education, the handicapped, the hearing impaired, because of the medical facilities, and the largest number of immigrants, and so on and on and on it goes. In this building more than 80% of the kids speak English as a second language (principal).

The same principal revealed that a school board study identified his school as one of the neediest in the district. As such, the school had special needs.

And they [school board] judged by income levels, number of parents on welfare, social assistance, number of families that used public medical and dental facilities and the kind of accommodation people live in, subsidized, low rent, whatever and they said that the most needy school is at (another school) followed by this school (principal).

Many comments made by School District people appear to be of defensive nature. This was an unexpected finding of the study. It illustrates that the bias of School district personnel leans towards minimalization of school fees and that fees in public schools is not fully regarded as a legitimate educational issue.

### Student Compliance

Student compliance was easier to achieve during the first week of school when all that was required of students was to make a cheque or cash payment during homeroom period or during arena scheduling. Arena schedules required students to stand in queues. Much intensity of effort was required initially to prevent waste of administrative time and effort later on in order to follow up outstanding fees. When students did not pay incidental fees to the school office during registration week an anonymous factor began to operate. Students were often reminded about those payments by the school secretary, business assistant, or vice-principal rather than by their homeroom or subject teachers. It was often easier for them to avoid administrative personnel than their teachers. Students could also avoid embarrassment more easily this way as well. Fee payments were complicated by the fact that a small percentage of students delayed payment for incidental and curricular fees for various reasons. If students were required to pay curricular fees before they attended the first class, then reimbursements were made upon withdrawal.

Subject teachers, particularly in physical education, often enforced compliance by applying peer pressure, identifying students, withholding marks, and postponing field trips. Technical studies teachers often withheld projects from students. Sometimes student recalcitrance was identified by teachers as an "attitudinal problem" or as an example of "rebellion against authority". Teachers had the advantage of familiarity with students in collecting curricular and extracurricular fees while the school administration could utilize certain registration procedures to optimize student compliance.

Costs attached to fee administration in schools were related to five sub-topics in this section: 1) sufficiency of personnel, 2) collecting, accounting and auditing procedures, 3)

withholding strategies, 4) operationalizing an equitable fee structure, and 5) student compliance. Inadequate staff resources presented major difficulties for fee administration in large schools with centralized accounting. Schools tended to centralize collecting, accounting and auditing procedures of school based accounts with the help of teachers and office staff. To minimize waste of time and effort, the fee information, collection and auditing needed to be simple and fool-proof. However, office staff were often kept busy with numerous transactions involving small sums of money. Informal, monthly audits were performed by school administrators while more formal, annual audits were conducted by school boards and the Ministry of Education. A combination of soft and hard approaches were employed to enforce student payment of fees with the most common hard strategies being the withholding of student items or activities. Operationalizing an equitable fee structure demanded paying attention to competing goals of equity, efficiency, administrative feasibility and student choice. Schools operated on the assumption that student could afford fees and then made special arrangements when financial difficulty was evident. However, broader social issues remained unaddressed such as differentially higher costs to technical students, the socioeconomic status of technical studies students, special needs students, and special needs districts. Student compliance was best achieved under conditions which made it convenient, easy and fast for students to pay fees during the designation registration period. After that period, and especially when students were required to pay fees to school administrators or office staff rather than to homeroom or subject teachers, student compliance was harder to obtain.

## Chapter 6

### GENERAL SUMMARY, CONCLUSIONS, AND IMPLICATIONS

Public school fee issues involve important matters of fiscal, administrative and social policy. In an era of economic recession, taxpayer resistance to higher levels of public spending, and budgetary restraint, schools are facing increasing difficulty to provide a broad range of educational services free of charge. The issue of school fees is therefore an important concern in the development of school finance and educational policy.

Governments in industrialized countries recognize the need to preserve free public education and equality of educational opportunity while simultaneously allowing parents some freedom to make private choices in schooling their children. These concerns are discussed in a government-sponsored report on the state of public education in British Columbia (British Columbia Royal Commission on Education, 1988). A conceptual framework using literature about privatization, principles of taxation, school fee law and practices, and the public/private sectors of education was formulated. The framework was then applied in examining why school fees exist in public education and how the administration of school fees affect the provision of education to students.

Employing a purposive sampling technique, seven school districts were selected in British Columbia, a province that has undergone considerable retrenchment in education in recent years. Selection criteria included district size, wealth, location and ethnic composition. Superintendent-rank personnel were asked to participate in the study or to designate a suitable substitute. A purposive sampling strategy was applied in selecting eighteen schools from twenty-nine secondary and senior secondary schools in the seven districts. Secondary schools deemed appropriate for inclusion were identified by both superintendents and the researcher. The aim

of the selection strategy was to ensure that schools of different size, wealth, location and ethnic composition were chosen. After initial selection, permission to conduct interviews was requested by letters mailed to school principals. Principal participants were included in the study based on their willingness to be interviewed and their key role in the implementation of a school fee policy. Finally, teacher selection used a reputational approach guided by the recommendations of school district personnel and preliminary examination of school documents and records. After interviews were conducted with school administrators, they were asked to name teachers who were knowledgeable about school fee implementation. Teachers and department heads were also asked to recommend their colleagues. As the data gathering continued, teachers were selectively chosen from programs with fees attached e.g., electives, extracurricular activities, and specialized programs.

The main source of data was interviews with education personnel at the three levels of the education system. The purposes of the interviews were to determine the current policies and practices on the levying of school fees and to explore the processes of collection and allocation of student fees at the school level. Three interview schedules were developed and used to elicit responses from school district officials, school administrators, and teachers. Interviews were conducted with employees in different districts and schools to discover how different were perceptions among school officials about school fees and their consequences. In the following sections findings are summarized, conclusions are drawn and then implications for research and policy are offered.

## Conclusions

This section compares the findings from the literature on a set of relevant items included in the conceptual framework with what the study showed (Table 13). Did the construct explain why and with what effects school fees policies and practices are applied in public schools? That is, were school fee policies and practices shaped by benefit and ability-to-pay equity, in the light of the available relevant evidence? What did the concepts from the literature on privatization, school fee law, and the private/public divisions in education contribute to our understanding of school fee practices and processes? In this section, the conclusions are linked to the framework and its constructs. The themes to be discussed are: values governing the finance of public education, policies and laws governing the finance of education, administrative effects of school fees, socio-educational impacts of fees, and external variables affecting school fees.

### Values Governing the Finance of Education

**Major Conclusion. The benefit principle and ability-to-pay principle are both used to justify school fees.**

Economic principles influencing student fee structures included the user benefit argument. Educators believed that consumables, take-home projects, extracurricular and special activities should be paid for by the individuals who benefitted from them. Educational policy and practices treat summer school as supplementary to the basic free education mandated by the School Act thus giving priority to the benefit principle. That rule was often applied when a minority of students required special services or items for which the school had no budget. For

ability-to-pay, administrators emphasized that although fees were required in certain areas no students were excluded because of financial need. District policy allowed for an appeals process through which students could contest a fee. Hardship cases were commonly addressed informally by school officials and district or school contingency funds were made available in order to waive charges, provide bursaries, or reimbursements. However, as practiced, this policy did not always hold for home economics, technical studies, physical education and summer school. In the case of summer school, no bursaries were available for the 1991 to 1992 school year. As is shown (Table 13), findings reported in the study generally agreed with the literature on the two principles.

Minor Conclusions. (1) Schools operate a limited user fee scheme but no evidence exists to suggest the privatization of the public school system (i.e., public education being moved from public to private provision).

The provincially mandated educational program remains largely free of fees and no evidence points to the introduction of new and substantial school fees. School administrators did not think that government was renegeing on its responsibility to public education, or devaluing public schools at the expense of private schools. No evidence was found in the study to support the notion of a broad movement to privatize education nor was it supported that under privatization social welfare is reduced. However, individual freedom of choice was thought to increase with fees.

(2) Equal education is not impeded by current levels of school fees.

The reality of administering education is that modest fees play a critical role in providing desired educational programs and activities. Fees seem to best accomplish delivery of some programs, activities and items in the absence of public funds. The greatest potential danger for unequal educational services is in specialized educational programs where substantial

Table 13: Comparison of Themes from the Literature and Findings Reported in the Study.

Theme	Consistency
<u>Values Governing the Finance of Education</u>	
1. Economic	
Broad economic role of government	not in study
Beneficiaries should pay	agree
Ability-to-pay affects fee policy	agree
2. Political-Social	
Four types of privatization identified	not in study
Delineation of privatization theories	not in study
Movement towards privatization of education	conflict
Privatization reduces social welfare	conflict
User fees impedes socialization	not in study
3. Public Policy Issues	
Parents pay more with fees	agree
Taxpayers pay less with fees	agree
Equal education impeded with fees	conflict
Negative psychological effects occur	agree
Positive feelings arise from contributing	not in study
<u>Policies &amp; Laws Governing the Finance of Education</u>	
1. Public & Private Aspects	
Public education provides free, equal, good quality, standardized schooling	agree
Public schools help social cohesion & inclusiveness	not in study
Fees enhance private choices in programs	agree
Tuition payments as part of public education	agree
2. Legal Factors	
State/Provincial law divides mandatory & non-mandatory educational programs	agree
Court decisions define free & equal education	conflict
School boards and traditional practices are factors in fee policies	not in literature

cont'd

Note for Column 2: agree = the results and the literature are in general agreement; conflict = the results and the literature generally disagree; not in the study = the data collected did not address this topic; not in literature = the data showed this result but it was not mentioned in the literature.

Table 13 cont'd.

Theme	Consistency
<u>Administrative Effects</u>	
1. Efficiency	
Fees reduce student choices	not in study
Fees create litigation & reduce work incentives	not in study
Fees recover costs and prevent wastage	agree
2. Feasibility	
Adequate administrative procedures needed	agree
Importance of staff pragmatism, type of school collection, and flexibility	not in literature
3. Yield and Elasticity	
Fees generate revenue	agree
Revenue increases as income increases	not in study
<u>Socio-Educational Impacts of Fees</u>	
1. Compliance	
Noncompliance & avoidance increase when costs increase	agree
Student rebelliousness affects collection	not in literature
2. Quality	
Fees maintain or improve program quality	agree
Fees allow choice, freedom & flexibility	agree
3. Burden	
Fees differentially burden students	agree
Lobbying & public relations are factors in fee removal	not in literature
4. Benefits	
Fees help school autonomy & entrepreneurialship	not in literature
Many good student values increase with fees	agree
<u>External Variables Affecting School Fees</u>	
1. District/School size, grade level, SES, & location are factors in fee levels	
	agree
2. Nature of political community affects fee policy implementation	
	not in literature
3. Ethnicity and gender affect fee levels	
	not in study

Note for Column 2: agree = the results and the literature are in general agreement; conflict = the results and the literature generally disagree; not in the study = the data collected did not address this topic; not in literature = the data showed this result but it was not mentioned in the literature.

sums of money are required to deliver sophisticated technical courses or enriched educational experiences. Thus, some fees are structured by the nature of the curriculum and traditional practices. It is possible that many students in technical-vocational programs run a higher than average risk of dropping out of school and live in low income households. School fees coupled with common school expenses may be a contributing factor in student drop out rates. As Table 13 shows for public policy issues, findings are in agreement with the literature that while parents pay more when fees are imposed taxpayers pays less. While the study did not support the view that parents develop positive feelings when contributing to their children's education, there was support for the argument from the literature that fees can have negative psychological impacts on students.

### Policies and Laws Governing the Finance of Education

**Major Conclusion. School policies and laws define the application of fees according to required and non-required curricula which means that fees are encountered mostly for additional activities and least for core subjects.**

Results for the public and private dimensions in education revealed that there is consensus among educators about the need for a free, core educational program. The principle of private benefits in public education is best illustrated by the high fees paid in supplementary and special, and extracurricular programs particularly for international education. However, the overriding attitude at all levels of the school hierarchy to fees was one of pragmatism. Fees are not applied from a philosophical stance (i.e., they inculcate intrinsic values) or from an ideological viewpoint (i.e., the market is preferred as a better mechanism than government in allocating

social goods and services). They are applied because historically school budgets have not covered certain programs and items which extend beyond the basic, core program. Because some school fees have been longstanding, students and parents accept student council fees, project costs and other charges outside the prescribed curriculum. Some consistency exists between findings in the study and the literature on the division of core and extracurricular programs and activities and fee charges. However, the study showed the importance of traditional practices and school board input on fee policies that was not reflected in the literature.

Minor Conclusion. Fee policies and practices operate largely within the framework of school law and have thus far have not been shaped by court decisions.

Although a widespread social presumption is held that education should be free of all charges, parents and students accept payment of fees in certain traditional areas. Equal educational opportunity is observed by district policies of assistance to students in financial need. However, at the level of practice, budget limitations and student embarrassment may influence the efficacy of that policy. The study's findings were inconsistent with the literature on the role of court rulings in defining free and equal education. The differences between the American and Canadian contexts may explain much of that divergence.

#### Administrative Effects of Fees

Major Conclusion. **By charging fees, schools are able to provide resources necessary for student programs and activities.**

A key reason for the existence of student fees was financial need or budgetary limitations. Student fees were a source of revenue to introduce, maintain or improve educational services and adequate staff was a key variable in administering fees. In relation to efficiency, findings revealed the prominence of economic choices, curricular choices, investment in education and administrative costs. Among the factors determining student fees were prevention of wastage, cost recovery, and provision of interesting projects and activities. The study was unable to confirm whether fees were economically neutral in impact. Although fees had not produced any litigation, it could not be determined whether they impacted on work incentives as suggested in the literature. Consistency was established on the notion that fees help to recover costs and prevent wastage.

Minor Conclusions. (1) Some negatives effects are associated with fees particularly for students in low income families.

Administrators were uncertain of the impact fees produced on participation and the differential costs imposed. Those costs caused by the structure of the curriculum for career preparation and course electives were potentially the most inefficient in terms of affecting students' choices and investment. This study confirmed findings in the literature that students from low-income families may be negatively affected by fees and that school administrators are not always aware of disadvantaged students.

(2) Greater complexity of school fees policies to meet equity requirements are unnecessary.

Varying degrees of administrative efficiency were revealed by routine school fee processes. Greater complexity of policies has to be balanced against privacy and time consumption. School administrators regarded centralization of accounts as the best way to administer fees assisted by teachers. All schools incurred some excess administrative costs in

collecting, accounting and applying fees. The time and effort required for fee administration was reduced by facilitating early intense fee collection at the beginning of a school year or semester. There was agreement between findings of the study and the literature on how well adequate administrative procedures assisted administrative efficiency. Unlike the study's findings, the literature did not show staff pragmatism, the type of school collection used, and flexibility in payment schedules as important factors in fee administration.

### Socio-Educational Impacts of Fees

**Major Conclusion. Charging fees negatively impacts on student participation and psychology.**

The potential burden of school fees for parents and students was an important concern for educators. Increased costs to parents and reduction of student participation were acknowledged potential effects. In addition, when unable to pay fees, some negative psychological impact was thought to be experienced by students. Findings from the study confirmed those from the literature that fees differentially burden students according to family income and curriculum structures.

**Minor Conclusions.** (1) Better student compliance is achieved by reducing the time and effort students need to comply.

Where students avoided payment some withholding strategies appeared to be relatively effective. Educators disagreed about whether fees helped to improve the quality of education. This conclusion was consistent with principles derived from the theory on taxation.

(2) Poor public relations develop between school authorities on the one hand and a small percentage of parents and students on the other when fees are charged.

Most of the principals stated that unavailability of any fees would mean curtailing or removing certain activities or items from students. Yet they revealed that the popular user benefit rationale could be compromised in the face of political opposition from parents. Good public relations with parents and students had to be balanced against benefit equity especially when school districts or schools increased or introduced new fees. The reviewed literature did not address this finding.

#### External Variables Affecting School Fees

Minor Conclusions. (1) Large, urban, wealthy districts have more items for which fees were charged (e.g., non-traditional physical education programs, summer school and international programs).

All district personnel showed keen awareness of pockets of low-income households in their districts but concern was greatest in large urban districts. Urban districts sought to present a coherent, formalized district policy particularly in the face of local parental opposition. The location category of school districts helped to highlight how much more sensitive issues of poverty and politics are within urbanized as opposed to rural environments. This conclusion supports findings from the literature on fees that large, wealthy, urban districts and/or schools tend to have higher fee structures.

(2) Fees are higher in the senior grades than in the junior grades.

Educators indicated that costs increased for schools as students selected program electives requiring expensive materials and costs incurred by schools in these areas are passed on to students. This conclusion is consistent with the literature on school fees in that seniors experience considerably more expenses for curricular and incidental expenses than juniors. This difference is due to different levels of participation and the type of fees and mix of courses offered at different grades.

(3) No relationship was established between fees and ethnicity.

Fewer data were provided about ethnicity by educators than about socioeconomics and school fees. The question of ethnicity and fees was related to the percentages of students of given ethnic backgrounds taking vocational-technical programs. The assumption was that those students would pay differentially higher fees not because of their ethnicity but because of the structure of the curriculum and fee-attached courses. The theoretical literature suggested links between given ethnic groups and poor school achievement. Enough data were not gathered to draw conclusions.

### Significance of the Research

A study is judged to be significant if it contributes to or extends existing knowledge of a particular subject. This study does so in several ways. In general, the conceptual framework created for this dissertation holds potential for fruitful investigations into school finance and educational policy at a time when educators, policy makers, and economists strongly debate the financing and administration of public goods and services in the context of economic recession. Furthermore, privatization initiatives undertaken by Western governments within the last two

decades have served to heighten the discussion about government's role in the provision and supply of social services.

First, the Musgraves' theories about taxation provided a systematic, comprehensive way of examining the factors determining why and how school fees are imposed and administered, and the influencing values. When the principles of taxation are used consistently, their usefulness can be assessed. Benefit and ability-to-pay equity were highly valuable in explaining why and where school fees are imposed. The principle of feasibility also provided a good way of organizing and understanding use of resources, enforcement procedures, the complexity of fee schedules and the level of centralization utilized by schools in fee administration. However, compliance, efficiency and burden proved to be of limited value. While ways of improving student compliance were evident, costs such as avoidance and underproduction associated with compliance remained uncovered. Questions about the burden caused by increased fees remained unanswered to some degree. Educators could only speculate that increased fees would be a burden to students and parents, pose problems of full participation and produce negative psychological impacts. Of equal importance are those concepts from public finance theory that were not helpful in explaining questions posed about school fees. For example, yield and elasticity of taxes did not explain any of the administrative effects of fees.

Second, concepts from educational research and case law on school fees, and the debate on public and private education sectors were advanced to understand values, policies and laws that govern the finance of public education. This conceptual arrangement extends the theoretical and empirical work of others (Kendall, 1984; Kirkman, 1982; Bulthaus, 1988; Bergen, 1982, 1886, 1989) by treating two strands of thought -- arguments about public and private education and financial and legal studies of fees -- as complementary perspectives. Insights into the factors impinging on the administrative actions about imposing and administering fees and the processes

underlying those actions that extend beyond those provided by analyses utilizing a single perspective, are provided by this study.

Third, the general literature on privatization has limited relevance in understanding the phenomenon of school fees. For instance, broad privatization trends do not explain the existence of long standing extracurricular, incidental and project fees in public schools. They might, on the other hand, explain active recruitment of international students by large urban districts, government support of private schools in British Columbia starting in the late 1970's, as well as community and parental empowerment in the education policy arena. This study addressed the subject of international students and fees but failed to adequately investigate the other two issues. By limiting privatization to mean transfer of public to private provision, privatization theories do not apply in this area of school fees.

Based on the foregoing discussion on the relative value of components of the conceptual framework and informed by the findings of this study, a modified framework could provide the basis for future investigations of the processes of educational finance and school fees (Figure 3). Such a tool would be changed to emphasize and deemphasize given concepts. Values governing public school finance would relate the role of government in education, equity principles, privatization and public policy issues. Sub-themes would be largely derived from the field as shown. Policies and laws of education finance would consider the two sub-categories of private/public education and legal aspects of education. Public aspects would be informed by discussions about required program, quality and equality, whereas private aspects would be informed by types of fees, quality and inequality issues. Legal aspects of education would consider school law, requirements for free education and school board input. Court decisions, legal interpretations and equal education are removed as they perhaps related uniquely to the situation in the United states. Under administrative effects of school fees, yield and elasticity

would be removed and more emphasis placed on the subcomponents of efficiency in the light of interviewees' responses. The real socio-educational effects of fees are not fully revealed by the opinions of school representatives as parents and students were not questioned. Among the background variables, district and school features such as size, wealth, and grade level were important in helping to explain fee structures. However, ethnicity and location were less useful factors in the context of available data. Therefore, the major constructs of values of public school finance, policies and laws of public school finance, administrative effects, socio-educational effects, and external variables affecting school fees would be retained with their causal linkages. However, the constructs would be modified by adding or eliminating elements as indicated in Figure 3.

### Implications for Future Research

Informed by the results of this study and the theoretical discussions, a changed framework, as depicted in Figure 3, could provide the basis for future investigations into different types of fees, related administrative processes, effects and methodology. The new framework incorporates findings from employees working at three different levels of the school system as well as from different school districts thereby providing a wealth of information for the development of interview schedules or inventories and direction for future qualitative and quantitative analyses. Use of such a device, together with descriptive data from studies on school fees and conceptual approaches to privatization and market efficiency (Lauglo, 1992; Barton and Thompson, 1992; Brown and Contreras, 1991), choice (Johanek, 1992) and public policy may provide further knowledge about why, how and with what consequences school fees are levied. Further investigation of school fees is warranted to propose answers to substantive questions about types,

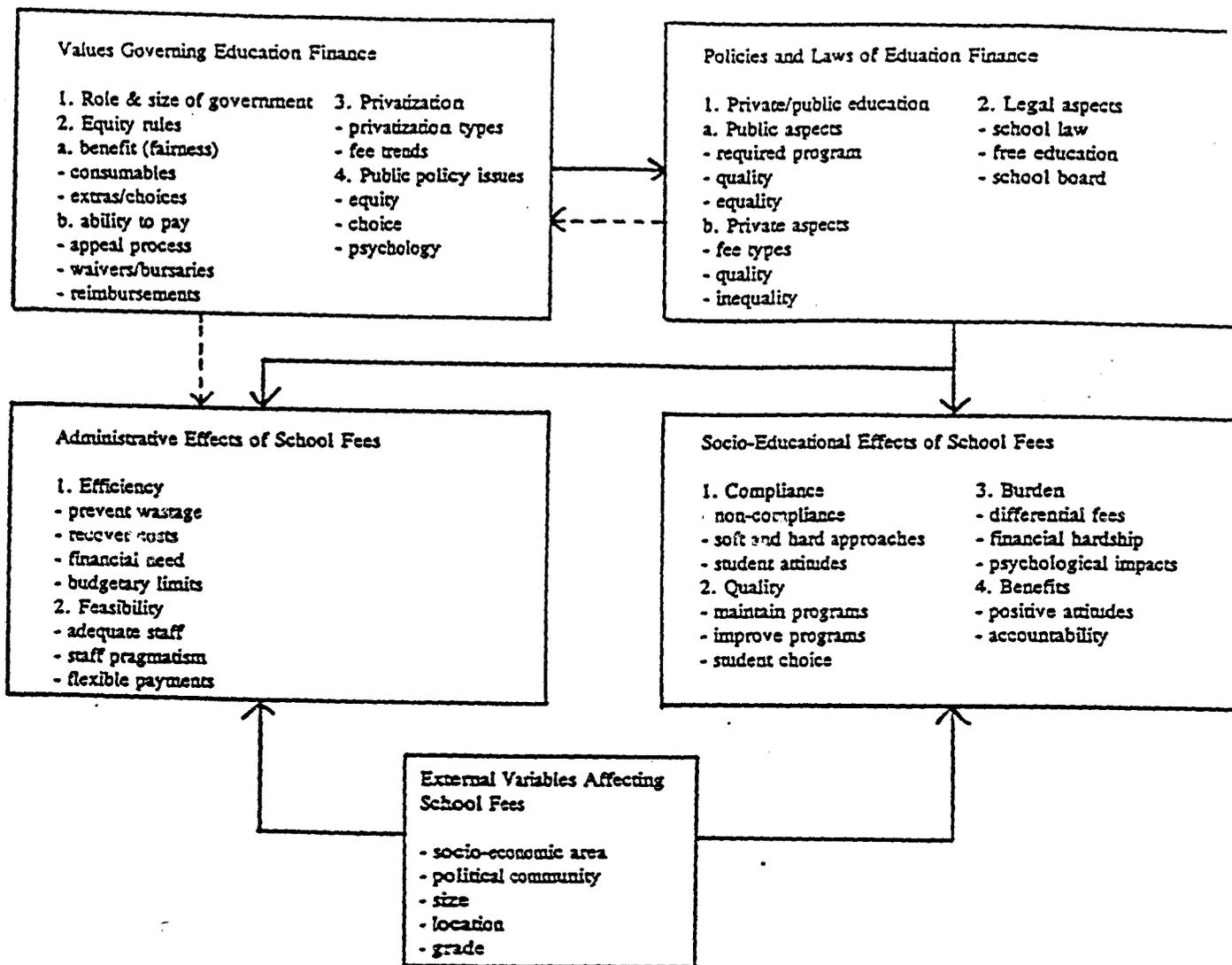


Figure 3. Modified framework of school fees in public education.

administrative processes, and effects of fees. Substantive and methodological implications are outlined below.

While the forms of taxation and concepts of equity, efficiency, and administrative feasibility provide a rich framework for analysis of school fees, no other studies exist in the education literature that apply a conceptualization of fees to taxation theory. Descriptive studies abound about the types and magnitudes of school fees. The more analytical studies have been found on the subject of school case law. Researchers would find it helpful to apply taxation theory. A thematic analysis of interview data in this study linked first-order concepts of practitioners to second-order concepts derived from taxation theory. Distinctions between mandated programs, electives, extras and the user benefit argument informed the concept of benefit equity. Similarly, ability-to-pay equity was explained by an understanding of administrative mechanisms such as fee waivers, bursaries and reimbursements. Within this context, educators are forced during routine practices to weigh their sensitivity to poverty against the costly nature of some activities and programs, and the limitations of school budgets. A set of issues peculiar to education informed the efficiency concept. For example, inculcation of positive values and program enrichment from fees had to be balanced against potential negatives such as fee differentials and the social and political realities in which schools operated. Administrative feasibility included first-order concepts of sufficiency of resources; collecting, accounting and auditing procedures; withholding practices; operationalizing an equitable fee structure; and student compliance. These administrative processes deserve more rigorous investigation taking the first-order concepts generated as points of departure. Finally, much can be learned from the debates on user fees in other social service areas such as health and transportation.

This study cast questions about types of fees within a conception of private and public sectors of education and legal issues of fees. In relation to fee types, four categories were identified in this study. Future investigations are needed to find out if a single general school fee is more economical to students and efficient for school administration purposes than small frequent payments for various items. Studies in this area could also ascertain what costs students incur for various categories of fees in the senior grades, what fees and amounts students and their parents are most willing to pay, what pressures are districts and schools feeling toward imposing fees and from where do the pressures originate. Quantitative research would also be a logical extension in order to determine fee patterns over time. This type of research would inform the continuing debate about the private and public spheres of education and the extent to which school law can be used to enlarge one or the other sphere.

Further research on administrative effects and processes is required to identify supplementary variables that explain the efficiency and feasibility of school fees administration. Administrative efficiency was primarily explained in the study by factors such as prevention of waste, cost recovery, budgetary limits and traditional practices. The feasibility component included the sub-themes of adequate resources, staff pragmatism, type of collection procedures, and flexibility in fee payments. Future research would also provide knowledge about how school districts could significantly change their fee structures for success. The degree of fee administration centralization used by schools was not a major issue in this study, however, future research could indicate how district and school fee processes and effects differ under different levels of centralization. It would also contribute to discussions about efficient and appropriate use of resources. A number of smaller issues could also be subsumed under the two global concepts of efficiency and feasibility. They include measures taken by schools to address delinquency, the firmness of school authorities on fee policies, and the management of

accounting and application processes. Finally, as school systems across provinces/states and nations look for ways to increase their revenues, it is necessary to know to what extent school fees are being used as a means to supplement revenues.

Further study on socio-educational effects is required to better inform the subconcepts of compliance, quality and burden. Future research needs to determine how quality factors are best enhanced through fees. At the same time, investigation of the circumstances under which fees deny students full participation in public education is warranted in order to eliminate such conditions. This study was unable to conclusively establish if access to educational programs is limited to students' ability-to-pay and if students are foregoing academic or technical-vocational studies and basic school supplies because they cannot pay fees. As the psychological health and self-esteem of students are paramountly important to academic achievement, we need to know what pressures students feel when schools take actions against them for outstanding payments, and what effect is done to the self-esteem if a school system declares indigent a student who is unable to pay fees. Similarly, the benefits arising from student contributions such as positive attitudes and accountability suggest, but do not prove, that there is an intrinsically good aspect to fees.

From a methodological viewpoint, reliance on interviews as the major source of information was helpful in examining the processes by which fee structures are established and applied. The method of investigation utilized educators in three different roles within the educational system thus it was able to depict rich perceptual descriptions of the same issue from different vantage points. Interviews uncovered and made accessible detailed accounts about the administrative processes associated with fee collection and application. As well, the interviews with educators provided in their own words illustrations of how they talked about fees in public education and how they believed such costs impacted on the provision of education to students.

Interviews remain the best way of seeing institutions and their processes from the perspective of people who move through them. Major drawbacks include formulating and posing the right questions, time constraints and data reduction for analysis while retaining their richness and detail.

This study approached the issue from the point of view of employees in the system but future research may usefully tap and describe the perceptions of students and parents. Are student's and/or parent's perceptions markedly different from those of school administrators and teachers? Findings in this study did not reveal the perceptions of students or their parents about the issue of fees in public education. Yet parental and student behavior were noted as greatly influencing the success or failure of fee policies. School authorities often referred to fees as minimal or reported that students experienced little or no embarrassment in seeking assistance from the school. But there is no evidence from students themselves to support or refute these opinions. Students and their parents are also better placed to identify and estimate costs for the kinds of educational programs for which they are willing to pay. A student focused investigation may more effectively measure how student commitment and motivation levels are influenced by the contributions they make to their education. Also, a more direct relationship may be established between school fees and drop out rates among high school students, particularly if recent drop outs could be included in such an investigation.

Furthermore, after completing this study, a political paradigm involving the study of interest groups might shed light on the subject of school fees. The subject could involve a range of choices which are politically driven by factors such as the values of a society and the preferences of political parties and pressure groups (e.g. anti-poverty groups, parental organizations, school board members, members of the local legislature, teachers' union, etc.).

Questions such as what is the Province's public policy and what is its capacity to implement that policy would be posed. This perspective could be linked with data from parents and students.

Questions aimed at comparing longer time periods may help throw more light on this issue. Based on the reports of school authorities previous attempts have been made to eliminate fees from public education under the New Democratic government in British Columbia. The current school law is perceived as a reaffirmation of that educational policy. There appears to be a cyclical pattern in the policies and practices of school fees which may or may not be related to particular regimes. Different governments and school organization, where what is considered extracurricular becomes the core curriculum, are likely to radically change school fee structures. Finally, a more long term, historical approach to research on this subject would elucidate what happens to fees in public schools when different periods of economic recession and budgetary restraint are compared.

A comparative study controlling for different kinds of provinces and countries would contribute more to our understanding of this subject. This study focused on school fee policies and processes in the province of British Columbia. However, this context represents a perspective which may be applicable to the rest of North America and Western Europe. As noted previously, even in Western Europe, substantially different configurations of the private and public spheres of education exist and private contributions to education are likely to be different. Issues relating to the financing of education via fees in developing countries are of an entirely different order due mainly to existing crises in the economies of those nations. Thus, secondary education often requires payment of tuition fees which could represent a sizeable proportion of a family's income. Comparative studies across different contexts would provide comprehensive accounts about private contributions to education and further extend our knowledge about fee effects internationally.

### Implications for Policy

Since both the benefit and ability-to-pay principles are supported by the evidence in this dissertation two policy directions are presented for discussion. One is to maintain current levels of school fees and the other is to augment them. The two directions are for all jurisdictions to consider and the British Columbia context is used merely as a featured example. Educational policy must consider the educational goals of equity, human development, and free public education in the light of the need for educators to develop educational programs which meet the needs of students and their local communities. In turn, these evaluations should take critical account of how school fee policies fit within the economy and political initiatives such as privatization. An important area of interest for policy needs to consider who would be the winners and losers under fee reduction or augmentation.

In the context of parental and community involvement in the schools of British Columbia, educational questions require approaches that give due consideration to demonstrated community preferences. Recent developments in British Columbia reaffirmed the central importance of the public education system to the proper functioning of society (Baldrey, 1993a, 1993b; Monro, 1993; Boei and Balcom, 1993; Aird, 1993). Moreover, some redefinition of issues relating to parental and community participation in education ensued during May of 1993 after a prolonged teacher strike. Parents and community hold high expectations for the smooth operation of education within British Columbia.

Public secondary education in British Columbia is financed by a combination of funds raised through grants from the provincial government and a small amount of miscellaneous revenue. There is no compensation for poorer districts because no districts have access to local

tax money. In an education finance report by the British Columbia Teachers Federation it was noted that by determining which public school programs should receive some measure of provincial funding, the government takes a position on which programs are optional or discretionary. Thus, for example, extracurricular transportation and summer school are optional or discretionary programs for which no government grants are forthcoming (1989, 2).

### Policy Direction One: Minimize Fee Structures

Reduction of existing fee structures by education authorities would require addressing three major subjects. They include principles derived from taxation, administrative actions for operationalizing the policy, and the likely effects resulting from minimizing fees. Specific recommendations are listed below.

#### Recommendations

1. All school fees, charges and deposits are to be removed from curricular areas including rentals for musical instruments, textbook deposits, workbook deposits and project costs.
2. Schools would fund any item, activity or program deemed necessary for the completion of an educational program that counts towards promotion or graduation.
3. Students would be provided with the basic materials needed to complete course electives. Any elaborate or specialized projects are disallowed where financing by the school budget is unavailable.
4. School services from which a majority of students benefit such as student council activities, lockers and mailings would be covered by the school budget.
5. Student fees for extracurricular activities may be retained but would be minimized as much as possible. For instance, schools would meet most of the costs of graduation ceremonies, yearbooks, fieldtrips, and expensive team sports.
6. Summer school must be made available free of charge for students who require successful completion of given courses in order to enter their next grade level.

Where advanced courses are offered either during the regular school year or during summer school period, they should be funded by school districts rather than by students.

7. Correspondence education courses must be paid for by the district when students are disadvantaged by the school and principal approval is obtained. Under normal circumstances, students may not take correspondence courses through their school.

8. International education programs operated for profit by school districts are to be discontinued. Students must be accepted on an exchange basis or as bona fide resident students in public schools, thereby removing tuition fee requirements.

Across-the-board reduction of fee levels means at the very least that students from low income families would not have to worry about being unable to pay for expensive technical studies projects, non-traditional physical education programs, fieldtrips, art supplies, etc. This policy option gives prominence to the ability-to-pay rule. It also regards education as primarily a social benefit for which society should pay through taxation. Free and equal public education are the two central values that undergird this approach. Because public education is compulsory for students between the ages of six and sixteen then they should be provided with the necessary resources to successfully complete their education. Moreover, the quality of public education is not necessarily enhanced by the implementation of student fees. If fees are thought to be a requirement by educators then they need to re-examine the goals and outcomes of educational programs. They must also evaluate the aims of instructional programs within available resources. Many of the activities, items and programs for which students pay are mere additives to an schooling system that has been much criticized for failing to offer quality education in basic literacy and numeracy. The bulk of education dollars comes from taxation and preoccupation with imposing, collecting, accounting and allocating modest fee revenues likely produce unnecessary hardships on students, parents, teachers, sponsors, and school administrators.

Several administrative actions would have to accompany a policy to reduce fees. District and school administrators would need to inform teachers, students and parents about the new rules, goals and guiding philosophy. Fee waivers and other redistribution mechanisms would be reduced or eliminated. Time and effort would be saved as reimbursements for successful completion of correspondence courses and textbook and workbook deposits would be eliminated. Similarly, removal of project costs, student council and general school fees would decrease administrative burdens. However, in many schools some streamlining of fee collection and accounting, particularly in extracurricular areas when teacher sponsors are involved would be required. Efforts to bring down fees should be matched by administrative efforts to ensure that students have sufficient available resources for course electives and career preparation. This might mean allocating human resources to raise funds to support curricular and extracurricular activities and items regarded as important to students and teachers such as annuals, socials, graduation dances, fieldtrips, sporting events and projects. However, fund raising also has the potential to increase inequities.

A policy of fee structures minimalization would produce a set of desirable effects for poor students, schools in depressed locations of inner cities, students differentially affected by fee-attached curricula, and school administrators and teachers. The aim of justice based upon ability-to-pay and fairness would be observed particularly for students in financial straits thus minimizing student embarrassment caused by poverty. These students are by right entitled to the same quality of education as students from wealthy homes on whom \$50 for a student project or \$200 for a summer course has little impact. Most importantly, the school would reduce the extent to which students' choices of electives and other items are selected or avoided because of financial considerations. Students who are in vocational areas would face a reduction of costs more in line with students in regular academic subjects. Teachers and school administrators

would benefit from a reduction of fees in that their collection efforts would be minimized thus freeing up time and effort for more important educational tasks.

### Policy Direction Two: Augment Fee Structures

The principles which underlie fee structures augmentation are benefit equity, positive effects on programs and students, and willingness to pay. Specific recommendations are listed below.

#### Recommendations

1. School fees would cover the cost of materials in areas such as technical and vocational studies and career preparation particularly where students derive individual benefits by possessing or consuming items.
2. Schools are to provide basic educational materials, activities and programs that are part of the mandated educational program. Beyond that, for electives, projects, field trips and special activities and items fees to cover costs are required to be paid by students (e.g. textbook rentals, instrument rentals, daily transportation, student workbooks, etc.). Fee waiver arrangements would be put in place so that teachers and administrators could avoid undue burdens on students and their families.
3. Students who take Physical Education 11 and 12 (recreational sports programs) would pay costs for transportation and use of community facilities for activities such as horseback riding, white-water rafting, golfing, sailing, bowling, etc.
4. A single school fee of \$100 per semester would be assessed to support student council activities, mailings, yearbooks, athletics, textbook replacement, locker rentals, and graduation ceremonies as the majority of students benefit directly from these services.
5. School sponsored extracurricular activities supported by fees are an important part of the school program.
6. Summer school fees are paid by students as that program is run on a self-sustaining basis.
7. Students who take correspondence courses would be responsible for payment unless declared to be disadvantaged by the school.
8. International students are required to pay tuition fees as established by the school district to which they apply.

The benefit principle side of taxes is applied here because benefits for certain educational services are internalized by individual students. Students in nontraditional sports programs, for instance, benefit beyond the usual requirements for physical education. They also derive consumption benefits from such activities. School projects which become the possessions of students provide an excellent example of consumption benefits. Furthermore, high school students attend school beyond the compulsory attendance age requirement established by school law. Thus, their education beyond that period is voluntary attendance. Some school representatives indicated that some students and parents are willing and able to pay for nontraditional leisure sport programs, expensive technical projects and extended fieldtrips. Schools should be free to innovate, experiment and modify educational programs with the aim of improving the quality of education. At the same time, students often demonstrate higher levels of interest, motivation and commitment when involved in new programs which they chose. Revenues from fees in financially pressed school districts enable public school programs to cater to the diverse needs of several different cultures, beliefs, educational philosophies and student goals.

Several administrative decisions would have to accompany a plan to increase fees in schools. Efficiency of fee structure operations depends greatly on schools being able to minimize the related workload. As a basic requirement, teacher collection must be reduced. This would be best accomplished by utilizing the assistance of students for operation of a school store where goods such as educational supplies, uniforms and project materials are sold. In addition, reminders, withholding strategies and simplified enforcement practices need to be implemented. Schools should adequately staff school offices particularly at critical times such as at the beginning of the academic year and semester. Where feasible, implementation of automated systems for private accounts would facilitate faster and easier payments. Elimination

of trivial fees and rentals for lockers and books would relieve some of the workload for office personnel and be replaced by a general tuition fee that produces some benefits for students and schools alike. By charging a tuition fee of \$100 per semester, a school of 1,000 would generate \$200,000 and be able to eliminate trivial fees of less than \$10. At the same time, near-universal benefits would be supplied to students such as school annuals, communications with parents, and student council operations. Administrative mechanisms such as fee waivers would cover a small percentage of students. As a related measure, administrative criteria should be delineated to determine how waivers should be applied. Furthermore, measures should ensure that families with more than one child in the same school receive reductions where needed. District funding practices should also take account of schools that experience budget shortfall in programs requiring student fees due to the low income status of school catchment areas. School boards should request that claims of inability to provide given services be justified by surveys and other objective data.

A number of attractive consequences arise from an augmented fee structure in schools. Justice should be served by observance of the benefit aspect of equity. As well, fairness is ensured when students' costs are in line with the benefits they gain. Under this approach, students are encouraged to take greater responsibility and ownership for the operation of given services in their schools. Specifically, a higher flat tuition fee serves the purpose of levelling out the differential costs experienced by students in technical studies. More students would experience the advantage of being able to select particular programs and activities in line with their preferences. A major positive outcome would be the strengthening rather than curtailing of programs requiring materials and services not covered by school budgets. At the same time, specialized programs such as career preparation are maintained and new programs introduced with the additional generated fee revenues. Schools would experience greater flexibility and

autonomy in the allocation of money from school based revenues. Potentially unattractive effects of increased fees are: increased student embarrassment, more bookkeeping costs for schools and negative political reactions from parents. However, where adequate resources and equipment already exist for fee administration, no major long term costs may be expected and the negative political reactions from some parents may in fact be cancelled out by positive support from others.

A school board policy for fees may draw from both policy directions as outlined and discussed for a single coherent approach. In addition to paying attention to the ability-to-pay and the benefit principles, the essential nature of curricular programs would need to be emphasized. At the same time, extra-curricular events could be decreased as a cost saving to parents and students if the fee minimalization direction is taken. It is unlikely that schools could remove all incidental and extracurricular costs and still maintain a vibrant student government, exciting sports programs and a wide range of supplementary educational experiences.

### The Way Forward

Although public education in the Western world is intended and assumed to be free, the extent to which students and their parents contribute to services and items varies. Historically, public schools systems in Canada, the United States and Western Europe have commonly charged fees for consumables and optional educational activities or programs. Privatization of public education based on a user pay system has had only limited applications to Western education in the period after the two world wars.

Further privatization of educational services is only one feature of a complex economic and political landscape against which school fees can be interpreted. In British Columbia, privatization initiatives under the Social Credit government have corresponded roughly with a period when educational policy sought to eliminate public school fees. Educators have referred to an earlier period, during the 1970's, when a similar policy was emphasized under the New Democratic government of the day. It was thought that some fees have subsequently crept back into the system and that current school law is simply a reaffirmation of the earlier educational direction.

The current educational climate and thrust of educational initiatives in Western countries favour parental, student and community participation in public education decisions. These stakeholders are demanding relevant and excellent quality programs to meet student and societal needs. At the same time, taxpayers are showing great resistance to increased public spending. School authorities have risen to the challenge posed by parental, student and community demands by developing work study, co-operative education, and other specialized career preparation programs. But these are expensive alternatives to traditional classroom practices. Who should pay for these expensive options? How best should education be supported as we enter the twenty-first century? Do we want a privatized public education system that relies heavily on user fees and other private market mechanisms or do we want a fully tax funded system? Pragmatic vantage points currently dominate within the educational arena as politicians grapple with competing political and economic agenda and educational administrators struggle with inadequate budgets.

One path forward requires the reinvention of government where the entrepreneurial spirit transforms the public sector (Osborne and Gaebler, 1993). This model rests on beliefs about: the need for effective government, the ineffectiveness of bureaucracies, restructuring the public

sector, and equal opportunity. When ten principles of entrepreneurial government are adhered to, reinvention leads not to higher taxes or reduced spending but to better government. A school system reformed according to the ten principles of public spending would be greatly changed. State or provincial governments and school boards would direct schools but teachers, colleges and community organizations would operate them. Parents would have a great deal of control over their children's schools. The state or provincial government would measure and publicize many different kinds of results including test scores, parent, student and teacher satisfaction surveys, and dropout rates. Schools would be proactive in preventing problems rather than constantly reacting to failure. They would also be encouraged to earn more money by attracting more students, starting another school, or providing new services. State or provincial governments would solve problems that arose by changing the rules and incentives of the system they created. It is predicted that together those changes would create a system in which parents could choose what they wanted for their children and schools would have no alternative but to do so if they wanted to remain competitive. Schools would have great freedom but be more directly accountable to parents (pp. 314-319). Such a policy redirection as discussed by Osborne and Gaebler is contrary to the idea of a free public education administered by professional educators, but it may come to pass. The positive outcomes mentioned are accompanied by drawbacks made apparent from this study, such as financial and psychological burdens on some students, reduction in participation levels, increases in administrative costs, and parental opposition.

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Appendix A  
Revised Statutes British Columbia  
Section 100 of the School Act (1989)

## Fees and Deposits

Section 100. (1) A board shall provide free of charge to every student of school age resident in its school district and enrolled in an educational program in a school,

(a) instruction in an educational program sufficient to meet the general requirements for graduation set out in the orders of the minister, and

(b) educational resource materials necessary to participate in the educational program.

(2) For the purposes of subsection (1) a student is resident in a school district if the student is ordinarily resident in the school district and the guardian of the person of the student is ordinarily resident in British Columbia.

(3) Subject to subsection (1) and to the orders of the minister, a board may charge fees for goods and services provided by the board.

(4) A board may require a deposit for educational resource materials provided to students registered under section 13.

(5) If a board requires a deposit under subsection (4) it shall refund all or part of the deposit to the student or child or return on the educational resource materials.

(6) A board shall publish a schedule of the fees to be charged and deposits required and shall make the schedule available to students and children before the beginning of the school year.

(7) A board is not responsible to pay for any educational activity undertaken by a student that is not provided by the board.

Sections 12 and 13 are relevant to section 100:

## Home Education

12 A parent of a child who is required to enroll in an educational program provided by a board under section 3 may educate the child at home or elsewhere in accordance with this Division and shall provide that child with an educational program.

## Registration

13. (1) A parent of a child who is required under section 12 to provide the child with an educational program shall register the child on or before September 30 in each year with

## Appendix A con't

- (a) a school of the parent's choice that is operating in the school district in which the parent resides,
  - (b) a regional correspondence school providing services to the school district in which the parent resides or with the minister if no regional correspondence school provides services to that district, or
  - (c) an independent school operating in British Columbia.
- (2) If a parent wishes to register his or her child with a school in accordance with subsection (1), the board having jurisdiction over the school shall ensure that the administrative officer responsible for that school registers the child.
- (3) A school that registers a child under this section shall provide the child with access to educational services in accordance with the regulations.
- (4) A person who contravenes subsection (1) commits an offence.

Appendix B  
Summary of Constitutional Provisions for Free Education in the United States

## Summary of State Actions

State	Free in consti- tution	No wording of free in consti- tution	Free in state statute	Clearly defines some issues	Litigation resulting in decision concerning fees
Alabama		X	X		
Alaska		X	X	X	X
Arizona	X		X		X
Arkansas	X		X	X	X
California	X		X	X	X
Colorado	X		X	X	X
Connecticut	X		X	X	X
Delaware	X		X		X
Florida	X				X
Georgia	X				X
Hawaii		X	X		X
Idaho	X		X		
Illinois	X		X	X	X
Indiana		X		X	X
Iowa		X	X	X	X
Kansas		X		X	X
Kentucky		X	X	X	X
Louisiana		X	X	X	X
Maryland	X		X		
Massachusetts	X		X		X
Michigan	X		X		
Minnesota		X		X	X
Mississippi	X		X	X	
Missouri	X		X	X	X
Montana	X		X	X	X
Nebraska	X		X	X	X
Nevada		X			
New Hampshire		X		X	X
New Jersey	X		X	X	
New Mexico	X		X	X	X
New York	X		X	X	X
North Carolina	X		X	X	X
North Dakota	X		X	X	X

cont'd

## Appendix B Cont'd

State	Free in constitution	No wording of free in constitution	Free in state statute	Clearly defines some issues	Litigation resulting in decision concerning fees
Ohio	X		X		
Oklahoma	X		X		X
Oregon		X	X	X	
Pennsylvania		X	X	X	X
Rhode Island		X	X		X
South Carolina	X			X	X
South Dakota		X	X		
Tennessee	X		X		
Texas	X		X		X
Utah		X		X	X
Vermont		X		X	
Virginia	X		X	X	X
Washington		X	X		X
West Virginia	X			X	X
Wisconsin	X		X	X	X
Wyoming	X		X		X

Source: Michael J. Vetere (1986), pp. 115-117. The table summarizes state actions concerning free schools and litigation relating to the assessing of fees.

Appendix C  
Decisions Rendered by Courts in the United States of America on School Fees

Decisions Rendered by Courts on Items That May or May Not Be Assessed Fees in Each State.

State	Fees may be assessed	Fees may not be assessed
Alabama	incidental fees, lab, shop, repairs, fuel brooms, water	incidental fees when part of tuition, interscholastic athletics
Alaska		tuition
Arizona	textbooks	instruction, elementary textbooks
Arkansas	drivers education	incidental material including hard covered textbooks, films, paperbacks, workbooks, filmstrips dictionaries, tuition registration fee to extend term, incidental fee as part of tuition.
California		no fee, deposit or charge not specifically authorized by law
Colorado	textbook rentals, miscellaneous fees as a condition of participation or attendance at an activity not within the academic portion of the educational program	tuition, extracurricular activities fee

cont'd

## Appendix C Cont'd

State	Fees may be assessed	Fees may not be assessed
Connecticut		tuition, matriculation fee
Delaware		tuition
Georgia	summer school	incidental fees matriculation fees, textbook rental
Hawaii		equipment, material and other fees
Idaho	social and extra- curricular activities	textbooks, activity fee, charge on attendance, necessary elements of any school activity
Illinois	textbook rental, work- books, supplies, damage deposit, towels, gradua- tion fees, magazines, duplication paper, books, dictionaries paperback books, lunch programs supervision	
Indiana	textbooks, textbook	items where one of each would sufficient for the benefit of the whole school, e.g., charts, maps, blackboards
Iowa	textbooks	

cont'd

## Appendix C cont'd

State	Fees may be assessed	Fees may not be assessed
Kansas	textbook rental supplemental workbooks materials, special clothing and towels for use in phys. ed and science class, musical instruments, materials consumed in class where pupils retain projects	incidental fee as part of tuition.
Kentucky	textbook rental	
Louisiana		school books and other supplies, materials of instruction
Maine		school books, necessary apparatus and appliances
Maryland		tuition, textbooks, supplementary reading materials for instruction, visual and auditory aids, stationary school supplies
Massachusetts		textbooks
Michigan	interscholastic when voluntary participation voluntary participation	textbooks, school, supplies, essentials essentials of a school system

cont'd

## Appendix C cont'd

State	Fees may be assessed	Fees may not be assessed
Minnesota		textbooks
Mississippi		athletic, library, literary fees, fees as a condition of admission, textbooks
Missouri		registration and course fees, tuition
Montana	reasonable fees for supplemental instruction on private basis summer school, supplemental material	courses, workbooks, equipment, any course or material related to a recognized academic and educational goal of a particular school system
New Jersey	behind the wheel driver education	textbook, school supplies
New Mexico	reasonable fees for elective courses	courses required of every student sufficient for every education, instructional material
New York		No fee or charge not specifically authorized by law
North Carolina	incidental course and instructional fees, reasonable for enhancing the quality of educational effort, supplies and materials of personal use, lockers, supplemental supplies and materials	tuition fees

cont'd

## Appendix C Cont'd

State	Fees may be assessed	Fees may not be assessed
North Dakota	extracurricular or non-curricular activities where attendance is optional, personal equipment, behind the wheel driver ed., textbook security deposit	
Ohio		textbooks
Oklahoma	gym uniforms	band uniforms, all educational and extra curricular activities
Oregon	textbooks at discretion of school board	textbooks
Pennsylvania	uniform gym suits, shoes towels, all fees associated with driver education	necessary furniture, textbooks, school supplies and other appliances needed
Rhode Island		textbooks, school supplies
South Carolina	Summer school, textbook rental, pencils, tablets workbooks, drawing materials	matriculation fee
South Dakota		textbooks
Tennessee		after school extracurricular activities
Texas		textbooks

cont'd

## Appendix C Cont'd

State	Fees may be assessed	Fees may not be assessed
Virginia	textbook rentals consumable material	adequate buildings andequipment, competent teachers, other basic matters associated with public school
Washington	textbooks if approved by the people	
West Virginia	optional items	textbooks and necessary materials, attendance fees, workbooks
Wisconsin	textbooks, towels, band instruments, pens paper, notebooks gym suits	optional credit courses and apparatus, manual training fee instruction
Wyoming		textbooks, supplies

Source: Michael J. Vetere (1986) pp 140-144.

Appendix D

British Columbia School District Characteristics

Table I Size (Enrollment) and Number of Each District Type

District Type	Size Enrollment	No. of Districts	District name
I	0 - 800	6	Central coast, Stikine, Kettle Valley, Keremeos, Nishga, Agassiz-Harrison
II	801-2,500	23	Princeton, Arrow lakes, Vancouver Island West, Fort Nelson, Lake Cowichan, Lilloet, North Thompson, Queen Charlotte, Grand Forks, Windermere, Gulf Islands, South Cariboo, Golden, Summerland, Hope, Armstrong-Spallumcheem, Burns Lake, Revelstole, Kimberley, Merritt, Creston-Kaslo, South Okanagan, Castlegar
III	2,501-6,000	22	Kitimat, Sunshine Coast, Vancouver Island North, Bulkley Valley, Nechako, Howe Sound, Powell River, Trail, Qualicum, Nelson, Fernie, New Westminster, Prince Rupert, Cranbrook, Penticton, Shuswap, Quesnel, Peace River North, West Vancouver, Terrace, Mission, Peace River South
IV	6,001-9000	10	Campbell River, Alberni, Cowichan, Courtenay, Saanich, Chilliwack, Sooke, Vernon, Cariboo-Chilcotin, Maple Ridge-Pitt Meadows
V	9,000-15,000	3	Abbotsford, Nanaimo, North Vancouver
VI	15,001-21,000	7	Kamloops, Central Okanagan, Langley Burnaby, Delta, Richmond, Prince George.
VII	21,000+	4	Coquitlam, Greater Victoria, Surrey, Vancouver
Total		75	

Source: Ministry of Education (1990) Information Management Report.

Table II Ethnic Composition of British Columbia, 1961 and 1986

Ethnic Group	1961		1986	
	Number	%	Number	%
British	939,269	57.7	1,759,810	61.8
German	118,926	7.8	148,280	5.2
Chinese	24,227	1.5	112,605	4.0
South Asians	-	-(a)	69,250	2.4
French	66,970	4.1	68,965	2.4
Netherlands	60,179	3.7	62,945	2.2
First Nations	38,814	2.4	61,130	2.1
Scandinavian	96,792	5.9	52,560	1.8
Ukrainian	35,640	2.2	48,200	1.7
Italian	38,399	2.4	46,766	1.6
Russian	27,448	1.7	-	-(b)

Source: Report of the royal Commission of Education, 1988.

Note: Ethnic groups listed in descending order of 1986 population (a) insufficient number in 1961 to warrant separate category.(b) not among the 10 largest ethnic groups in 1986.

Table III Ethnic Composition by School District

District	Primary Language Spoken in the Home	%
Merritt	English	88.85
	Punjabi	10.15
Surrey	English	87.76
	Chinese	1.35
	Punjabi	5.86
Richmond	English	76.42
	Chinese	13.47
	Japanese	1.43
	Punjabi	3.08
Vancouver	English	49.24
	Chinese	26.99
	Hindi	2.46
	Italian	1.08
	Japanese	1.06
	Punjabi	4.49
	Spanish	2.45
	Tagalog	1.41
Vietnamese	3.46	
New Westminster	English	87.86
	Chinese	3.45
	Punjabi	2.08
Burnaby	English	80.89
	Chinese	7.55
	Korean	1.11
	Punjabi	2.19
Kitimat	English	85.62
	Chinese	1.22
	Portuguese	5.10
	Punjabi	4.74

Source: The Ministry of Education, (1990) Information Management Branch Report.

Appendix E

Letter Requesting An Interview With School Authorities

Department of Administrative Adult and Higher Education  
Faculty of Education  
2125 Main Mall  
UBC, Vancouver  
B.C.  
V6T 1Z4

November 19, 1991

Superintendent of Schools  
School Board Office  
B.C.

Dear \_\_\_\_\_

RE: Request for an interview

The collection of fees from secondary students has become an issue in B.C. during the last few years, yet there is a lack of information about fee-collection practices, the impact of fees, and the factors which influence them. I have chosen fees as my dissertation topic in Educational Administration at U.B.C. My work, supervised by Dan Brown, Ian Housego, and Vincent D'Oyley, requires that I interview school district administrative personnel, school principals and other school officials who possess an intimate understanding of this subject. Would it be possible to interview you or your designate during November or early December? I shall call in a few days for your response. You may reach me at my home telephone number: 734-4463.

Best Wishes

Claudette Bouman

Doctoral Candidate

Appendix F  
Interview Schedules

## District Level Interview Schedule

### A. Fee Policy and Practices

1. What programs, activities, materials do you currently require students to pay for and what are the fee amounts?
2. What is the district's policy on fees?
  - E.g. Rental of school textbooks
  - Science Subjects and Practicals
  - English/Social Studies/History etc.
  - Modern languages
  - Vocational programs
  - Technical programs
  - Computer courses
  - Music tuition and/or instruments
  - Fine Arts
  - Physical education
  - Field trips
  - Extra-curricular team sports/club activities
  - Transportation
  - Student council
  - Student entertainment
  - Graduation
  - Summer school/correspondence/alternate school/ international education
3. What process is available to students (or parents) who object to a fee or for those who are financially unable to pay the required fee?

### B. Effects of School Fees

1. What benefits do you perceive for schools when fees are applied?
  - How do students benefit?
  - What benefits are there for school and/or community?
2. What disadvantages do you perceive for schools when fees are applied?
  - Does having a fee for a course or program deter student involvement?
  - Are students in non-academic programs affected more by fees than those in academic programs?

### C. Factors Influencing Fee Policy

1. What are the primary reasons for the existence of a school fees policy?

2. What has been the trend over the past ten years with school fees in public schools?
3. If your school District is charging student fees, upon what authority does it base this practice?
  - E.g. Provincial Law
  - Regulation of the Ministry of Education
  - Perogative of the school board of education
  - Perogative of the local school administration
  - Tradition

#### D. Issues Related to Fees

1. Are fees in public education inconsistent with the notion of free public education?
2. Does supplementing school revenue through student fees reduce government's responsibility for education?
3. What equity issues arise when student fees are applied?
4. What changes or recommendations would you suggest in this area?

## School Interview Schedule

### A. Fee Practices

1. What programs, activities, materials are students paying for and what are the fee amounts?

E.g Rental of school textbooks  
 Science subjects and practicals  
 English/Social Studies/History etc.  
 Foreign languages  
 Vocational programs  
 Technical programs  
 Computer Courses  
 Music tuition and/or instruments  
 Physical education  
 Field trips  
 Extracurricular team sports/club activities  
 Transportation  
 Graduation  
 Student council  
 Student entertainment  
 Graduation  
 Summer school/correspondence/alternate school/  
 international education

2. When were these fees introduced?

### B. Fee Administration and Processes: establishment, collection and allocation.

1. How is the amount for a fee determined?
2. Describe the process by which course fees are set and applied.
3. What difficulties are experienced in the administration of fees?
4. What strategies are used to effectively cope with these difficulties?
5. Is there general agreement or disagreement among teachers about imposing fees?
6. What measures are taken to ensure that proper bookkeeping, accounting and auditing procedures are in place?

### C. Effects of School Fees

1. What are the social, financial and other effects of levying fees?
2. Are certain groups of students affected more by fees than others?
  - Those in non-academic (technical/vocational) programs versus those in university preparatory programs
  - Athletes and students engaged in many extra-curricular activities.
  - Female students versus male students
3. What are the benefits of fees?
4. Would certain courses, programs or extra-curricular activities have to be discontinued if revenues from fees were abolished?
5. How would that affect the quality of education that students receive?
6. What are some of the social/psychological factors of students fees?
7. What are the disadvantages of charging and levying fees?
  - e.g. Vocational/technical programs
  - Physics, Chemistry, English, Biology etc.
  - Music tuition and instruments
  - Fine Arts
  - Physical education
  - Field trips
  - Transportation
  - Rental of school textbooks etc.

#### D. Factors Influencing Fee Policy

- 1 .What has been the trend over the past ten years with school fees?
2. Are fees necessary? Why or why not?
3. Are you aware of a Ministry and/or District policy on curricular and extra-curricular fees and what the nature of that policy is?
4. What are the factors driving these policies and practices?

## Teacher Interview Schedule

### A. Fee Practices

1. What programs, activities and materials do students pay for or supply in your subject area?
2. What are the charges?
3. When were these fees introduced?

### B. Collection and Application Processes

4. How is the fee determined?
5. Described the process by which course fees are set and applied.
6. Who is responsible for establishing, collecting and dealing with difficult cases?
7. What difficulties do you experience in dealing with fees?
8. What strategies are used to effectively cope with any difficulties?
9. Is there general agreement or disagreement among your colleagues about imposing fees?

### C. Effects of School Fees

10. Are certain groups of students affected more by fees than others?
  - Those in academic versus those in non-academic programs
  - Athletic students and students involved in many extra-curricular activities
  - Female students versus male students
  - Students of different ethnic backgrounds, etc.
11. What are the benefits of fees in your subject?
12. What are some of the disadvantages of fee charges?

Appendix G

Letter Attached to Interview Transcripts

Department of Administrative Adult and Higher Education  
Faculty of Education  
2125 Main Mall  
UBC, Vancouver  
B.C.  
V6T 1Z4

27-11-92

Principal  
Secondary School  
British Columbia

Dear \_\_\_\_\_

I have attached a copy of the transcript of our taped interview about school fees in your school which was conducted earlier this year. If you believe that the interview as it appears here misrepresents the accuracy of anything you said at that time, make the necessary changes to better reflect that accuracy. If you wish to make any modifications to the transcript for the sake of clarification, do so as speedily as possible and return it to me.

Where appropriate, brief quotations, paraphrases, and summaries from the transcript may be incorporated into the body of the research report. However, be assured that your identity will remain anonymous and that the content of the interview will be treated with the utmost confidentiality.

I shall assume that the document represents an accurate record of our interview if I do not receive word from you within two weeks. I may be reached at the above mailing address and at telephone number (306) 773-2556. Thank you very much for your assistance in the past.

Sincerely,

Claudette Bouman

Appendix H

List of Relevant School and School District Documents

## List of School and School Districts Documents

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District School	Titles of Documents
<u>Merritt District</u>	
	A Brief Concerning Recent Changes to the Funding of In-School Correspondence Students by Tom Lownie.(1991).
	Merritt Secondary School Course Planning Guide Book 91-92.
	School District No 31 Policy 1-2: Fees to Students.
<u>Richmond District</u>	
	Matthew McNair 1992-93 Program Planning Guide.
	Matthew McNair Secondary School Newsletter 1991-1992.
	Richmond Senior Secondary School Course Selection Manual 1991-1992.
	School District No. 38 (Richmond).
	School District No. 38 (Richmond), B.C. International Students 1992-93".
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<u>Vancouver District</u>	
	Britannia Secondary School Course Description 1992-93.
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	Gladstone Secondary School Course Descriptions.
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	John Oliver Secondary School Vancouver, B.C. Course Descriptions 1992-1993.
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	Sir Winston Churchill Secondary School: Agenda Book. 1991-1992.
	Tech Course Outlines 1992.
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## Appendix H Cont'd

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District School	Title of Document
	Vancouver School Board Summer Experience '91. 1991-1992 Preliminary Budget: Instructional Supplies Budget. Vancouver School Board. 1990-1991 Final Budget: Instruction Supplies Budget Vancouver School Board.
	<u>New Westminster District</u> New Westminster School District #40 International Education Program. New Westminster Secondary School Course Selection 1991-1992. New Westminster Secondary School Fee Schedule 1991.
	<u>Coquitlam District</u> Terry Fox Senior Secondary Course Calendar 1991-1992. Terry Fox Senior Secondary "General School Fees.
	<u>Greater Victoria District</u> Greater Victoria School District: Pupil Fees - Supplies/Materials/Activities. Reynolds School Fees Schedule 1991/92. Welcome to Reynolds: Calendar of Courses 1992-1993. Information and Registration Guide 1991-92: Mount Douglas Senior Secondary School. Victoria High School Calendar 1992-1993.
	<u>Gulf Islands District</u> Ministry of Education Distance Learning Guidebook 1991-92.

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Appendix I

Range of Curricular School Fees by Subject and District

## Range of Curricular School Fees (in CDN \$) by Subject and District

Subject	Merritt	Richmond	Vancouver	New Westminster	Coquitlam	Greater Victoria	Gulf Islands
PE 11	--	--	--	--	15	10-40	--
PE 12	--	35	0-40	50	30	25-50	--
PE (Fitness)	--	--	--	--	10	--	--
Foods 11	12	--	9-10	8	10	12-46	--
Foods 12	15	--	9-10	8	10	12-46	--
Textiles 11	5	--	5-100	8	12	5	25-80
Textiles 12	5	--	20-100	--	5-12	5	20
Art & Craft	--	--	--	--	--	10	25-80
Woodwork 11	--	20-500	6-120	--	--	10-600	10-50
Woodwork 12	--	40-1000	6-120	--	--	10-600	10-100
Constr. 11	10	20-500	6-120	--	--	10-600	10-100
Constr. 12	10	20-500	--	--	10	10-20	10-50
Metalwork 11	10	--	5-50	--	10	7-10	--
Metalwork 12	10	--	5-50	10	10	10-12	--
Mechanics 11	10	4-8	5-8	--	10	10-20	--
Mechanics 12	10	4-8	5-8	--	20	10-20	--
Drafting 11	5	--	--	--	10	10	--
Drafting 12	5	--	--	5	10	3	--
Electron. 11	--	20-500	--	--	--	20	--
Electron. 12	--	20-500	225-260	--	--	20	--
Com. Sci. 11	5	--	5	5	10	3-10	--
Com. Sci. 12	5	--	5	--	10	5-10	--
Art 11	5	--	10	8	10	5-10	--
Art 12	10	--	10	8	10	5-10	--
Photography	--	--	20	20	--	--	--
Ceramics	--	--	8	8	--	--	--
TV & Film	--	--	--	--	20	--	--
Music	--	--	--	5-10	10-80	10-50	--
Accounting 11	15	15	15-20	5	15	4-10	--
Accounting 12	15	15	15-20	5	15	5-10	--
Financial Accounting	--	--	20	--	--	10	--
Data Processing	5	--	--	5	8-12	6-10	--
Office							

cont'd

## Appendix I Cont'd

Subject	Merritt	Richmond	Vancouver	New Westminster	Coquitlam	Greater Victoria	Gulf Islands
Procedures	5	--	--	--	--	--	--
Graphics	--	--	--	--	--	10	--
Information							
Management 11	--	--	--	5	8	4-10	--
Information							
Management 12	--	--	--	5	12	10	--
Marketing 11	--	--	--	--	6	--	--
Marketing 12	--	--	--	--	8	--	--
Business							
Management	--	--	--	--	--	3-10	--
Science &							
Technology	--	--	--	--	12	10	--
Law	--	--	--	--	10	--	--
Tourism	--	--	5	--	--	--	--
Hair-dressing	--	--	275	--	--	--	--
Art Careers	--	--	--	--	--	10	--
Leadership	--	--	10	--	--	--	--

Data provided by school personnel.