

The EFI Calculator requires the following descriptions for primary and secondary education policy:

- 1.) In many countries, regions like states and provinces have the primary responsibility for governance and funding policy for primary and secondary education. If that is the case for your country, please enter the information described below, by region, not for the country as a whole.
- 2.) In your currency, the Annual Per Pupil Public Funding of the Traditional Public School System is _____.
- 3.) In your currency, an *Estimate* of the Average Annual Per Pupil Subsidy funding for users of independent schools (but not chartered public schools) is _____. Include funds from private sources (philanthropy, charity, ‘scholarships’).
- 4a.) Eligibility Coefficient (as a decimal) _____, the limit on eligibility for subsidies averaging the amount you entered for #3, above. For example, in Milwaukee, Wisconsin (USA), based on family income, approximately 25% (0.25 as a decimal) of schoolchildren are eligible for a tuition voucher (subsidy for private school users). If all schoolchildren are eligible for the subsidy for private school users, enter 1.0.
- 4b.) Public-Private Co-Payment Policy: _____% (as a decimal; 50% = 0.5) of subsidy-eligible independent school users may supplement subsidy money with personal funds. For example, co-payment permission may be limited to schooling for older children. Entering 1.0 means that all subsidized private school users may co-pay.
- 4c.) Co-Payment (Shared Financing) Cap: the subsidy-eligible families face a _____% tax (as a decimal; 50% = 0.5) on the private share of tuition co-payments. No tax on co-payment spending, enter 0.
- 4d.) Co-Payment Taxation: the subsidy-eligible families face a _____% tax (as a decimal; 50% = 0.5) on the private share of tuition co-payments. So, if a school charges a \$2000 co-payment, and the Co-Pay tax is 10%, the parents must write a check for \$2200 to pay the \$2000 co-payment.
- 4e.) Parents’ Mandatory Minimum Share of Independent School Tuition is _____. Enter 1.0 if there is no subsidy funding for private school users. Enter 0.0 if there is no minimum.
- 5a.) In ‘your place’, there are _____ school districts (or equivalent – local/regional school operators, such as LEAs, of at least groups of traditional public schools).
- 5b.) In ‘your place’, the approximate enrollment share (as a decimal) of the four largest private school firms (or churches) is _____.
- 6.) The aim of this question is to gauge potential rivalry among public providers of schooling.

School district (or ‘LEA’) enrollment in you place is:

about the same size

very similar

highly variable, but none significantly larger than the vast majority

highly variable, but a few significantly larger than the rest

very similar, but a few significantly larger than the rest

Ponder, perhaps research the basis for these subjective judgments:

7.) Rate the formal barriers to private school start-up. Do not consider subsidy discrimination. Do consider issues such as permit/registration requirements, costly facility rules, ownership restrictions (profit?, churches?), advance proof of demand, assurance bond?, location restrictions, must have permission of local public school authorities?

- Prohibitive
- Onerous
- Moderate
- None

8.) Rate the formal barriers to start-up and competitiveness of independent or chartered public schools (CPS). If 'your place' does not allow CPS, click 'prohibitive'. Consider issues such as personnel decision and instruction content autonomy, permit/registration requirements, costly facility rules, ownership restrictions (profit?, churches?), advance proof of demand, assurance bond?, location restrictions, must have permission of local public school authorities?, start-up/planning funding?, operating funding disparity between CPS and traditional public schools, potential for selective admissions, extensiveness of waitlists??

- Prohibitive
- Onerous
- Moderate
- None

9.) Degree of Traditional Public School Choice:

- Only by Choice of Residence
- Just Between Schools in Different Districts, Needing Permission of Sending and Receiving District and District-Levied Tax Funds do not Follow
- Between Schools in Same or Different Districts, Needing Permission of Sending and Receiving Schools and District-Levied Tax Funds do not Follow
- Just Between Schools in Different Districts, Needing Permission of Just the Receiving District; District-Levied Tax Funds do not Follow
- Just Between Schools in Different Districts, Needing Permission of Just the Receiving District; Full Per-Pupil Funding Follows
- Just Open Enrollment within Districts, All Funds Follow
- Open Enrollment Among all Traditional Public Schools, All Funds Follow

10.) What percent of children enrolled in traditional public schools (as a decimal) are eligible for the public school choice available as described in #9? _____.

For example, eligibility may be limited to children in formally designated 'Failed Schools' or below a certain income threshold. Estimate that pct.

11.) Traditional public school teacher credentialing rules:

- Education Degree, Plus Multi-Year, Specific Training Credential Required
- Education Degree, Plus 1-Year, Specific Training Credential Required
- Education Degree or any 4-yr College Degree, Plus 1-Year, Specific Training Credential Required
- Any 4-yr College Degree, Plus Background Check, Required
- Public Schools Can Hire Anyone that Passes a Rigorous Background Check

12.) Rate the formal barriers to traditional public school (TPS) principal autonomy. Consider issues such as hiring/firing, budget allocation, curriculum/textbook choice.

- Prohibitive
- Onerous
- Moderate
- None

13.) Rate the formal barriers to private school autonomy. Consider issues such as hiring/firing by private school principals, minimum personnel qualifications, permission to exercise mission-based selective admissions, curriculum/textbook choice, regulation of homeschooling, ownership (churches?, for-profit firms?), mandated participation in standardized testing?

- Prohibitive
- Onerous
- Moderate
- None

Uncertainty Issues:

14.) Frequency/credibility of legislative and judicial challenges to key legislation.

- Frequent, Credible Challenges
- Infrequent, Credible Challenges
- Few Challenges; Most Key Issues Settled and Consistently Applied Over Time
- Relative certainty that Key Policies Underpinning Demand for Traditional Public School Alternatives (Funding and Governance Issues) are Secure

15.) Please rate miscellaneous regulation issues. Consider issues such as reporting/compliance paperwork, regulation of library holdings, regulation of staffing levels, and staffing roles, regulation of credentials of non-teachers.

- Prohibitive
- Onerous
- Moderate
- None

Information System Issues:

16.) Availability of Useful Information About Schools:

- Only Available Informally (Talking to People)
- Some Insightful Published Data Exist
- Substantial Insightful Published Data Exist
- Extensive Network of Private and Government Providers of Information About the Schooling Options