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# SCHOOLING SATISFACTION

Arizona Parents' Opinions on Using  
Education Savings Accounts

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Jonathan **Butcher** and  
Jason **Bedrick**, M.P.P.

OCTOBER **2013**

Friedman  
Foundation

*For  
Educational  
Choice*

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## Executive Summary

Thousands of families across the country, in states like Florida, Ohio, Indiana, and Wisconsin, are using school vouchers to access private schools for their children. Thousands more in other states, like Pennsylvania, Iowa, and Georgia, are choosing private schools using scholarships awarded by organizations that accept donations from individuals and businesses, which, in turn, receive tax credits for their financial support.

However, Arizona's education savings accounts (ESAs) are on the leading edge of school choice, encouraging greater innovation in American education. Whereas parents and families normally use vouchers and tax-credit scholarships to decide where their children attend school, Arizona parents use ESAs to determine where and how their youngsters are educated.

Under Arizona's plan, designed by the Goldwater Institute in 2005 and enacted in 2011, the state awards eligible families 90 percent of their children's per-student public funding, based on a state formula. The Arizona Department of Education deposits the money in a private bank account that parents control with a use-restricted debit card. Because account spending is flexible, parents can buy textbooks, hire a tutor, enroll their children in online classes, pay private school tuition, or even save for future college expenses.

The only children eligible for an account in the 2011–12 and 2012–13 school years were children with special needs. In 2013, students in Arizona public schools graded D or F became eligible to apply, along with children in military families, and youth adopted from the state foster care system. New applicants must have attended a public school for at least 100 days in the prior school year. Today, some 200,000 Arizona children are eligible—nearly one in five public school students.

This paper examines results from the first survey of parental satisfaction among ESA families, and the survey is the first to ask how families would like ESAs to change. This paper also provides the first demographic data for a sample of participating families and details about how families are using the

accounts. The Arizona Department of Education does not gather demographic information from applicants, and, as a result, no descriptive data are available to researchers. This paper is the first research effort to describe the types of families who are using education savings accounts.

To gather this sample of ESA families, between April 9 and May 22, 2013, we sent an e-mail survey to the 179 parents registered to use a Yahoo! message board that ESA parents created in 2011 to exchange information.<sup>1</sup> The number of families who signed up to use the message board is more than half of the total number of ESA families in 2012–13.<sup>2</sup> Survey results should be interpreted with caution because families in the sample chose to join the message board and answer the survey; they were not randomly selected. This self-selection means the results cannot accurately be applied to all ESA families; however, because the number of families using the message board is more than half of the total number of participants, the results represent a reasonable sample of ESA families. The survey results provide an accurate indication of how ESA families who communicate on the message board are using the accounts, and the demographic data are an accurate reflection of the families that use the Yahoo! message board as a resource for choosing among different educational services. Parents' flexibility to choose among educational providers such as schools, personal tutors, educational therapists, and online classes is a unique feature of ESAs.

Our survey participants represent children in every grade from kindergarten to ninth grade, as well as students in grades 11–12 (no respondents reported that their child was currently in 10th grade). Our survey collected information from parents of children with a range of special needs, the only children using the accounts in the first half of 2013. In addition, results represent families from different household income levels. Responses to questions of how satisfied parents are with ESAs and how they spend their account funds are consistent with other data available on these topics. Although the survey results may not be reflective of all ESA families, our sample has similarities to existing research on ESAs.

## Key findings:

- Parents using an ESA are more satisfied with their children's current education compared with their previous public school: The majority of respondents reported being "very satisfied" with the accounts (71 percent); 19 percent reported being "satisfied"; and 10 percent said they were "somewhat satisfied." No parent responded as neutral or reported any level of dissatisfaction with the accounts. Those results show high levels of satisfaction even after accounting for our limited sample size and margin of error.
- Parents in this sample are taking advantage of the accounts' flexibility to meet their children's unique needs: 65 percent of respondents reported using account funds for private school tuition; 33 percent used their accounts for homeschool curriculum; 33 percent used funds to hire a tutor; 41 percent purchased education therapies; and 17 percent used the accounts to buy textbooks. Twenty-seven percent—nearly one-third—of respondents used an ESA for homeschool materials and did not report spending any money on private school tuition.
- Most parents reported using personal funds to pay for their children's education in addition to ESA funds. Though 24 percent reported not spending any additional funds, 29 percent of respondents spent \$101–\$500 in personal funds; 15 percent spent \$501–\$1,000; 12 percent spent \$1,001–\$2,500; 5 percent spent \$2,501–\$5,000; and 11 percent of respondents spent more than \$5,000.

an ESA, parents control their children's education funds, and evidence shows families spend account funds on more than just private school tuition—in some cases, they do not use the account to pay tuition at all.

The Arizona Education Association and Arizona School Boards Association are suing to take the accounts away from Arizona children and their families. Opponents claim the accounts are the same as school vouchers, which the Arizona Supreme Court ruled unconstitutional in 2009. This survey provides evidence that the accounts are, in fact, distinctly different from vouchers or tax-credit scholarships. With a voucher or scholarship, a state agency or scholarship organization pays a private school upon the parent's selection. With

## Introduction

Michael and Amanda Howard knew their son, Nathan, had unique learning needs, and they wanted to provide him the best educational opportunities they could find. Before Nathan entered preschool in Arizona, doctors diagnosed him with autism. He also struggled with a speech delay. Michael and Amanda knew preschool would be a challenge, but they found a preschool and teacher responsive to Nathan's needs.

When Nathan entered kindergarten the next year and enrolled in a class with 30 other children, things deteriorated rapidly. "He gets overstimulated in noisy areas," Amanda explained, "and he needs so much one-on-one attention because he cannot process background noise like others can." Nathan simply did not fit in, so Michael and Amanda began looking for ways to help their son.

Fortunately for the Howards, Arizona offers the most innovative and flexible education solution in the country: education savings accounts (ESAs) or Empowerment Scholarship Accounts.<sup>3</sup> Those accounts allow Michael and Amanda to use 90 percent of Nathan's state funding, deposited in a bank account that functions much like a Health Savings Account (HSA). The Howards use a use-restricted debit card to make transactions, such as paying tuition at Nathan's new school. However, ESAs allow for much more than just school choice. Parents can use the accounts to pay for education therapies, such as speech therapy, online classes, personal tutors, and textbooks. Families can even save funds from year to year and deposit unused money in a college savings plan.

This paper is the first report on parent satisfaction with ESAs, providing a sample of ESA families and the ways in which they are using the accounts. The Arizona Department of Education does not gather demographic information from applicants, so no such data are available to researchers. In addition, the Arizona Department of Education put a moratorium on fulfilling data requests in March 2013, so the

only way for researchers to gather information from participating families was to conduct a survey.<sup>4</sup>

ESAs are distinctly different from existing school choice alternatives. Thousands of families across the country, in states like Florida, Ohio, Indiana, and Wisconsin, are using school vouchers to access private schools for their children. Thousands more in other states, like Pennsylvania, Iowa, and Georgia, are choosing private schools using scholarships awarded by organizations that accept donations from individuals and businesses, which, in turn, receive tax credits for their financial support.

However, children as unique as Nathan live all over the country and sometimes need educational or physical therapies and other specialized services outside of traditional schools, public or private. Others may need more help learning to read than their teacher can provide during the school day. Some children have outpaced their peers and would benefit from one-on-one tutors to get further ahead. Parents can use ESAs to create those opportunities in education that are as unique as their children are.

Arizona lawmakers launched ESAs in 2011, making only children with special needs eligible to apply. In fall 2011, 75 children enrolled, but participation doubled to 150 children by the end of the school year. The number of children with an account doubled again in the 2012–13 school year to 302.<sup>5</sup> In 2012, Gov. Jan Brewer and the Arizona legislature expanded eligibility for ESAs to include children from underperforming public schools, along with children in military families, and youth adopted from the foster system (children in those categories were eligible to apply beginning in January 2013).<sup>6</sup> Eligible children also must have attended a public school for at least 100 days in the prior school year. In 2013, state lawmakers expanded the eligibility provisions again so that incoming kindergarten students do not have to attend a public school before applying for an ESA. Again, incoming kindergarteners must meet the existing eligibility requirements to apply (have special needs, are assigned to failing schools, came from military families, or are adopted from the state foster care system).<sup>7</sup>



## What is an Education Savings Account?

ESAs are bank accounts that parents use for education expenses for their children. The accounts function much like HSAs. But instead of using the funds for doctors' visits or medication, parents can use the bank account and accompanying debit card for:

- private school tuition;
- textbooks;
- educational therapies such as speech therapy;
- tutoring services;
- curriculum, including books and other materials such as counting blocks used for homeschool materials;
- online classes;
- standardized test fees;
- college savings plans;
- college tuition and fees; and
- discrete public school classes and extracurricular activities.<sup>8</sup>

Parents can even use online payment services such as PayPal to make those purchases. The Arizona Department of Education deposits 90 percent of the state's portion of a child's per-student funding in his or her parents' ESA account. Total per-student funding in Arizona comes from state, local, and federal sources; the state portion is approximately \$3,800. When local and federal sources are included, average per-student funding in Arizona was \$9,233 in 2011.<sup>9</sup> Arizona funds students with special needs using a weighted formula based on a child's needs, making their total account award larger than the base funding amount from the state. For example, the Arizona Department of Education assigns a child diagnosed with autism a funding weight of 6.024.<sup>10</sup> When multiplied by the state's base-funding portion (\$3,800), the child's total award amounts to \$22,891. Ninety percent of that figure is \$20,602, which the department separates into quarterly disbursements for the ESA. The child in this example would receive approximately \$5,000 at the beginning of each fiscal quarter. Adopted children and those in failing schools or military families are not funded using the same weighted system. Their account

awards would be 90 percent of the base amount from the state funding formula, or approximately \$3,000. In 2013, Arizona lawmakers increased the base funding amount for all ESA students to approximately \$5,300.<sup>11</sup>

Arizona parents have used ESAs for a wide range of services, including horseback riding therapies for children with autism who struggle with balance, iPad apps to supplement math and reading instruction, and art curriculum materials to be used in a homeschool program.<sup>12</sup> Parents keep the receipts from each purchase and must send the paperwork to the Department of Education before the next quarterly disbursement. The department audits the accounts prior to each deposit to ensure parents have spent their funds on the qualifying educational expenses previously listed.<sup>13</sup>

Children applying for an ESA the first time must have attended a public school for 100 days in the prior school year, but, as mentioned previously, incoming kindergarten students that meet the other eligibility requirements are automatically eligible. In addition, parents of a child with special needs must update his or her Multidisciplinary Evaluation Team (MET) report and/or Individualized Education Plan (IEP) to remain eligible for an account. METs must be renewed every three years; IEPs are renewed annually.

In 2011, the Arizona Education Association (AEA) and Arizona School Boards Association (ASBA) sued to take the accounts away from Arizona children and their families.<sup>14</sup> Opponents claim the accounts are the same as school vouchers, which the Arizona Supreme Court ruled unconstitutional in 2009.<sup>15</sup> Yet ESAs are designed to be different from vouchers. With a voucher, the state pays a private school upon a parent's selection. With an ESA, the state contracts with parents to provide their children with an education. Parents control the accounts and determine how and where the funds are spent. Thirty-eight states, including Arizona, have constitutional provisions that prohibit the public funding of religious institutions (including compelled support clauses or the historically anti-Catholic constitutional provisions commonly known as "Blaine Amendments").<sup>16</sup> Unions and education associations have cited those provisions in their lawsuits when

attacking families' freedom to choose in education. Opponents have challenged voucher programs in Ohio, Indiana, and Wisconsin and failed, but succeeded in Arizona using those constitutional clauses.<sup>17</sup>

In January 2012, Maricopa County Superior Court Judge Maria Del Mar Verdin ruled the accounts constitutional in Arizona, saying, "The exercise of parental choice among education options makes the program constitutional."<sup>18</sup> The AEA and ASBA appealed, and the Arizona Court of Appeals is considering oral arguments delivered on February 13, 2013. A decision is expected in late 2013.

## Arizona Department of Education Customer Satisfaction Survey

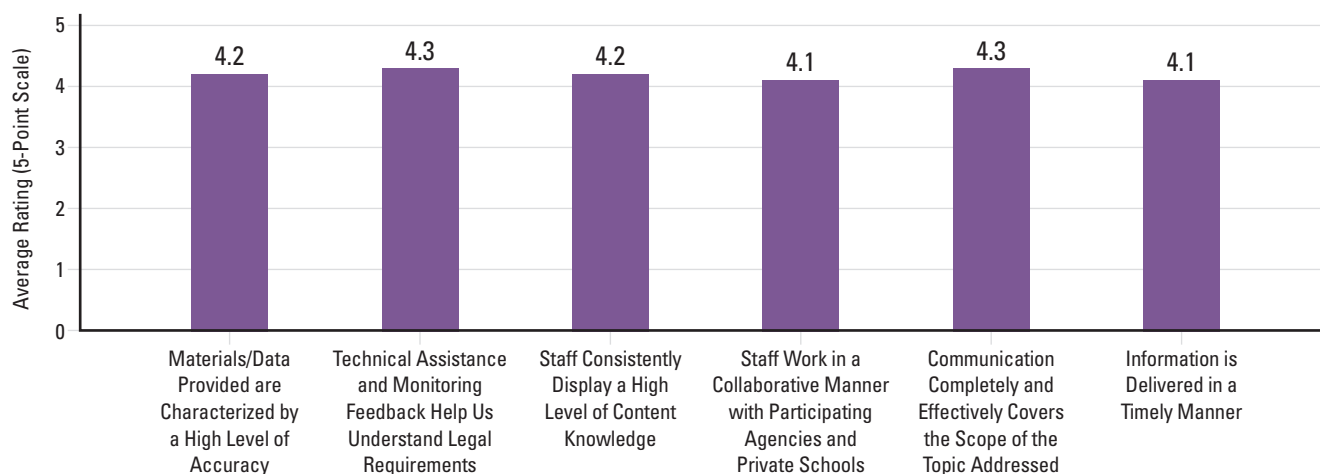
In 2012, the Arizona Department of Education conducted one survey of ESA parents to measure their satisfaction with the department's services in administering the accounts.<sup>19</sup> The survey did not ask for parents' overall satisfaction with the accounts nor did it ask for any descriptive information. Only 32 families responded (fewer than half the size of the sample in the survey we conducted), but the results indicate families are satisfied with how the department is administering the accounts.

On average, parents gave the department a "4" or higher on a scale of 1–5 to each of the department's questions on the survey (Figure 1), allowed responses being Strongly Agree (5), Agree (4), Somewhat Agree (3), Disagree (2), and Strongly Disagree (1). Critically, parents indicated the department was communicating adequately the rules and regulations for using the accounts. The department earned an average score of 4.3 from parents on the subject of "Communication completely and effectively covers the scope of the topic addressed," and parents gave the department an average score of 4.3 on the subject of "Technical assistance and monitoring feedback help us understand legal requirements." ESA families gave the department 4.2 out of 5 in terms of "Overall Satisfaction" with customer service (Figure 2). Again, the department used a 5-point scale for the "Overall Satisfaction" question: Outstanding (5), Above Average (4), Average (3), Needs Improvement (2), and Poor (1).

## Other Surveys on School Choice and Education Savings Accounts

The Friedman Foundation for Educational Choice has conducted surveys on parent satisfaction with school choice and registered voters' desire for more educational options in their respective states. In May 2013, the

**FIGURE 1** Arizona Department of Education Customer Satisfaction Ratings: ESA Parents



Source: Arizona Department of Education, "Empowerment Scholarship Account Customer Satisfaction Survey," (Dec. 2012), <http://www.azed.gov/esa/files/2012/12/esa-survey.pdf>.

**FIGURE 2** Arizona Department of Education Survey: Overall Parent Satisfaction with the Department's Customer Service



Source: Arizona Department of Education, "Empowerment Scholarship Account Customer Satisfaction Survey," (Dec. 2012), <http://www.azed.gov/esa/files/2012/12/esa-survey.pdf..>

Friedman Foundation conducted the "Schooling in America Survey: What Do Mothers Say About K-12 Education?" and found that mothers with children in school are more likely than other adults without children in school to favor charter schools (independent public schools that enroll any child that applies, subject to space), tax-credit scholarships, vouchers, and ESAs.<sup>20</sup>

In its national survey, the Friedman Foundation found that 64 percent of American adults and 65 percent of mothers of school-aged children favored ESAs and 25 percent opposed them.<sup>21</sup> Residents in the Northeast and Midwest were more likely to favor the accounts (71 percent and 69 percent, respectively), whereas 68 percent of suburban and small-town residents there supported ESAs. Among Westerners, 55 percent favored ESAs.

The Friedman Foundation also has conducted surveys of registered voters' opinions on K-12 education and school choice in 18 states, including Alaska, Idaho, Maine, Montana, New Mexico, North Carolina, North Dakota, Tennessee, Texas, and Washington.<sup>22</sup> The surveys in those states asked voters a variation of this question:

An "education savings account" allows parents to withdraw their child from a public district or charter school and receive a payment into a government-authorized savings account with restricted, but multiple, uses. Parents can then use these funds to pay for private school tuition, online education

programs, private tutoring or save for future college expenses. In general, do you favor or oppose this kind of "savings account system"?

Without exception, survey respondents responded strongly in favor of ESAs (Figure 3, next page).

The Friedman Foundation also surveyed Florida parents whose children participated in the state's corporate tax-credit scholarship program. Again, researchers found high levels of parent satisfaction.<sup>23</sup> In Florida's tax-credit scholarship system, businesses receive a dollar-for-dollar tax credit for their donations to organizations that distribute private school scholarships. The tax credits statewide were capped at \$229 million in 2012–13. That figure increases when donations reach 90 percent of the maximum. Eighty percent of survey respondents reported being "very satisfied" with their children's academic progress in the private schools they attended using scholarships. Seventy-six percent were "very satisfied" with the teacher quality, 76 percent were "very satisfied" with "schools' responsiveness to their needs," and 62 percent were "very satisfied" with student behavior in their child's current school.

In 2010, the National Center for Education Statistics at the U.S. Department of Education released results from a telephone survey on school choice conducted in 2007. The study, which updated findings from similar surveys conducted between 1993 and 2003, found that parents who were able to choose a school for their children—public or private—were more satisfied with their education (Figure 4, page eight).<sup>24</sup>

Other researchers have measured parent satisfaction and recorded participants' demographic information in school choice programs by conducting focus groups. The School Choice Demonstration Project (SCDP) based at the University of Arkansas conducted multi-year analyses of children using vouchers in Washington, D.C., and Milwaukee, Wisconsin.<sup>25</sup> Though ESAs have important elements that distinguish them from vouchers, school vouchers are still the school choice alternative most closely resembling education savings accounts, making SCDP's findings useful for comparison with the findings from ESA families. In the District of Columbia's

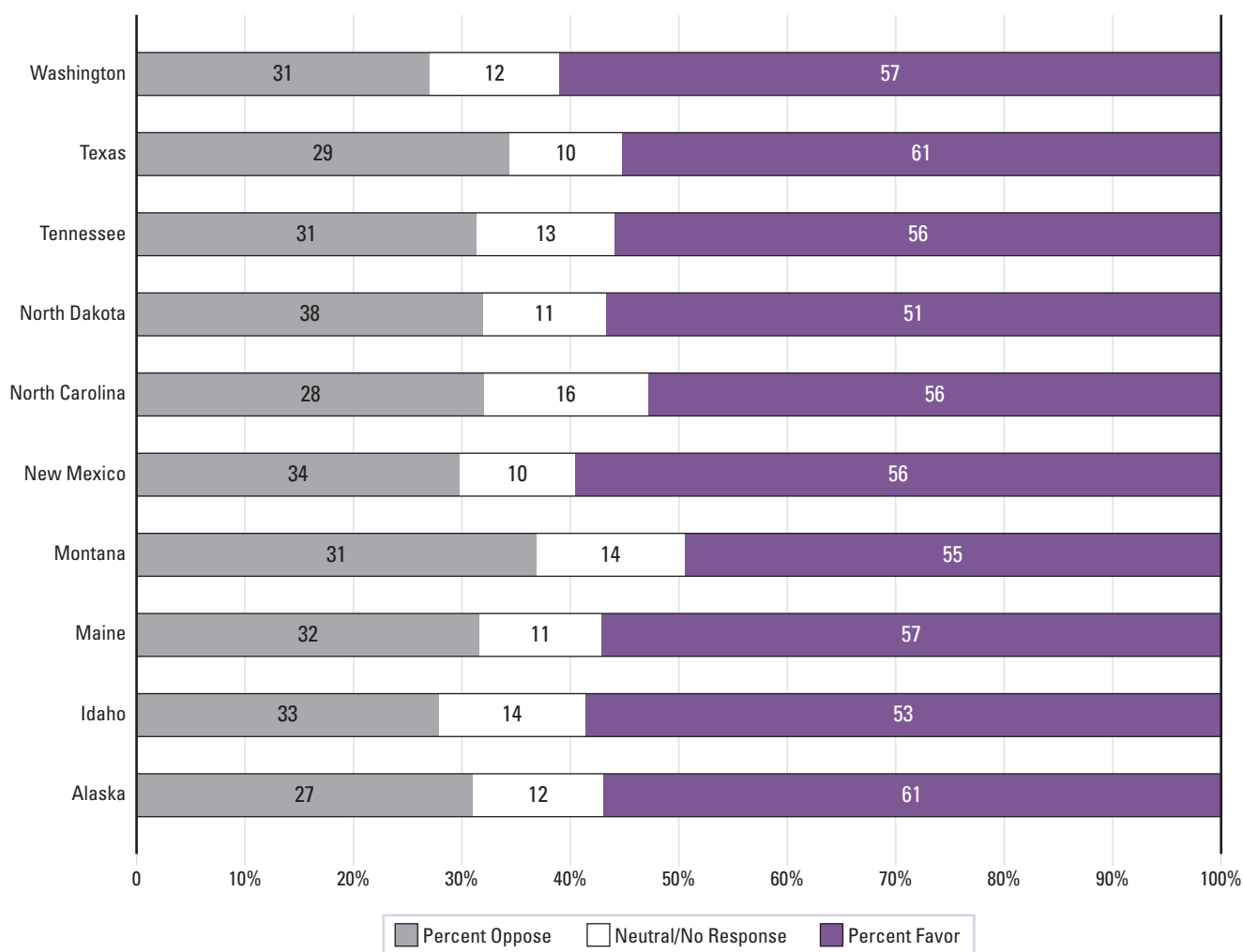
Opportunity Scholarship Program (OSP), 23 out of 31 respondents agreed with the statement “my family is very satisfied with the OSP,” and 15 respondents strongly agreed.<sup>26</sup> Milwaukee families were also more satisfied with their children’s school when they could choose where their children attended. In 2009, the SCDP asked parent focus groups in Milwaukee “what discrete factors best explain the families’ satisfaction.”<sup>27</sup> The study found that “families across both sectors appear pleased with what we generally categorize as the school environment and homeschool relationships, specifically their interpersonal relationships with teachers and administrators. Several parents cited satisfaction with

the way the school communicates with them and the timely sharing of information.”<sup>28</sup>

## 2013 Goldwater Institute “Education Savings Accounts Survey” Results

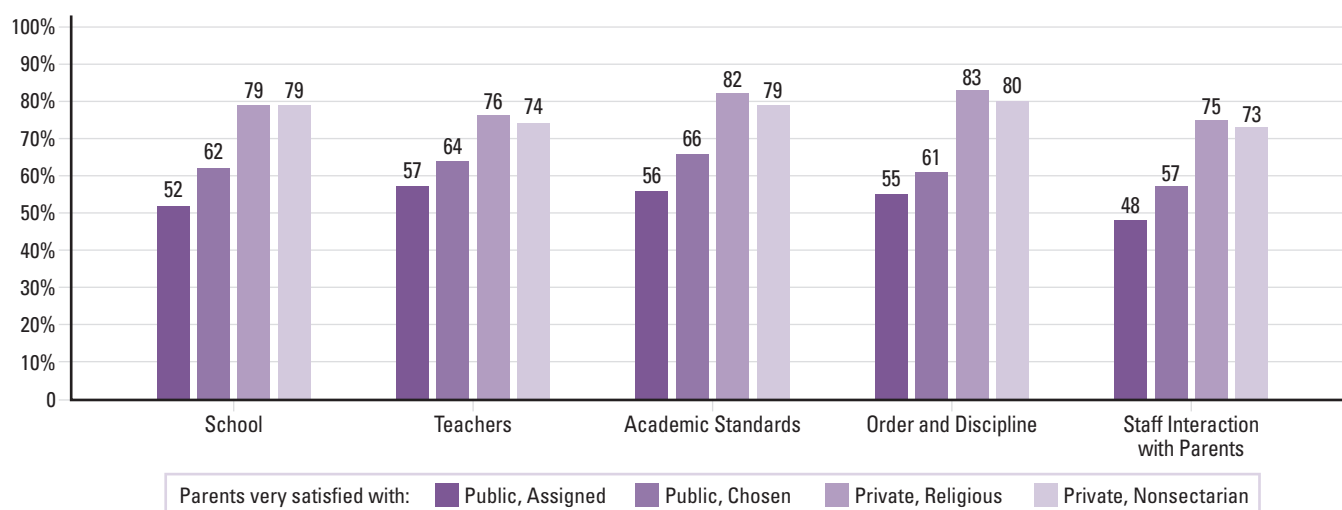
In the “Education Savings Accounts Survey,” commissioned by the Friedman Foundation for Educational Choice and performed by the Goldwater Institute, Kwiksveys.com was used to survey 179

**FIGURE 3** State Survey Results on Education Savings Accounts



Source: Paul DiPerna, *Interstate Survey: What Do Voters Say About Education in Six States?*, Polling Papers 1; *Indiana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 2; *Alaska K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 3; *New Mexico K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 4; *Idaho K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 5; *Washington K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 6; *Louisiana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 7; *Tennessee K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 9; *Montana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 10; *North Carolina K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 11; *Maine K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 12; *North Dakota K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 13; *Texas K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 14 (Indianapolis: Friedman Foundation for Educational Choice, various dates), <http://www.edchoice.org/Research/Our-Studies---Reports.aspx>.

**FIGURE 4** Percentage of Students Enrolled in Grades 3-12 Whose Parents Were Very Satisfied with Various Aspects of Their Children's Schools, by Public and Private School Type: 2007



Source: Sarah Grady, Stacey Bielick, and Susan L. Aud, *Trends in the Use of School Choice: 1993 to 2007: Statistical Analysis Report*, special report prepared at the request of the National Center for Education Statistics, Apr. 2010, p. 30, figure 9, <http://nces.ed.gov/pubs2010/2010004.pdf>.

parents registered for a Yahoo! message board created by ESA families. Parents representing 67 children using ESAs responded to the survey (37 percent). Survey responses were gathered between April 9, 2013, and May 22, 2013. Respondents completed a pre-survey indicating the number of ESA students in their home. Respondents with one child using an ESA were sent a survey asking questions about their child. Those with two or more students using an account were sent a survey asking questions about the oldest and youngest students who are using an account in their home. We combined the results from the single-child and multiple-child surveys as applicable.

Survey results should be interpreted with caution because members of the Yahoo! group are a self-selected population. Their responses and demographic indicators do not necessarily reflect all families using ESAs.

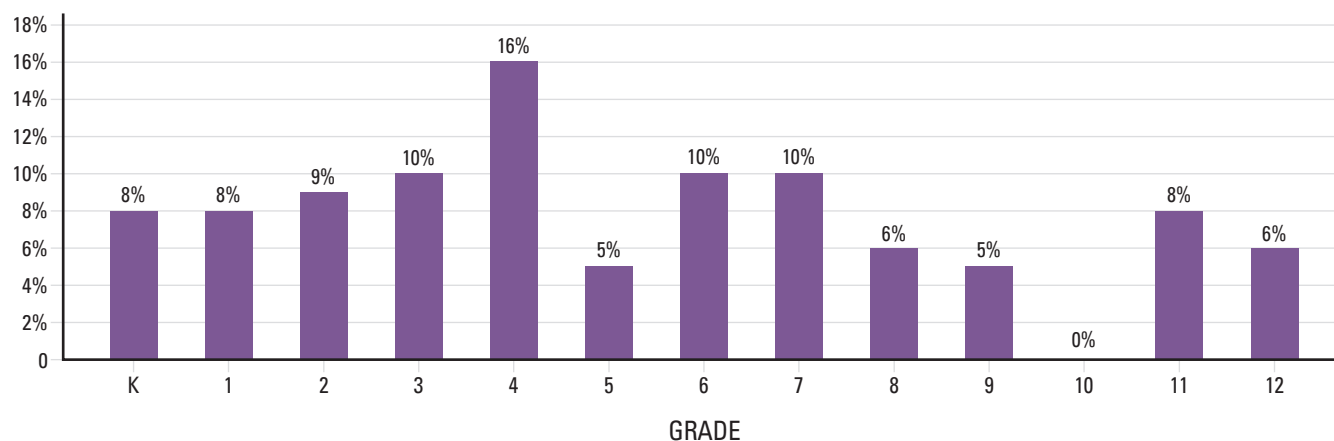
However, as the results to follow indicate, our sample includes ESA students with a range of different characteristics, and parents' responses to questions of how satisfied they are with ESAs and how they spend their children's account funds are consistent with the existing data on these topics. For example, 65 percent of the respondents to our survey report using ESA funds for private school tuition (see Figure 8, page 11). That

figure closely resembles the findings from a Friedman Foundation analysis using Arizona Department of Education data on ESA participant expenses in which the researcher found 66 percent of all ESA families used their accounts for private school tuition.<sup>29</sup> Our survey participants represent children in every grade, kindergarten through 12th grade, except 10th grade (no survey respondents reported that their child was enrolled in the 10th grade). Our survey collected information from parents of children with a range of special needs, the only children using the accounts in early 2013. The results also represent families reporting different household income levels. Although the survey results may not be representative of all ESA families, the findings provide new information on the different kinds of participating families and students, how they use the accounts, and their levels of satisfaction.

## Family and Student Characteristics

Most families in our sample have multiple children living at home, and most of the children in our sample using an ESA were male.



**FIGURE 5** Which Grade Does the ESA Student Currently Attend?

- 72 percent of families surveyed have two or more children living in the home.
- 18 percent have more than one child in their home using an ESA.
- More than two-thirds of the children are male (70 percent). The distribution of male and female ESA students in our sample is similar to Arizona's distribution of children with special needs, as 67.5 percent of the state's children are male.<sup>30</sup>

Among those surveyed, student grade levels varied (Figure 5, note that responses are rounded to the nearest whole number).

- No single grade level accounted for a majority of students. Parents of students of varying ages and grade levels responded to the survey.

Most survey participants report the ethnicity of their child using an ESA as "white."

- 76 percent of the families surveyed reported their child as white; 1.5 percent reported their child's ethnicity as Native American; 1.5 percent reported African American; 12 percent reported Hispanic; 3 percent reported multi-racial/Non-Hispanic; and 6 percent reported "other."

Most respondents live in Arizona's largest county, Maricopa.

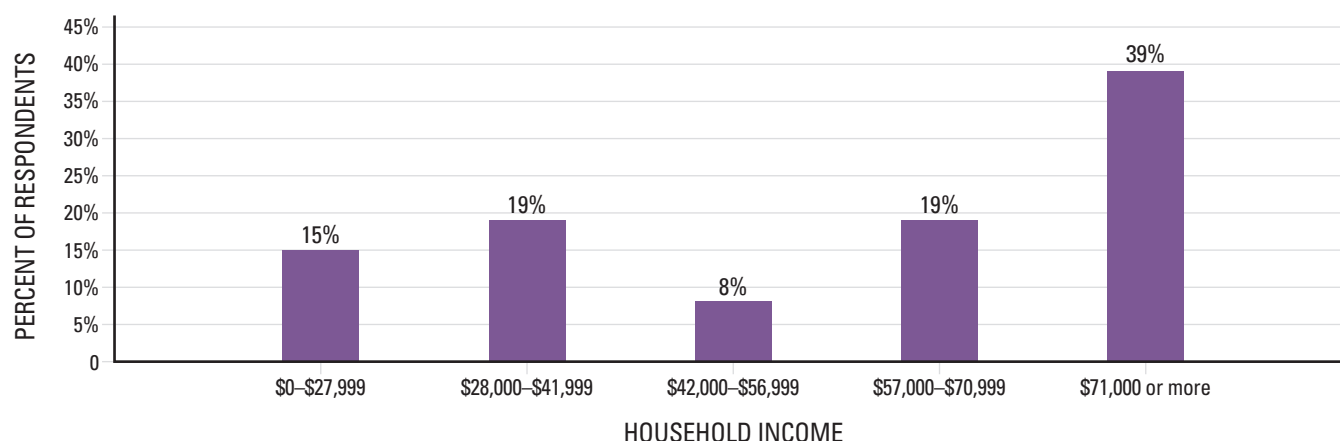
- 85 percent of respondents live in Maricopa County. Maricopa is the largest county in Arizona and includes the cities of Phoenix, Mesa, Scottsdale, Tempe, Chandler, Glendale, and Buckeye. Maricopa County accounts for more than 3 million residents, or 60 percent of Arizona's total population.<sup>31</sup>

Most ESA families report an annual income of \$71,000 or more, but respondents report a range of household income levels (Figure 6, next page).<sup>32</sup>

- 39 percent report an annual income of \$71,000 or more, whereas 15 percent report an annual income of \$27,999 or less, and 8 percent report household income levels between \$42,000 and \$56,999.<sup>33</sup> Arizona's median household income is \$50,752.

Students using ESAs have an array of special needs (Table 1, next page).

- The Arizona Department of Education maintains a list of special-needs categories for families to use in applying for an ESA.<sup>34</sup> The Goldwater Institute survey gave families the list to select from and asked respondents to choose all that apply. The responses represent a wide variety of needs across the spectrum of special-needs categories. The only category not selected at least once was English language learner (ELL). The category most often selected was the designation for "Developmental Delays" (34 percent).

**FIGURE 6** What was Your Family's Total Household Income in 2012?**TABLE 1** ESA Students' Special Needs

| Special Needs                                       | Percent of Survey Responses |
|---|-----------------------------|
| Hearing Impaired                                    | 3.0%                        |
| Multiple Disabilities, in Resource Program          | 19.4%                       |
| Multiple Disabilities, in a Self-Contained Program  | 29.9%                       |
| Multiple Disabilities, Severe Sensory Impairments   | 11.9%                       |
| Orthopedic Impairments, in Resource Program         | 1.5%                        |
| Orthopedic Impairments, in a Self-Contained Program | 6.0%                        |
| Preschool Students with Special Needs               | 3.0%                        |
| Developmental Delays                                | 34.3%                       |
| Emotional Disabilities                              | 6.0%                        |
| Moderate Mental Retardation                         | 4.5%                        |
| Visually Impaired                                   | 4.5%                        |
| Students in Kindergarten, Third Grade               | 4.5%                        |
| English Language Learners                           | 0.0%                        |
| None of the Above                                   | 7.5%                        |

Note: Responses may not total to 100 percent because survey participants could select multiple categories.

from a private school staff member; 19 percent reported a source other than the options listed (see Appendix 3, question 14; response options that no parents selected are not included in Figure 7, next page); 10 percent found the accounts on a government website; 6 percent learned about the accounts from a newspaper article; 5 percent from the Goldwater Institute; and 5 percent from a nonprofit organization such as a church or advocacy group.

For parents that chose “other,” a sample of their responses is below:

- “therapist”
- “autism Yahoo! web group”
- “special education lawyer”
- “online parent support group”

Parents in this survey use ESAs for more than just private school tuition (Figure 8, next page).

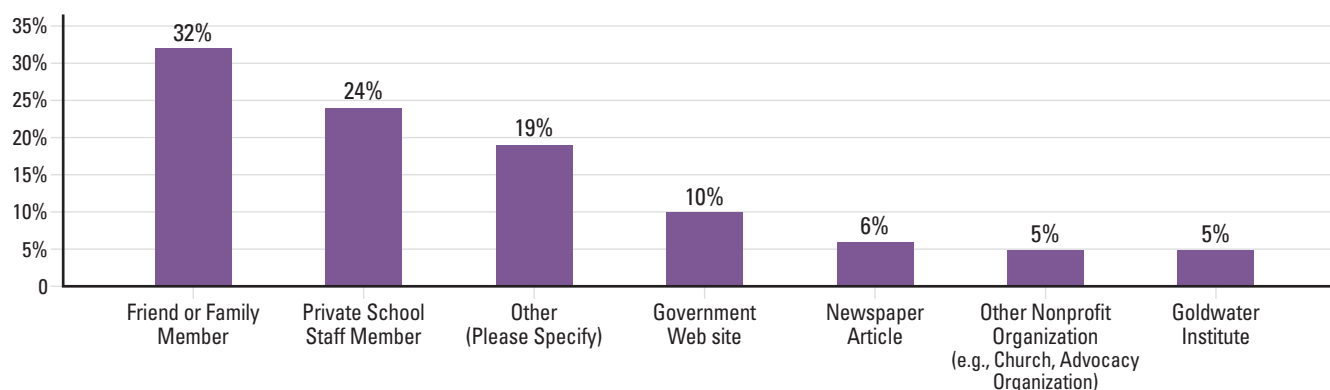
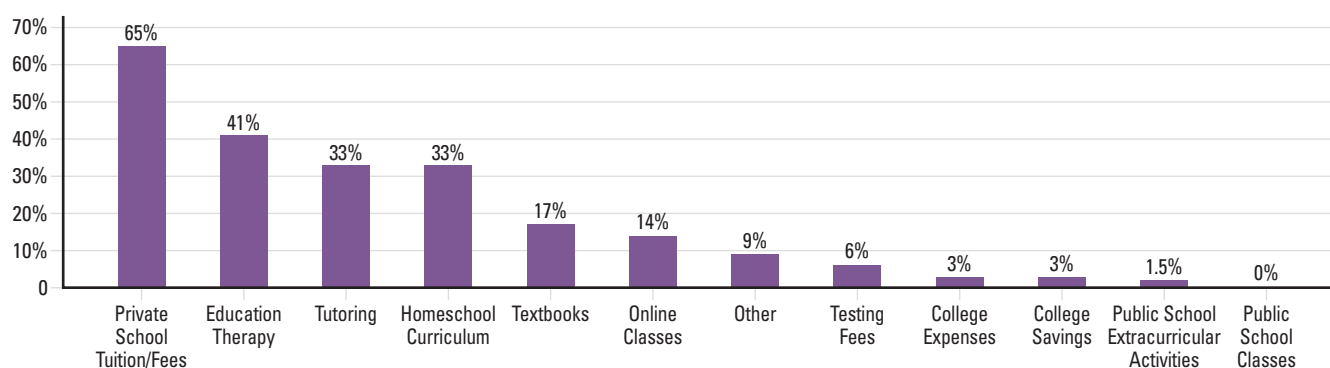
- Whereas 65 percent of respondents reported using account funds for private school tuition, 33 percent used their ESAs for homeschool curriculum, and 33 percent used funds to hire a tutor; 41 percent of those surveyed used funds for education therapies, and 17 percent used the account to buy textbooks.

- 27 percent—nearly one-third—of respondents used an ESA for homeschool materials and did not report spending any money on private school tuition.

## Education Savings Accounts Information, Account Usage

Our sample of families from the Yahoo! message board learned about ESAs from a variety of sources.

- 32 percent of respondents learned about the accounts from a friend or family member; 24 percent learned

**FIGURE 7** How Did You Find Out about the ESA Program?

**FIGURE 8** Different Uses of Education Savings Accounts


Note: Responses may not total to 100 percent because survey participants could select multiple categories.

For parents that selected “Other,” here are some of their responses:

- “karate”
- “AZ Science Center classes”
- “braille and assistive technology”
- “speech therapy, swimming therapy, aide-paraprofessional”

Those responses are consistent with Arizona Department of Education data from November 2011, when the department reported expenses from the first cohort of families to use the accounts:

- \$182,637 on private school tuition;
- \$497 on textbooks;
- \$9,948 for educational therapies;
- \$3,195 for tutoring services;
- \$1,887 for curriculum expenses;

- \$600 on college savings accounts; and
- \$70,972 of the total disbursements had not been spent.<sup>35</sup>

Again, the findings from our survey are also consistent with Friedman Foundation research conducted in 2013, which found that 66 percent of ESA families used the account for private school tuition.<sup>36</sup>

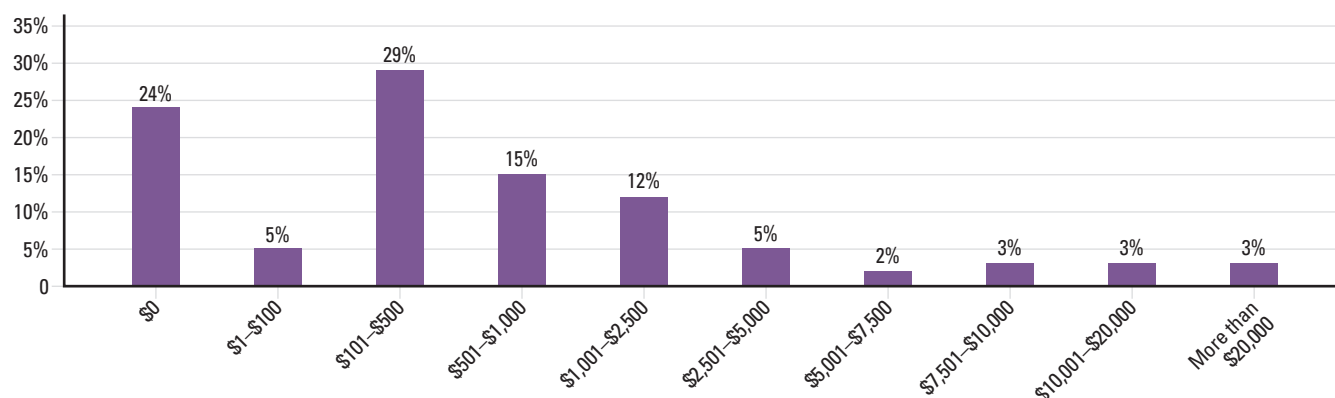
ESA parents in our survey reported spending personal funds in addition to the money the Arizona Department of Education deposited in a child’s account (Figure 9, next page).

- Nearly 30 percent of respondents spent \$101–\$500 in personal funds; 17 percent spent \$1,001–\$5,000 in personal funds; and 24 percent reported not spending any additional funds.

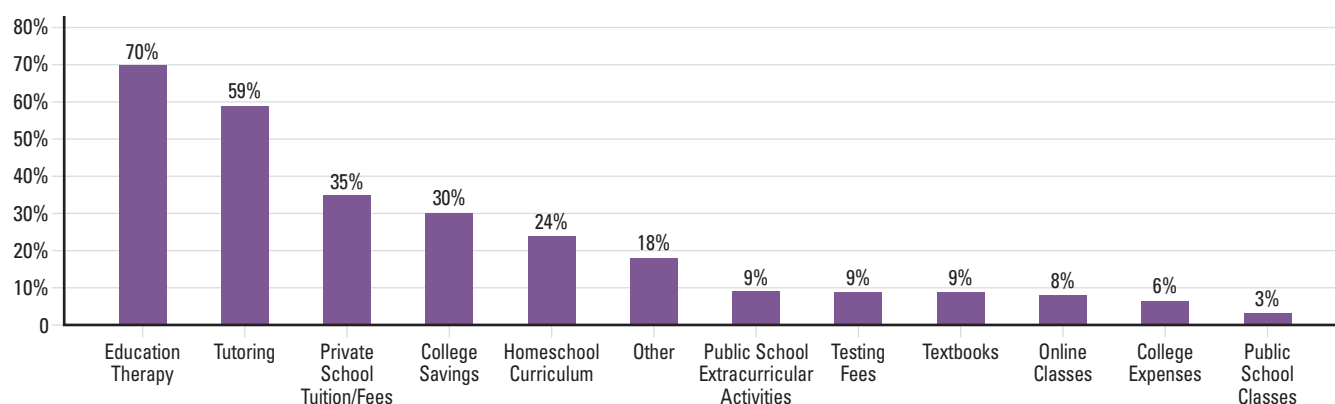


**FIGURE 9**

How Much Money Did Your Family Spend on Educational Expenses Related to the [Education Savings Account] Student Beyond What the [Education Savings Accounts] Program Covered?

**FIGURE 10**

If the ESA Program Provided an Additional \$3,000 Per Year, How Would You Spend Those Funds?



If parents and their children were given an additional \$3,000 per year for their account, most survey participants said they would use the money on additional tutoring or education therapy (respondents could select more than one option to this question). We asked that question because, in 2013, Arizona legislators and Gov. Jan Brewer increased the annual base amount of student funding for ESA awards from approximately \$3,000 to \$6,000.<sup>37</sup>

In our sample, most parents reported they would use the additional money to meet their children's unique needs through services provided outside the classroom like education therapy and tutoring. A sample of parents that selected "Other" gave the following details:

- "equine and aquatic therapy"
- "private school extracurricular activities"
- "ABA (Applied Behavior Analysis) therapy"

- "braille and assistive technology"

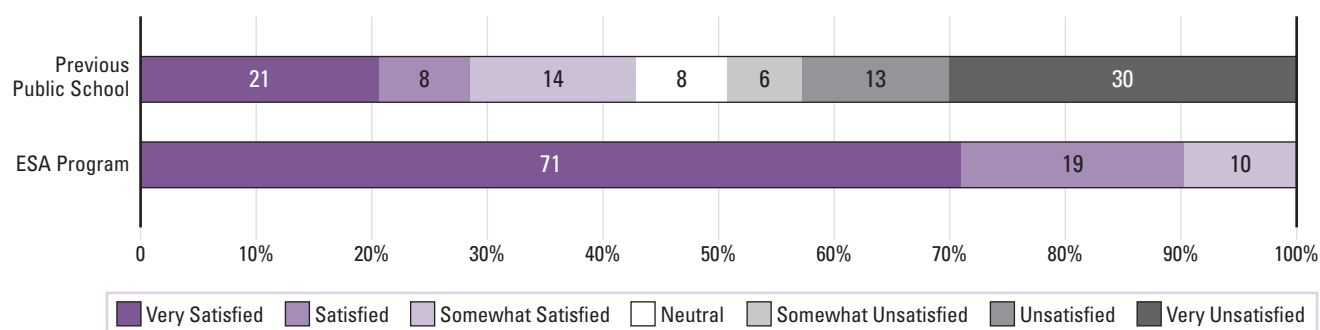
## Parent and Child Experiences Before and After Using Education Savings Accounts

Not all parents were dissatisfied with their children's public school before using an account (see Figure 11, next page).

- 43 percent reported some level of satisfaction ("somewhat satisfied," "satisfied," or "very satisfied") with their children's public school before using an ESA. Conversely, 49 percent reported some level of dissatisfaction with their children's school before using an account ("somewhat unsatisfied," "unsatisfied," or "very unsatisfied").

**FIGURE 11**

How Satisfied are You with the School or Program Your Child Used in the Year Before Enrolling in the ESA Program / How Satisfied are You with the ESA Program Overall?



Respondents were asked to explain their level of satisfaction with their public school prior to using an ESA. Some parents reported that their children were not challenged and did not receive enough individual attention:

- “He was treated well but was never challenged enough because there were all types of disabilities... that had to be met. Not enough one-on-one time.”
- “Very frustrating! School did everything to avoid providing services. My child has multiple disabilities, and they (officials) would only give him one time per month [sic] consultative therapies. It was outrageous!”
- “The school had a hard time catering to both my child’s giftedness and his disability, particularly his poor social skills. They couldn’t keep him challenged in the curriculum because they were overwhelmed by his behavior. They got him an aide but failed to train the aide how to work with him so he was learning appropriate skills. It was nothing more than a glorified babysitter.”

Some parents reported their children had been mistreated or bullied in their previous public school:

- “Lack of training for staff and teachers led to bullying of my child by adults and other children. She regressed in many areas, and now we are trying to get caught up.”
- “The school she attended did not provide any OT (Occupational Therapy) services. There were also

issues with her [being] teased and ridiculed in regard to her disability.”

- “I was extremely dissatisfied. The communication and follow-through with staff was non-existent and the bullying was out of control. My son was so unhappy.”

## Parent Satisfaction with ESAs

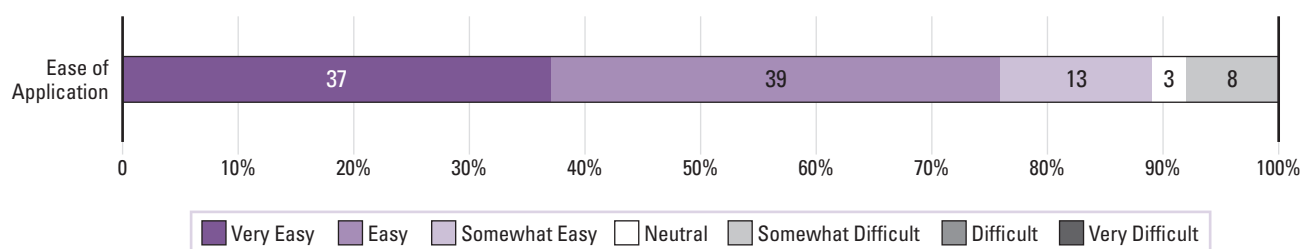
All of the parents surveyed reported some level of satisfaction with ESAs (Figure 11).

- The majority of respondents reported being “very satisfied” with the accounts (71 percent); nearly 20 percent of those surveyed reported being “satisfied,” and 10 percent said they were “somewhat satisfied.” No parent responded as neutral or reported any dissatisfaction with the accounts.

If we apply those results to the rest of the population of families using ESAs and registered on the Yahoo! message board, more parents are satisfied than dissatisfied, even taking into account the margin of error for this sample size.

Parents were asked to explain their level of satisfaction with ESAs. Parents were grateful for the educational flexibility the ESA afforded them and the resulting improvement in their children’s lives and learning opportunities:

- “This has allowed us to do what is best [and what the doctor recommended] for our son and that has made a huge difference in all our lives.”

**FIGURE 12** How Easy or Difficult was it to Apply for the ESA Program?

- “Enrolling in the ESA program allowed our child to attend a private school for children with autism with minimal additional cost to our family. We can truly say that this was the best decision we’ve made in moving our child forward, and it would not have been possible without the ESA program giving us the financial ability to choose this very beneficial path.”
- “Highly satisfied. The ESA program has given us choice in our child’s education and access to a private school aimed at children with autism. She has developed tremendously over the past school year.”
- “We are very satisfied with the level of freedom [the] ESA allows in getting our daughter the education she needs to enter into regular classes rather than having the school system keep her in special ed the rest of her life.”
- “I really love the ESA program. It has given parents a choice where there was none. It indirectly raises the expectations of school programs. It raises the level of care, raises the competition between schools—a giant benefit for the whole population. Bravo! Now the kids who were being bullied and neglected have a chance to get away and go to a place that is better.”

As explained previously, we cannot guarantee that responses to this question are reflective across the entire ESA population because of the limitations to our sample, but parent satisfaction levels are consistent with existing research on school choice. Parents in this sample report high satisfaction levels and have children with different special needs, live in households with different income levels, and use their ESAs for different expenses. Survey

respondents report high levels of satisfaction regardless of how they use their ESAs.

Most survey respondents (76 percent) reported it was either “very easy” or “easy” to apply for an account.

- 37 percent of those surveyed said it was “very easy” to apply, whereas 39 percent reported it was “easy” to apply (Figure 12).

## Suggested Ways to Improve ESAs

We asked survey participants to explain what they would like to change about the ESAs. Parents offered suggestions on how to avoid unnecessary costs, expand access to ESAs, expand the uses of ESAs, clarify which expenses qualify for ESA funds and which do not, and how to reduce paperwork, among others:

- “Having to pay PayPal fees for the private school tuition. [W]e wish we could just reimburse ourselves and avoid that expense.”
- “To extend the eligibility age limit.”<sup>38</sup>
- “I would like there to be a way to remain on the ESA program once you are on it without needing to get a new MET (Multidisciplinary Evaluation Team) report from the school district.<sup>39</sup> My child is so anxious about the public schools after his previous experience that I am not sure how I will be able to get him to go back for the necessary evaluations to satisfy the MET requirement of [an] ESA.”

- “Would like a clear path to utilizing a college savings plan for remaining funds.”
- “It is difficult to know what expenses will be covered and what will not. I wish there was access to a much more detailed ‘rule book,’ so to speak, that clearly explained everything.”
- “If the public school can use lay people as aides, I think we should [be] able to use people we know would be [effective] (retired teachers/snowbirds) as tutors. Just because they don’t have [an] AZ teachers [sic] certificate should not disqualify them.”
- “I do not have a solution for this, but if there was a way to not have to do the MET through the district that [we] chose to get/stay out of. I do not think it is right for the people that are suing the ESA to have the final say in what funding our kids receive. My daughters [sic] scores on all testing were basically non-existent, yet the district decided to change her category to the least funding possible, when they admit she has multiple challenges and need multiple accommodations. Why do they get the final say?”
- “It would be helpful to have the ability to purchase therapy equipment and hardware.... For example, a mobile arm support to use on a wheelchair tray along with a device to activate to access educational material.”
- “I wish the certifications [for tutors or other special needs service providers] weren’t as strict. There are many talented people we don’t have the opportunity to work with. I wish more extracurricular and sports type activities were covered, more materials and [teaching tools] used in homeschool, sensory tools, co-op classes, occupational therapy needs, field trips and museum memberships.”
- “Include the ability to purchase technology that would support the student. There are many apps that help special needs students, but the expenses don’t qualify.”

## Conclusion

Parent surveys are useful tools that help to make school choice options such as ESAs more transparent to lawmakers and taxpayers. Parents can use a survey to report how well the state is implementing a program, use a scale to rate their satisfaction with different parts of a school choice program, and report specific challenges as they make choices for their children. The results are useful to policymakers as they amend laws and add or remove regulations that govern educational options like ESAs.

This survey finds results that are consistent with the large body of research on parent satisfaction in school choice programs around the country. Parents using ESAs for their children are more satisfied with the accounts than with the public school their children previously attended. In addition, survey respondents report using account funds for more than private school tuition, taking advantage of the accounts’ flexibility. Results should be interpreted with caution because of the sample’s limitations, but this diverse group of ESA families representing children with different needs and using ESAs for different expenses reports a high level of satisfaction with the new accounts.

The Arizona Department of Education should survey ESA families annually to measure satisfaction, learn what parts of ESAs are most helpful, and find out if parents are struggling with the application or renewal procedures. At the very least, the department must gather accurate contact information for participating families so they can be notified easily of changes to the ESA law, eligible expenses, and department rules and regulations. The Arizona Department of Education has not gathered demographic data on participating families, so lawmakers and parents both in and outside of Arizona have little information about who is participating, how they are using the accounts, what parts of the program have satisfied parents the most, and how participating families would like the accounts to change. The department’s moratorium on data extractions also limited the number of different ways researchers can gather data on participating families. This report is the first to provide a glimpse of the parents using ESAs for their children.

The biggest obstacle to conducting this survey was access to the participants. Assistance from the Arizona Department of Education would have allowed for a more comprehensive survey that asked ESA applicants that chose not to use the accounts why they declined. Those applicants should be asked to report their satisfaction with their choice to either use personal funds to pay private school tuition or remain at a public school. The Arizona Department of Education should survey those families in the future or contract with evaluators to conduct such a study.

Nevertheless, this survey finds that ESA parents are satisfied with their choices to use ESAs. Education savings accounts are the most innovative educational option in the U.S., and policymakers around the country should use ESAs as a model of flexibility to give every child the chance at a great education.

# Appendix 1

## Family Income and Education Savings Account Usage

The table and figures in Appendix 1 and 2 provide an analysis of survey respondents’ reported household income levels, ESA usage, and satisfaction with ESAs. As noted previously, this analysis may not be representative of the entire ESA population, and our sample is a self-selected one. However, based on the existing data on families using private school choice programs and the limited data on ESA families, this sample has key similarities with existing research in the level of satisfaction among parents and how families use their accounts to pay for different educational expenses (see Figure 8, page 11). The similarities hold even after taking into consideration the margin of error for this survey’s sample.

Table 2 provides data on how families in different income ranges use ESA funds. (Not every respondent answered the question regarding his or her family income, so this section does not include all respondents who participated in the ESA survey.) Because families often used ESAs for multiple purposes, the rows do not add up to 100 percent. The figures in each cell represent the percentage of families in that row’s income range who spent ESA funds on educational services related to that column’s heading. For example, among families earning between \$0 and \$27,999, 44.4 percent spent some or all of their ESA funds on private school tuition and fees whereas 66.7 percent of families in that income range spent at least some ESA funds on tutoring. Many families in that income range spent money on both.

In each income range, private school tuition was the most common use of ESA funds except for the lowest-

income families, a higher percentage of which bought homeschool curriculum. For most income ranges, the second-most common use of ESA funds was education therapy, followed by tutoring or homeschool curricula. Only those in the highest income range used ESA funds for college expenses or set funds aside as college savings. None of the respondents who reported their family income used the account for public school classes.

## Use of Education Savings Account Funds, Actual vs. Potential, by Family Income

Figures 13–17 illustrate how families in different income brackets would spend an additional \$3,000 in ESA funds compared with how they actually spent their account funds in the past year. Respondents were asked, “Please identify the ways that you used the ESA funds during the 2010–11 and/or 2011–12 school year. Select all that apply.” Next, respondents were asked, “If the ESA program provided an additional \$3,000 per year, how would you spend those funds? Select all that apply.” Across all income brackets, the most popular ways that families would spend the additional \$3,000 of ESA funds were education therapy and tutoring.

All of the respondents in the lowest income bracket reported they would spend some or all of the additional \$3,000 on education therapy (Figure 13, next page). Because only 33 percent of those families are currently spending account funds on education therapy, evidence indicates that expense is out of reach for most low-income families at the current funding level. About one-third of the lowest-income families reported they would like to save additional ESA funds for college, though currently none is doing so.

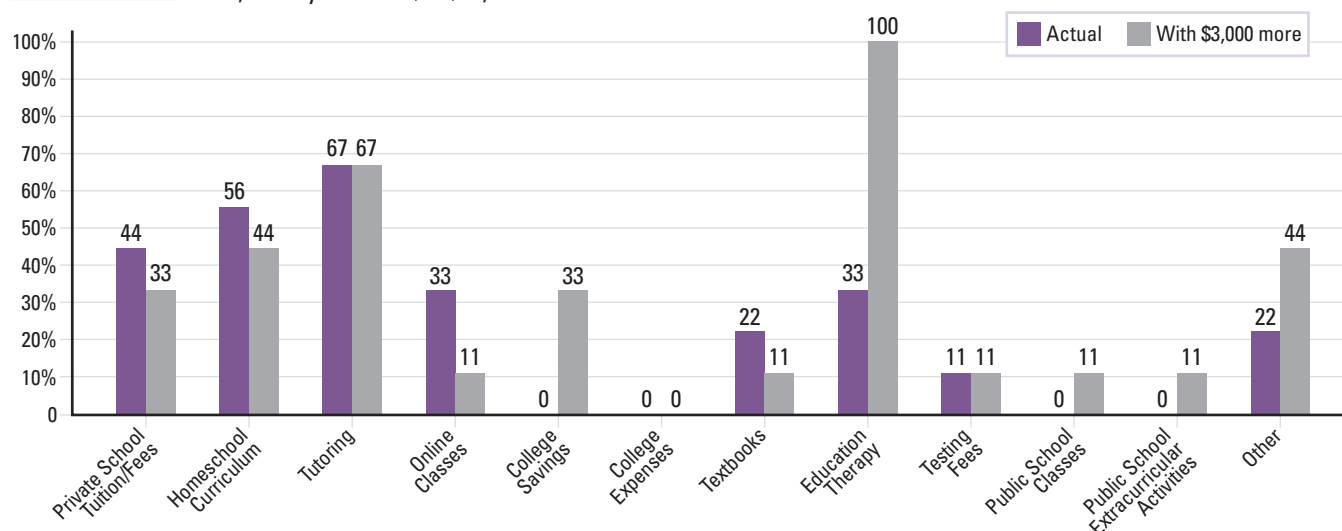
**TABLE 2** Family Income and Education Savings Account Usage

| Income Level      | Private School Tuition/Fees | Homeschool Curriculum | Tutoring | Online Classes | College Savings | College Expenses | Education Therapy | Testing Fees | Public School Classes | Public School Extracurricular Activities | Other |
|-------------------|-----------------------------|-----------------------|----------|----------------|-----------------|------------------|-------------------|--------------|-----------------------|--|-------|
| \$0–\$27,999      | 44.4%                       | 55.6%                 | 66.7%    | 33.3%          | 0.0%            | 0.0%             | 33.3%             | 11.1%        | 0.0%                  | 0.0%                                     | 22.2% |
| \$28,000–\$41,999 | 81.8%                       | 18.2%                 | 27.3%    | 9.1%           | 9.1%            | 0.0%             | 36.4%             | 9.1%         | 0.0%                  | 0.0%                                     | 9.1%  |
| \$42,000–\$56,999 | 100.0%                      | 20.0%                 | 40.0%    | 20.0%          | 0.0%            | 0.0%             | 40.0%             | 0.0%         | 0.0%                  | 0.0%                                     | 0.0%  |
| \$57,000–\$70,999 | 54.5%                       | 54.5%                 | 27.3%    | 9.1%           | 0.0%            | 0.0%             | 54.5%             | 0.0%         | 0.0%                  | 0.0%                                     | 9.1%  |
| \$71,000 or more  | 56.5%                       | 34.8%                 | 26.1%    | 8.7%           | 4.3%            | 8.7%             | 43.5%             | 8.7%         | 0.0%                  | 4.3%                                     | 8.7%  |

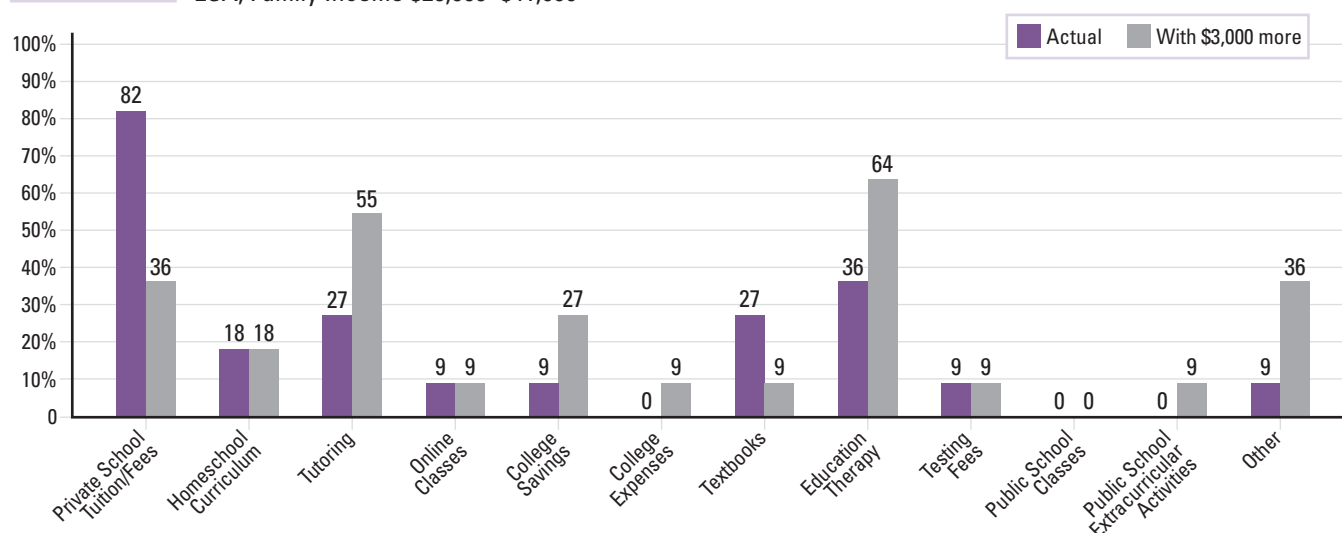


**FIGURE 13**

Use of Education Savings Account Funds, Actual vs. Potential, if the Family had \$3,000 More in Their Child's ESA, Family Income \$0–\$27,999

**FIGURE 14**

Use of Education Savings Account Funds, Actual vs. Potential, if the Family had \$3,000 More in Their Child's ESA, Family Income \$28,000–\$41,999



As seen in Figure 14, nearly twice as many families in the \$28,000–\$41,999 income bracket would spend some or all of the additional \$3,000 in account funds on education therapy or tutoring compared with current spending patterns. Nearly three times as many families would like to set aside savings for college compared with the number currently doing so.

Figure 15 (next page) shows 60 percent of families in the \$42,000–\$56,999 income bracket would spend some or all of the additional \$3,000 in account funds on education therapy compared with the 40 percent currently doing so. Though none is presently setting aside account funds

as college savings, 20 percent of families reported they would do so with additional funds.

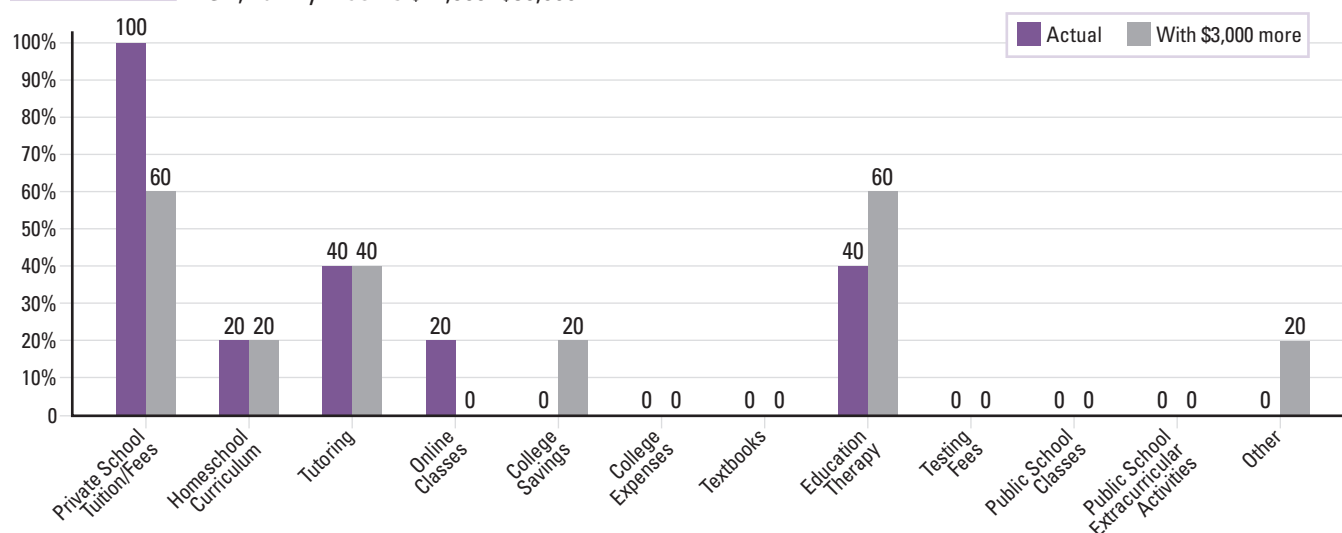
As shown in Figure 16 (next page), more than three times as many families in the \$57,000–\$70,999 income bracket would spend some or all of the additional \$3,000 in ESA funds on tutoring than are currently doing so. More than half of families in that income bracket are spending account funds on educational therapy, but more than 70 percent of families would do so with additional funding. Although no respondents reported they are setting aside ESA funds for college savings, one-third of families reported they would do so with additional funds.

Nearly twice as many families in the highest income bracket would spend some or all of the additional \$3,000 in ESA funds on tutoring or education therapy than are currently doing so. Nearly five times as many would set aside ESA funds for college savings.

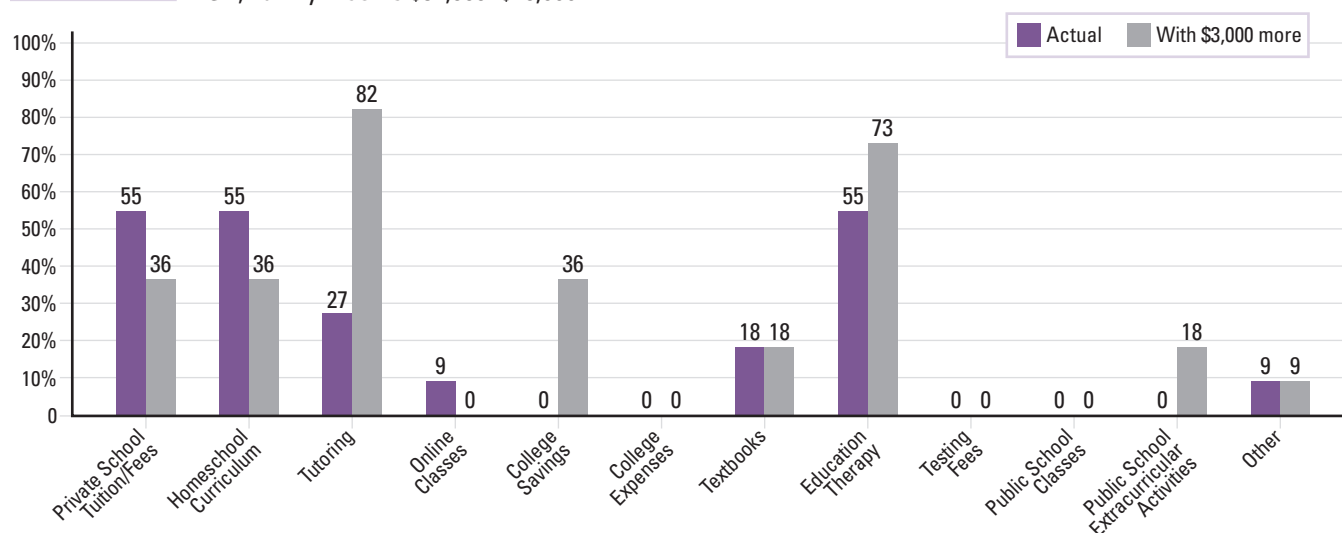
A slightly higher number of families in this income bracket reported they would spend additional funds on online classes, college expenses, and testing fees than current spending patterns.

**FIGURE 15**

Use of Education Savings Account Funds, Actual vs. Potential, if the Family had \$3,000 More in Their Child's ESA, Family Income \$42,000–\$56,999


**FIGURE 16**

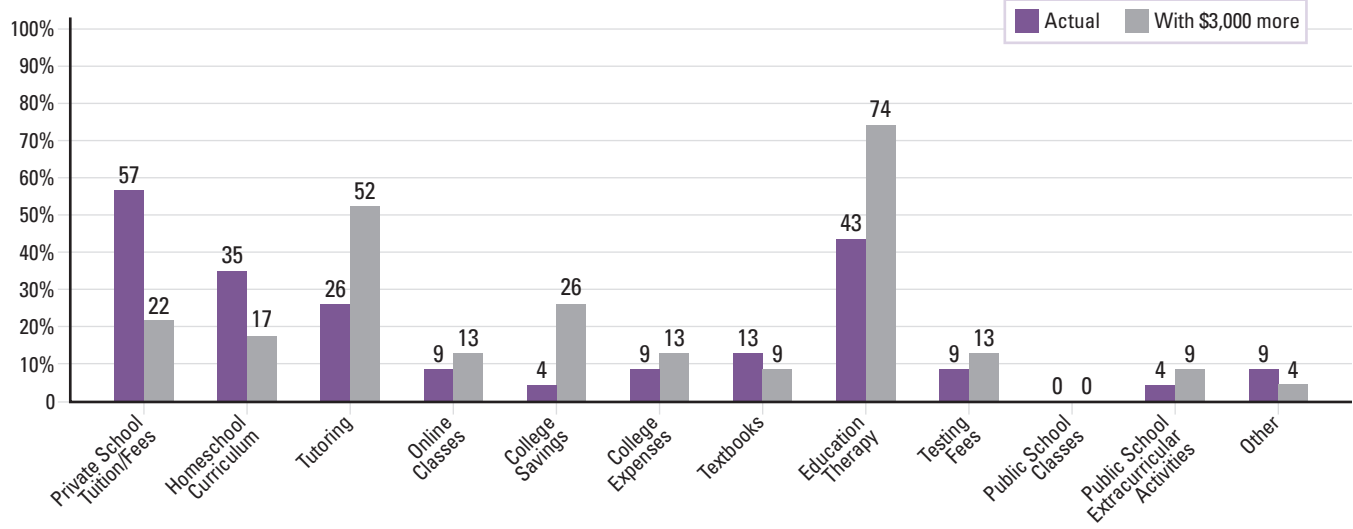
Use of Education Savings Account Funds, Actual vs. Potential, if the Family had \$3,000 More in Their Child's ESA, Family Income \$57,000–\$70,999





**FIGURE 17**

Use of Education Savings Account Funds, Actual vs. Potential, if the Family had \$3,000 More in Their Child's ESA, Family Income \$71,000 or More



## Appendix 2

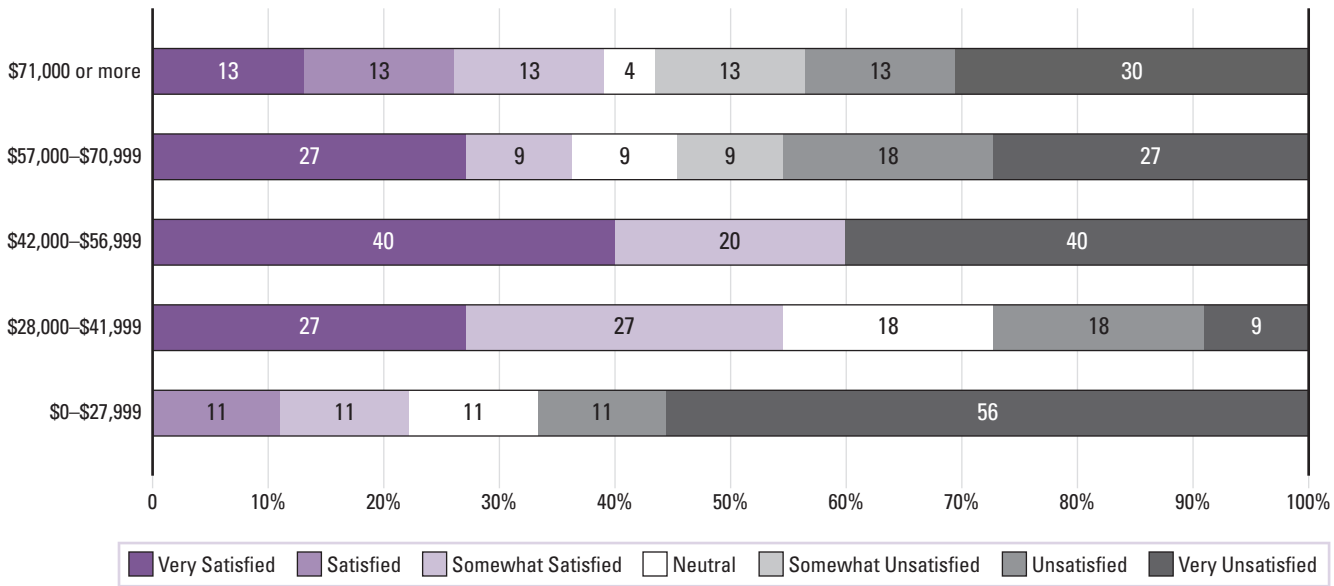
### Parental Satisfaction by Family Income Level

A majority of parents in the highest and the lowest income brackets reported being unsatisfied with their previous public schools. Parents in the lowest income bracket were least satisfied, with two-thirds reporting

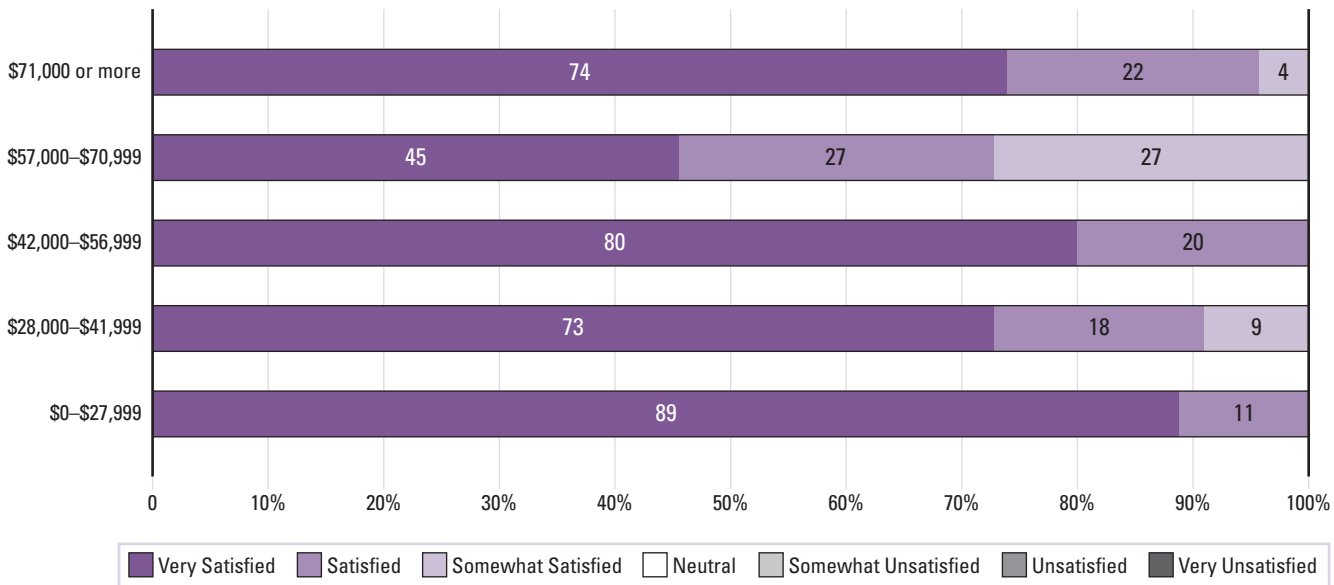
they were not satisfied, of which 56 percent were very unsatisfied.

All families using an ESA are satisfied with the accounts, with strong majorities in each income bracket reporting they are satisfied or very satisfied. Families in the lowest income bracket are the most satisfied, with 88.9 percent reporting they are very satisfied. We caution applying those results to the ESA population as a whole or even

**FIGURE 18** Parents' Satisfaction with Previous Public School (Before Using an Education Savings Account), by Income Level



**FIGURE 19** Parents' Satisfaction with Education Savings Accounts, by Income Level



the rest of the Yahoo! message board because of the sample's limitations. However, even with the margin of error, the satisfaction levels are consistently positive.

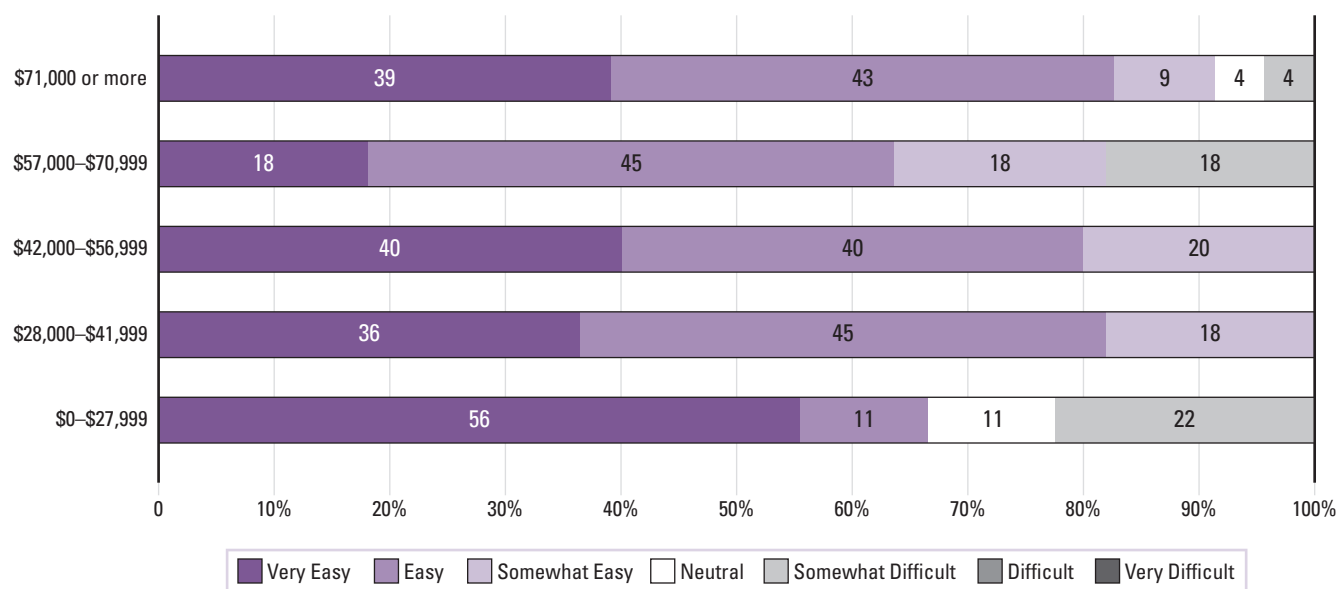
A majority of families in each income bracket report that it is easy or very easy to apply for ESAs. None of the families reported that it was difficult or very difficult. Families in the lowest income bracket reported the highest level of difficulty, with 22 percent reporting that

applying to the ESA program was somewhat difficult.

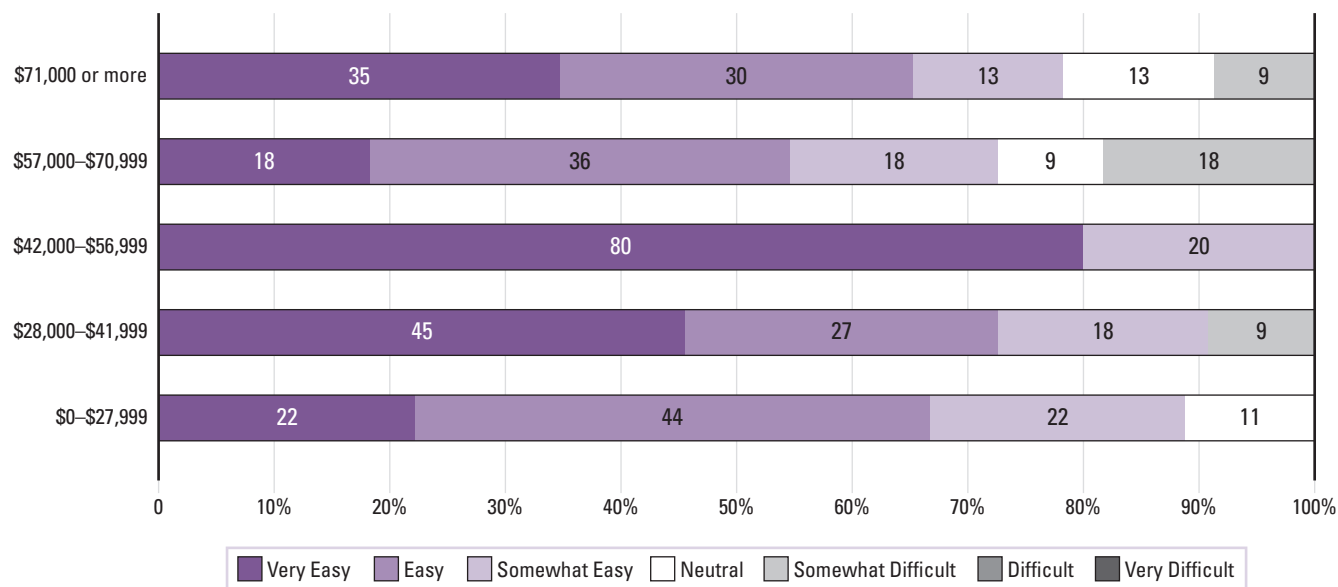
A majority of families in every income bracket report it is easy or very easy to use the ESAs. Families in the lowest three income brackets had the least difficulty applying for an account.

No families in any income bracket report that it is difficult or very difficult to use the accounts.

**FIGURE 20** Ease of Applying for an Education Savings Account, by Income Level



**FIGURE 21** Ease of Using an Education Savings Account, by Income Level



## Appendix 3

### Questionnaire

#### 1. What is the total number of children living in your home?<sup>40</sup>

- |               |                         |
|---------------|-------------------------|
| a. 1 child    | f. 6 children           |
| b. 2 children | g. 7 children           |
| c. 3 children | h. 8 children           |
| d. 4 children | i. More than 8 children |
| e. 5 children |                         |

#### 2. How many children in your home used an Empowerment Scholarship Account (ESA) during the 2011–12 and/or 2012–13 school years?

- |                   |                             |
|-------------------|-----------------------------|
| a. 1 ESA student  | f. 6 ESA students           |
| b. 2 ESA students | g. 7 ESA students           |
| c. 3 ESA students | h. 8 ESA students           |
| d. 4 ESA students | i. More than 8 ESA students |
| e. 5 ESA students |                             |

#### 3. What is the gender of the ESA student?

- a. Female
- b. Male

#### 4. Which grade does the ESA student currently attend?

- |                 |             |
|-----------------|-------------|
| a. Kindergarten | h. Grade 7  |
| b. Grade 1      | i. Grade 8  |
| c. Grade 2      | j. Grade 9  |
| d. Grade 3      | k. Grade 10 |
| e. Grade 4      | l. Grade 11 |
| f. Grade 5      | m. Grade 12 |
| g. Grade 6      |             |

#### 5. What is the age of the ESA student?

- |                 |                 |
|-----------------|-----------------|
| a. 5 years old  | j. 14 years old |
| b. 6 years old  | k. 15 years old |
| c. 7 years old  | l. 16 years old |
| d. 8 years old  | m. 17 years old |
| e. 9 years old  | n. 18 years old |
| f. 10 years old | o. 19 years old |
| g. 11 years old | p. 20 years old |
| h. 12 years old | q. 21 years old |
| i. 13 years old |                 |

#### 6. What is the race/ethnicity of the ESA student?

- a. Asian/Non-Hispanic
- b. Native American/Non-Hispanic
- c. African American/Non-Hispanic
- d. Hispanic
- e. White/Non-Hispanic
- f. Pacific Islander/Non-Hispanic
- g. Multi-racial/Non-Hispanic
- h. Other

#### 7. In which county is the ESA student's primary residence?

- |                |               |
|----------------|---------------|
| a. Apache      | h. Mohave     |
| b. Cochise     | i. Navajo     |
| c. Coconino    | j. Pima       |
| d. Gila Graham | k. Pinal      |
| e. Greenlee    | l. Santa Cruz |
| f. La Paz      | m. Yavapai    |
| g. Maricopa    | n. Yuma       |

**8. What is the ESA student's ESA disability category/weight?<sup>41</sup>**

- a. HI: Hearing impaired
- b. MD-R, A-R, and SMR-R: students with multiple disabilities, autism, and severe mental retardation placed in resource program
- c. MD-SC, A-SC, and SMR-SC: students with multiple disabilities, autism, and severe mental retardation in a self-contained program
- d. MD-SSI: students with multiple disabilities and severe sensory impairments
- e. OI-R: students with orthopedic impairments in a resource program
- f. OI-SC: students with orthopedic impairments in a self-contained program
- g. P-SD: preschool students with hearing impairments, visual impairments, developmental delay, preschool severe delay, or speech/language impairment
- h. DD, ED, MIMR, SLD, SLI, and OHI: students with developmental delays, emotional disabilities, mild mental retardation, specific learning disability, speech/language impairment, and other health impairment
- i. ED-P: students with emotional disabilities enrolled in private special ED or intensive district programs
- j. MOMR: students with moderate mental retardation
- k. VI: visually impaired
- l. K3: students in kindergarten through third grade
- m. ELL: English language learners
- n. Does not apply

**9. How much money did your family spend on educational expenses related to the ESA student beyond what the ESA program covered?**

- a. \$0
- b. \$1–\$100
- c. \$101–\$500
- d. \$501–\$1,000
- e. \$1,001–\$2,500
- f. \$2,501–\$5,000
- g. \$5,001–\$7,500
- h. \$7,501–\$10,000
- i. \$10,001–\$20,000
- j. More than \$20,000

**10. Please identify the ways that you used the ESA funds during the 2010–11 and/or 2011–12 school year.**

- a. Private school tuition/fees
- b. Homeschool curriculum
- c. Tutoring
- d. Online classes
- e. College savings
- f. College expenses
- g. Textbooks
- h. Education therapy
- i. Testing fees
- j. Public school classes
- k. Public school extracurricular activities
- l. Other

**11. If the ESA program provided an additional \$3,000 per year, how would you spend those funds?**

- a. Private school tuition/fees
- b. Homeschool curriculum
- c. Tutoring
- d. Online classes
- e. College savings
- f. College expenses
- g. Textbooks
- h. Education therapy
- i. Testing fees
- j. Public school classes
- k. Public school extracurricular activities
- l. Other

**12. How satisfied are you with the school or program your child used in the year before enrolling in the ESA program?**

- a. Very satisfied
- b. Satisfied
- c. Somewhat satisfied
- d. Neutral
- e. Somewhat unsatisfied
- f. Unsatisfied
- g. Very unsatisfied

**13. Please describe your level of satisfaction with the school or program your child used in the year before enrolling in the ESA program in the space provided below.**

**14. How did you find out about the ESA program?**

- a. Friend or family member
- b. Public school staff member
- c. Private school staff member
- d. Government website
- e. Goldwater Institute
- f. American Federation for Children
- g. Hispanic Council for Reform and Educational Options (HCREO)
- h. Other nonprofit organization
- i. Newspaper article
- j. Radio
- k. Other

**15. How satisfied are you with the ESA program overall?**

- a. Very satisfied
- b. Satisfied
- c. Somewhat satisfied
- d. Neutral
- e. Somewhat unsatisfied
- f. Unsatisfied
- g. Very unsatisfied

**16. How easy or difficult was it to apply for the ESA program?**

- a. Very easy
- b. Easy
- c. Somewhat easy
- d. Neutral
- e. Somewhat difficult
- f. Difficult
- g. Very difficult

**17. How easy or difficult was it to use the ESA funds?**

- a. Very easy
- b. Easy
- c. Somewhat easy
- d. Neutral
- e. Somewhat difficult
- f. Difficult
- g. Very difficult

**18. Please briefly describe your level of satisfaction with the ESA program in the space provided below.**

**19. Besides increasing funding, is there anything you would like to change about the ESA program?**

**20. What was your family's total household income in 2012?**

- a. \$0–\$20,999
- b. \$21,000–\$27,999
- c. \$28,000–\$34,999
- d. \$35,000–\$41,999
- e. \$42,000–\$49,999
- f. \$50,000–\$56,999
- g. \$57,000–\$63,999
- h. \$64,000–\$70,999
- i. \$71,000 or more

## Survey Project and Profile

**Title:** A Survey of Families Using Arizona’s Education Savings Accounts

**Survey Organization:** The Goldwater Institute

**Survey Sponsor:** The Friedman Foundation for Educational Choice

**Interview Dates:** April 9 to May 22, 2013

**Interview Method:** Web survey using Kwiksurveys.com

**Language(s):** English

**Sample Frame:** Parents of students using education savings accounts in Arizona

**Sampling Method:** Email contact with families using education savings accounts via a Yahoo! message board for participating families or families using accounts that had contacted the Goldwater Institute

**Response Rate:** 37 percent (67 out of 179)

**Margin of Error:** ± 9.5 percentage points

**Weighting:** No

**Oversampling:** No

**Project Contact:** Jonathan Butcher, Education Director, Goldwater Institute, [jbutcher@goldwaterinstitute.org](mailto:jbutcher@goldwaterinstitute.org)  
Jason Bedrick, Policy Analyst, Cato Institute, [jbedrick@cato.org](mailto:jbedrick@cato.org)

The authors are responsible for overall polling design, question wording and ordering, this paper’s analysis, charts, and writing, and any unintentional errors or misrepresentations.

Parents who responded to our survey provided the following demographic information on the child (or children) in their home who is (are) using an ESA.

| Gender | Number | Percent of Total |
|--------|--------|------------------|
| Male   | 47     | 70%              |
| Female | 20     | 30%              |

| Grade | Number | Percent of Total |
|-------|--------|------------------|
| K     | 5      | 7%               |
| 1     | 5      | 7%               |
| 2     | 6      | 9%               |
| 3     | 7      | 10%              |
| 4     | 11     | 16%              |
| 5     | 3      | 4%               |
| 6     | 7      | 10%              |
| 7     | 7      | 10%              |
| 8     | 4      | 6%               |
| 9     | 3      | 4%               |
| 10    | 0      | 0%               |
| 11    | 5      | 7%               |
| 12    | 4      | 6%               |

| Age | Number | Percent of Total |
|-----|--------|------------------|
| 5   | 2      | 3%               |
| 6   | 5      | 7%               |
| 7   | 3      | 4%               |
| 8   | 7      | 10%              |
| 9   | 6      | 9%               |
| 10  | 7      | 10%              |
| 11  | 8      | 12%              |
| 12  | 6      | 9%               |
| 13  | 7      | 10%              |
| 14  | 4      | 6%               |
| 15  | 2      | 3%               |
| 16  | 3      | 4%               |
| 17  | 2      | 3%               |
| 18  | 0      | 0%               |
| 19  | 3      | 4%               |
| 20  | 1      | 1%               |
| 21  | 1      | 1%               |

| Race                          | Number | Percent of Total |
|-------------------------------|--------|------------------|
| Asian/Non-Hispanic            | 0      | 0%               |
| Native American/Non-Hispanic  | 1      | 1%               |
| African-American/Non-Hispanic | 1      | 1%               |
| Hispanic                      | 8      | 12%              |
| White/Non-Hispanic            | 51     | 76%              |
| Pacific Islander/Non-Hispanic | 0      | 0%               |
| Multi-racial/Non-Hispanic     | 2      | 3%               |
| Other                         | 4      | 6%               |

| County     | Number | Percent of Total |
|------------|--------|------------------|
| Apache     | 0      | 0%               |
| Cochise    | 0      | 0%               |
| Coconino   | 1      | 2%               |
| Gila       | 0      | 0%               |
| Graham     | 0      | 0%               |
| Greenlee   | 0      | 0%               |
| La Paz     | 2      | 3%               |
| Maricopa   | 57     | 88%              |
| Mojave     | 0      | 0%               |
| Navajo     | 0      | 0%               |
| Pima       | 2      | 3%               |
| Pinal      | 0      | 0%               |
| Santa Cruz | 0      | 0%               |
| Yavapai    | 3      | 5%               |
| Yuma       | 0      | 0%               |





## Notes

1. "Empowerment Scholarship Account AZ," Yahoo! Groups, accessed June 17, 2013, <http://groups.yahoo.com/group/esaaz/>. The Arizona Dept. of Education (ADE) refused our request to email the survey to all of the families using an ESA.

2. 302 students used ESAs in the 2012–13 school year. Michelle Reese, "Arizona's Education Savings Account Programs Growing," *East Valley Tribune*, Dec. 24, 2012, [http://www.eastvalleytribune.com/local/education/article\\_e3a65f48-4df1-11e2-b6db-001a4bcf887a.html](http://www.eastvalleytribune.com/local/education/article_e3a65f48-4df1-11e2-b6db-001a4bcf887a.html).

3. Arizona Rev. Stat. §§ 15.2401-04 (2012), <http://www.azleg.gov/ArizonaRevisedStatutes.asp?Title=15>. In 2013, Gov. Jan Brewer signed S.B. 1363, which increases the total state contribution to each account, but the state still saves 10 percent of each award. See Arizona S.B. 1363, 51st Leg., 1st Sess. (2013), <http://www.azleg.gov/legtext/51leg/1r/laws/0250.pdf>.

4. ADE, email message to authors, Mar. 1, 2013.

5. Reese, "Arizona's Education Savings Account Programs Growing."

6. Arizona H.B. 2622, 50th Leg., 2d Sess. (2012), <http://www.azleg.gov/legtext/50leg/2r/laws/0360.pdf>.

7. Arizona S.B. 1363, 51st Leg., 1st Sess. (2013), <http://www.azleg.gov/legtext/51leg/1r/laws/0250.pdf>.

8. Arizona Empowerment Scholarship Accounts; Funds, Arizona Rev. Stat. § 15-2402 (2012), <http://www.azleg.gov/FormatDocument.asp?inDoc=/ars/15/02402.htm&Title=15&DocType=ARS>.

9. Arizona Joint Leg. Budget Committee, "K-12 Funding (M&O, Capital, and All Other) FY 2004 through FY 2013 Est," Aug. 10, 2012, <http://www.azleg.gov/jlbc/allfunding.pdf>.

10. ADE, "Approximate Funding Levels, Empowerment Scholarship Accounts," Dec. 19, 2011, <http://www.azed.gov/esa/files/2011/12/approximate-funding-levels.docx>.

11. Arizona S.B. 1363, 51st Leg., 1st Sess. (2013), <http://www.azleg.gov/legtext/51leg/1r/laws/0250.pdf>; Arizona Dept. of Education, email message to authors, Aug. 13, 2013.

12. For example, see "Jordan's Journey: Empowerment Scholarship Accounts," YouTube video, 5:26, posted by "Arizona AllianceforSchoolChoice," Mar. 29, 2013, [http://www.youtube.com/watch?v=iVbMrfTta\\_g](http://www.youtube.com/watch?v=iVbMrfTta_g).

13. For more information on the audit system, see Jonathan Butcher, *Education Savings Accounts: A Path to Give All Children an Effective Education and Prepare Them for Life*, Policy Reports 253 (Phoenix: Goldwater Institute, 2012), [http://goldwaterinstitute.org/sites/default/files/PR253ESAsPathToAllChildren\\_0.pdf](http://goldwaterinstitute.org/sites/default/files/PR253ESAsPathToAllChildren_0.pdf).

14. "Niehaus v. Huppenthal," Goldwater Institute, last modified Feb. 13, 2013, <http://www.goldwaterinstitute.org/article/niehaus-v-huppenthal>.

15. "Cain v. Horne," FindLaw, accessed June 17, 2013, <http://caselaw.findlaw.com/az-supreme-court/1391598.html>.

16. US Commission on Civil Rights, *School Choice: The Blaine Amendments and Anti-Catholicism*, (Jan. 14, 2011), p. 48, <http://www.usccr.gov/pubs/BlaineReport.pdf>.

17. For more information, see The Friedman Foundation for Educational Choice, "Legal Developments" in *The ABCs of School Choice: The Comprehensive Guide to Every Private School Choice Program in America*, 2013 ed. (Indianapolis: Friedman Foundation for Educational Choice, 2013), pp. 89–90, <http://www.edchoice.org/Foundation-Services/Publications/2013-ABCs-of-School-Choice.aspx>.

18. See note 14 above.

19. ADE, "Empowerment Scholarship Account Parent Satisfaction Survey," (Dec. 2012), <http://www.azed.gov/esa/files/2012/12/esa-survey.pdf>.

20. Paul DiPerna, *Schooling in America Survey: What Do Mothers Say About K-12 Education?*, Polling Papers 15 (Indianapolis: Friedman Foundation for Educational Choice, 2013), <http://www.edchoice.org/CMSModules/EdChoice/FileLibrary/1000/Schooling-in-America-Survey.pdf>.

21. *Ibid.*, p. 18.

22. DiPerna, *Interstate Survey: What Do Voters Say About Education in Six States?*, Polling Papers 1 (Indianapolis: Friedman Foundation for Educational Choice, 2010); DiPerna, *Indiana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 2 (Indianapolis: Friedman Foundation for Educational Choice, 2011); DiPerna, *Alaska K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 3 (Indianapolis: Friedman Foundation for Educational Choice, 2011); DiPerna, *New Mexico K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 4 (Indianapolis: Friedman Foundation for Educational Choice, 2011); DiPerna, *Idaho K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 5 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *Washington K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 6 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *Louisiana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 7 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *Tennessee K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 9 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *Montana K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 10 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *North Carolina K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 11 (Indianapolis: Friedman Foundation for Educational Choice, 2012); DiPerna, *Maine K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 12 (Indianapolis: Friedman Foundation for Educational Choice, 2013); DiPerna, *North Dakota K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 13 (Indianapolis: Friedman Foundation for Educational Choice, 2013); DiPerna, *Texas K-12 and School Choice Survey: What Do Voters Say About K-12 Education?*, Polling Papers 14 (Indianapolis: Friedman Foundation for Educational Choice, 2013), <http://www.edchoice.org/Research/Our-Studies---Reports.aspx>.

23. Greg Forster and Christian D'Andrea, *An Empirical Evaluation of the Florida Tax Credit Scholarship Program*, School Issues in the State (Indianapolis: Friedman Foundation for Educational Choice, 2009),

<http://www.edchoice.org/Research/Reports/An-Empirical-Evaluation-of-the-Florida-Tax-Credit-Scholarship-Program.aspx>.

24. Sarah Grady, Stacey Bielick, and Susan L. Aud, *Trends in the Use of School Choice: 1993 to 2007: Statistical Analysis Report*, special report prepared at the request of the National Center for Education Statistics, Apr. 2010, p. 30, figure 9, <http://nces.ed.gov/pubs2010/2010004.pdf>.

25. See reports at Univ. of Arkansas; Dept. of Education Reform; the “School Choice Demonstration Project (SCDP),” <http://www.uaedreform.org/school-choice-demonstration-project/>.

26. Thomas Stewart, Patrick J. Wolf, Stephen Q. Cornman, Kennan McKenzie-Thompson, and Jonathan Butcher, *Family Reflections on the District of Columbia Opportunity Scholarship Program*, SCDP Reports 0901 (Fayetteville: Univ. of Arkansas, Dept. of Education Reform, School Choice Demonstration Project, 2009), p. 34, [http://www.uaedreform.org/wp-content/uploads/2009/01/Family\\_Reflections\\_DCOSP\\_2009\\_Final.pdf](http://www.uaedreform.org/wp-content/uploads/2009/01/Family_Reflections_DCOSP_2009_Final.pdf).

27. Thomas Stewart and Patrick J. Wolf, *Parent and Student Experiences with Choice in Milwaukee, Wisconsin*, SCDP Milwaukee Evaluation Reports 13 (Fayetteville: Univ. of Arkansas, Dept. of Education Reform, School Choice Demonstration Project, 2009), p. 12, [http://www.uark.edu/ua/der/SCDP/Milwaukee\\_Eval/Report\\_13.pdf](http://www.uark.edu/ua/der/SCDP/Milwaukee_Eval/Report_13.pdf).

28. Stewart and Wolf, *Parent and Student Experiences*.

29. Lindsey M. Burke, *The Education Debit Card: What Arizona Parents Purchase with Education Savings Accounts* (Indianapolis: Friedman Foundation for Educational Choice, 2013), <http://www.edchoice.org/Research/Reports/The-Education-Debit-Card--What-Arizona-Parents-Purchase-with-Education-Savings-Accounts.aspx>.

30. ADE, “Special Education: October 1, 2012 Count by Gender,” n.d., <http://www.azed.gov/special-education/files/2013/03/100112countbygender.pdf>.

31. US Census Bureau, “State and County QuickFacts: Maricopa County, Arizona,” last modified June 27, 2013, <http://quickfacts.census.gov/qfd/states/04/04013.html>. Author calculations.

32. The median household income in the US between 2007 and 2011 was \$52,762. US Census Bureau, “State and County Quick Facts: USA,” last modified June 27, 2013, <http://quickfacts.census.gov/qfd/states/00000.html>.

33. US Census Bureau, “State and County QuickFacts: Arizona,” last modified June 27, 2013, <http://quickfacts.census.gov/qfd/states/04000.html>.

34. ADE, “Empowerment Scholarship Account Approximate Funding Levels,” (Dec. 19, 2011) <http://www.azed.gov/esa/files/2011/12/approximate-funding-levels.pdf>.

35. Niehaus, Exhibit 1, “Affidavit of Stacey Morley in Support of Defendant’s Response to Motion for Preliminary and Permanent Injunction,” (Nov. 1, 2011).

36. See note 29 above.

37. See note 7 above.

38. According to Arizona law, a child’s education savings account sunsets after the child graduates from college or after four consecutive

years after high school “in which the student is not enrolled in an eligible postsecondary institution.” See note 8 above.

39. Multidisciplinary Evaluation Team reports (METs) are used to create Individualized Education Programs (IEPs), which define the services a school will provide to a student with special needs. METs expire after three years, and IEPs must be updated annually. To maintain eligibility for an education savings account, a child using an account must have a current MET or IEP. For more information, see ADE, “Empowerment Scholarship: FAQ,” accessed June 17, 2013, <http://www.azed.gov/esa/faq/>.

40. Participants were sent a pre-survey form asking for their email address and the number of children in their home using an education savings account. For respondents with multiple children, we sent a survey asking the same questions as the survey above but each question specified if their response should be about their oldest child using an education savings account or their youngest child using an account. Responses were consolidated in this report.

41. See note 34 above.

## About the Authors



Jonathan Butcher serves as Education Director for the Goldwater Institute. He has researched education policy and school choice programs at both the state and national level. Prior to joining Goldwater, Jonathan was the Director of Accountability for the South Carolina Public Charter School District, South Carolina's only statewide charter school authorizer. Jonathan studied education policy at the Department of Education Reform at the University of Arkansas and worked with the School Choice Demonstration Project, the research team that evaluated voucher programs in

Washington, D.C., and Milwaukee, Wisconsin.

Jonathan studied education and family policy at the Heritage Foundation, a research institute in Washington, D.C. His research has appeared in journals such as *Education Next* and the *Georgetown Journal of Law and Public Policy*. He has appeared on local and national TV outlets, including interviews on Fox News. He has been a guest on many radio programs, and his commentary has appeared in newspapers around the country. He holds a B.A. in English from Furman University and an M.A. in economics from the University of Arkansas.



Jason Bedrick is a policy analyst with Cato's Center for Educational Freedom. Bedrick has extensive policy research experience, including detailed legislative development and analysis. He previously served as a legislator in the New Hampshire House of Representatives and was a research fellow at the Josiah Bartlett Center for Public Policy, where he focused on state education policy. Bedrick received his Master in Public Policy, with a focus in education policy, from the John F. Kennedy School of Government at Harvard University. His thesis, "Choosing to Learn," assessed

the tax-credit scholarship programs operating in eight states, including their impact on student performance, fiscal impact, program design, and popularity.





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