

Foreword

School systems have limited financial resources with which to pursue their objectives and the design of school funding policies plays a key role in ensuring that resources are directed to where they can make the most difference. This report seeks to assist governments in achieving their education policy objectives through the efficient and equitable use of financial resources. It provides a systematic analysis of school funding policies by looking into the organisation of responsibilities for raising and spending school funds, the design of mechanisms to distribute funding to schools, the procedures for planning education budgets, and the practices for monitoring, evaluating and reporting how funding has been used. Eighteen school systems were actively engaged in the preparation of this report. In addition, the analysis considers the broader research and policy literature on school funding approaches in other OECD and partner countries.

This report is the first in a series of thematic comparative reports which bring together the findings of a major OECD project on the effective use of school resources, the OECD Review of Policies to Improve the Effectiveness of Resource Use in Schools (School Resources Review). Forthcoming reports will focus on the organisation of the school offer and on the management of human resources in school education. The School Resources Review was launched in 2013 to help countries exchange best practices and learn from one another, and to gather and disseminate evidence of what works in school resource policies. The project highlights issues and explores ideas for policy development that may be difficult to raise in national debates. It seeks to inform discussions among stakeholders with new and different perspectives that are based on research and evidence from different countries. This ambition also underpins the idea of the thematic comparative reports and the work behind them.

This report was co-authored by Luka Boeskens, Gonçalo Lima, Deborah Nusche (co-ordinator), Thomas Radinger and Claire Shewbridge from the OECD Directorate for Education and Skills. The work on this report was led by project managers Deborah Nusche (since December 2016) and Paulo Santiago (January to July 2016). Paulo Santiago co-ordinated the initial structure and extended outline of this report. Joris Ranchin led the initial stages of the qualitative data collection on countries' approaches to school funding. Eleonore Morena was responsible for the production and layout of the report and contributed to editing and proofreading. Meral Gedik, Florence Guerinot and Anne-Lise Prigent provided valuable advice on the production of the report. Cassandra Davis advised on communication and dissemination activities.

Acknowledgements

This report would not have been possible without the support of the 18 education systems actively engaged in the School Resources Review. Participating countries committed substantial resources and opened their school resource policies to review and debate. National co-ordinators (listed in Annex D) played a key role in this exchange, enriching discussions with their insights from particular contexts and co-ordinating their country's participation in the project.

The OECD Education Policy Committee and Group of National Experts (GNE) on School Resources, as well as the individual delegates to these bodies, provided essential support and analytical guidance since the inception of the project, and offered useful feedback on drafts of this report. At the time of publication of this report, the Group of National Experts was chaired by Mr Jørn Skovsgaard, Senior Advisor of the Danish Ministry of Education; and had as vice-chairs Ms Marie-Anne Persoons, Advisor International Policy in the Strategic Policy Support Division of the Flemish Ministry of Education and Training and Mr Matej Šiškovič, Director of the Educational Policy Institute at the Slovak Ministry of Education, Science, Research and Sports. Ms Shelley Robertson, Chief Advisor International Education, New Zealand Ministry of Education, served as vice-chair for the GNE from May 2014 to May 2015 and chaired its 1st meeting. The dedication and leadership of the chair and vice-chairs is gratefully acknowledged.

The School Resources Review and this report also benefited substantially from the active involvement of different stakeholders with an interest in education. The Business and Industry Advisory Committee to the OECD (BIAC) and the Trade Union Advisory Committee to the OECD (TUAC) participated in meetings of the Group of National Experts on School Resources as permanent observers and commented on drafts of this report. During individual country reviews, students, parents, teachers, school leaders, researchers and employers made their time available to meet with review teams and to provide their perspective of school resource policy issues.

Within a broader framework of collaboration, a partnership with the European Commission (EC) was established for the OECD School Resources Review, as part of which this report was prepared. The support of the EC covers part of the participation costs of countries which are part of the European Union Erasmus+ programme and contributes significantly to the preparation of the series of thematic comparative reports, including this report on school funding. The support of the European Commission for the School Resources Review is gratefully acknowledged. The review team would like to thank in particular current and former colleagues at the EC Directorate-General for Education and Culture, *Unit A.2: Education and Training in Europe 2020* under the leadership of Michael Teutsch (until December 2016) and Denis Crowley (since January 2017) and deputy leadership of Mónika Képe-Holmberg, and *Unit B.2: Schools and Multilingualism* under the leadership of Sophie Beernaerts (until December 2016) and Michael Teutsch (since January 2017) and

deputy leadership of Diana Jablonska. Unit A.2 co-ordinated the collaboration at the EC and contributed to the individual country reviews (see Annex D).

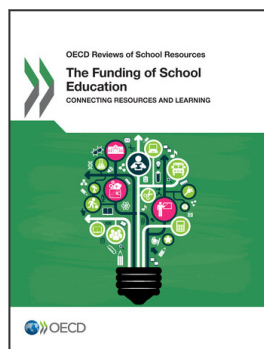
In addition, collaboration with Eurydice, the Inter-American Development Bank (IDB), the Organising Bureau of European School Student Unions (OBESSU), the Standing International Conference of Inspectorates (SICI), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the UNESCO International Institute for Educational Planning (IIEP-UNESCO) and the World Bank, ensured synergies between the work undertaken by different organisations and provided valuable input into the project and this report.

The review is indebted to the many individual experts who contributed to the country review visits and the resulting country review reports that are part of the publication series *OECD Reviews of School Resources* (for the composition of the country review teams, see Annex D). Their expertise, analytical contributions to the country-specific reports and professional exchanges with OECD Secretariat members provided the foundation for analysing school funding from a comparative perspective in this report. The country background reports prepared by participating countries provided a further important source of information and thanks are due to all those who contributed to these reports. In addition to this publication, by June 2017, the review had generated 16 reports by participating countries, 10 reports by external review teams and several research papers (all available on the OECD website at www.oecd.org/education/schoolresourcesreview.htm).

Within the OECD Directorate for Education and Skills, from its inception until the publication of this report, the review was carried out by the Early Childhood and Schools Division under the leadership of Michael Davidson (from January 2013 to September 2014) and Yuri Belfali (from October 2014 to July 2016) and by the Policy Advice and Implementation Division under the leadership of Paulo Santiago (since August 2016). Deborah Nusche (co-ordinator since December 2016), Thomas Radinger, Paulo Santiago (co-ordinator between January 2013 and July 2016) and Claire Shewbridge were responsible for the review, assuming leadership for the analytical work and individual country reviews. Important analytical contributions to the project were made by Anna Pons (who led the review of Kazakhstan) and Tracey Burns (who participated in the review of Uruguay). Eleonore Morena (since November 2014), Elizabeth Zachary (from October 2013 to December 2014) and Heike-Daniela Herzog (from January 2013 to September 2013) took responsibility for the administrative work within the review, the organisation of meetings and communication with the countries.

Gratitude is also extended to current and former team members who supported the work of the project at different stages. Macarena Ares Abalde, Francesc Masdeu Navarro and Alette Schreiner provided substantial input into the project's knowledge base. Luka Boeskens, Tala Fakhrazadeh, Anna Gromada, Gonçalo Lima, Kerstin Schophol, Oliver Sieweke and Antoine Papalia provided research assistance and summarised key areas of the literature on school resources during their internships with the review. The Jaume Bofill Foundation sponsored the secondment of Macarena Ares Abalde (March to August 2013) and Francesc Masdeu Navarro (November 2013 to November 2014), and the Ministry of Education and Research of Norway sponsored the secondment of Alette Schreiner (September to December 2013) with the OECD Secretariat. The German Academic Exchange Service (*Deutscher Akademischer Austauschdienst*, DAAD) and the German National Academic Foundation sponsored Luka Boeskens' appointment with the OECD Secretariat as a Fellow of the Carlo Schmid Programme.

A larger group of colleagues within the OECD provided advice at key stages. In particular, collaboration was established with the Programme for International Student Assessment (PISA), the Teaching and Learning International Survey (TALIS), the INES Network for the Collection and the Adjudication of System-Level Descriptive Information on Educational Structures, Policies and Practices (NESLI), the Centre for Educational Research and Innovation's (CERI) work on Governing Complex Education Systems, the Learning Environments Evaluation Programme (LEEP), the Fiscal Network in the Economics Department and the Budgeting and Public Expenditures and Public Sector Integrity Divisions in the Directorate for Public Governance and Territorial Development.



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