

ANNEX D

How the School Resources Review was conducted

Governance of the review

The School Resources Review is overseen by a Group of National Experts (GNE) on School Resources, a subsidiary body of the OECD Education Policy Committee. The GNE on School Resources guides the review and facilitates the exchange of information and experiences concerning school resources among countries. The GNE on School Resources has been chaired by Mr Jørn Skovsgaard, Senior Advisor, Danish Ministry of Education, and vice-chairs Ms Marie-Anne Persoons, Policy advisor, Flemish Ministry of Education and Training and Mr Matej Šiškovič, Director, Education Policy Institute, Ministry of Education, Science, Research and Sport of the Slovak Republic.

Between May 2014 and May 2017, the GNE on School Resources held four official meetings at the OECD Conference Centre in Paris. These were open to all OECD member countries and observers to the Education Policy Committee as well as to the Trade Union Advisory Committee to the OECD (TUAC) and the Business and Industry Advisory Committee to the OECD (BIAC). The project is conducted in co-operation with a range of international organisations to reduce duplication and develop synergies. In particular, within a broader framework of collaboration, a partnership with the European Commission (EC) is established for this project (see below). The review of Kazakhstan was undertaken in co-operation with the World Bank. Other international agencies collaborating with the project include Eurydice, the Inter-American Development Bank (IDB), the Organising Bureau of European School Student Unions (OBESSU), the Standing International Conference of Inspectorates (SICI) and the United Nations Educational, Scientific and Cultural Organization (UNESCO).

National co-ordinators

Each participating country appointed a national co-ordinator, who was responsible for: communications with the OECD Secretariat and within the country about the review; ensuring that the country background report was completed on schedule; liaising with the OECD Secretariat about the organisation of the review team visit, for those countries which opted for a country review; attending meetings of the Group of National Experts on School Resources; co-ordinating country responses to the review's qualitative survey on school funding; co-ordinating country feedback on draft materials; and assisting with dissemination activities. National co-ordinators are listed in Table D.1.

Table D.1. **National co-ordinators in participating countries**

Country	National co-ordinator(s)
Austria	Bernhard Chabera, Austrian Federal Ministry for Education
Belgium (Flemish Community)	Marie-Anne Persoons, Flemish Ministry of Education and Training
Belgium (French Community)	Philippe Dieu, International Relations Directorate of the Federation Wallonia-Brussels
Chile	Eduardo Candia Agusti, Chilean Ministry of Education Carla Guazzini, Chilean Ministry of Education
Czech Republic	Lucie Priknerová, Czech Ministry of Education, Youth and Sports Michael Vlach, Czech Ministry of Education, Youth and Sports
Denmark	Jon Jespersen, Danish Ministry of Education Sigrid Lundetoft Clausen, Danish Ministry of Education
Estonia	Kadi Serbak, Estonian Ministry of Education and Research
Iceland	Sigríður Lára Ásbergisdóttir, Icelandic Ministry of Education, Science and Culture
Kazakhstan	Zhannat Mussina, Information Analytic Center Assem Satmukhambetova, Information Analytic Center
Lithuania	Aidas Aldakauskas, Lithuanian Ministry of Education and Science Vilma Bačkiūtė, Lithuanian Ministry of Education and Science
Luxembourg	Amina Kafai, Luxembourg Ministry of National Education and Vocational Training Charlotte Mahon, Luxembourg Ministry of National Education and Vocational Training
Portugal	Ana Neves, Portuguese Ministry of Education
Slovak Republic	Matej Šiškovič, National Institute for Educational Assessment
Slovenia	Klemen Surk Kokalj, Slovenian Ministry of Education, Science and Sport
Spain	Vicente Alcañiz, National Institute for Educational Assessment Isabel Couso Tapia, Spanish Ministry of Education, Culture and Sport
Sweden	Gunnar Stenberg, Swedish Ministry of Education and Research Merja Strömberg, Swedish Ministry of Education and Research
Uruguay	Cecilia Llambi, National Institute for Educational Evaluation Cecilia Oreiro, National Institute for Educational Evaluation

Collaboration with the European Commission

Within a broader framework of collaboration, a partnership with the European Commission (EC) was established for this project. The support of the EC covers part of the participation costs of countries which are part of the European Union's Erasmus+ programme and contributes significantly to the preparation of the series of thematic comparative reports. Within the EC's Directorate-General for Education and Culture, the collaboration was organised by *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 Mónica 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. Through its country analysis work the EC contributed to planning individual country reviews in the countries listed in Table D.2, and provided feedback on draft country reviews and the drafts of this thematic comparative report.

Table D.2. **European Commission contribution to country reviews**

Country	EC Country Desk Officer contributing to the planning of the review
Slovak Republic	Christèle Duvieusart, European Commission
Estonia	Krzysztof Kania, European Commission
Belgium (Flemish Community)	Patricia De Smet, European Commission
Denmark	Joanna Basztura, European Commission
Czech Republic	Christèle Duvieusart, European Commission
Lithuania	Joanna Basztura, European Commission
Austria	Klaus Koerner, European Commission

Country background reports

Information on countries' policies and practices was gathered through country background reports (CBRs). The CBRs were prepared in response to a common set of issues and questions, and used a common framework to facilitate comparative analysis and maximise the opportunities for countries to learn from each other. The CBRs were a key source of information for the review's thematic comparative reports. The guidelines for the preparation of CBRs are set out in a dedicated document [EDU/EDPC(2013)11/REV1], also available on the review website (www.oecd.org/education/schoolresourcesreview.htm). The CBRs were structured around the following main chapters:

1. The national context
2. The school system
3. Governance of resource use in schools
4. Resource distribution
5. Resource utilisation
6. Resource management

The CBRs were intended for four main audiences: The Secretariat and OECD member and observer countries as an aid to sharing experiences and identifying common problems and policy options; the team of external reviewers who visited the countries which opted for a country review; those interested in the use of school resources in the country concerned; and those interested in the use of school resources at international level and in other countries. All CBRs are available on the review website (www.oecd.org/education/schoolresourcesreview.htm).

Qualitative data collection

In addition to the country background reports, the School Resources Review collected information on countries' national approaches to school funding through a qualitative questionnaire prepared by the OECD Secretariat. Seventeen systems participated in this qualitative data collection. The questionnaire focused on formal requirements for funding in terms of laws and regulations for early childhood and school education that were in place in 2016. It did not cover observed practices which can vary considerably. The questionnaire covered the following issues: raising resources for education; the public funding of private providers; budgeting and planning procedures; the distribution of current and capital expenditure; targeted funding; VET funding; the use of funding at the school level; and monitoring and reporting procedures.

The qualitative survey provided crucial information to complement the information available through CBRs and to support the review's analysis. Most of the information gathered through the survey is published in a set of comparative tables included in this report. The review team made every effort to ensure in collaboration with countries that the information available in this report is as valid and robust as possible and reflects specific country contexts while being comparable across countries. However, given the complex nature of school funding and the qualitative nature of this survey, information should be interpreted with care. Country contacts for the qualitative data collection are listed in Table D.3.

Table D.3. **Country contacts for the qualitative data collection**

Country	Country contact(s)
Austria	Bernhard Chabera, Austrian Federal Ministry for Education
Belgium (Flemish Community)	Marie-Anne Persoons, Flemish Ministry of Education and Training
Belgium (French Community)	Philippe Dieu, International Relations Directorate of the Federation Wallonia-Brussels
Chile	Eduardo Candia Agusti, Chilean Ministry of Education Carla Guazzini, Chilean Ministry of Education
Czech Republic	Lucie Priknerová, Czech Ministry of Education, Youth and Sports
Denmark	Jon Jespersen, Danish Ministry of Education
Estonia	Kadi Serbak, Estonian Ministry of Education and Research
Iceland	Gunnar Jóhannes Árnason, Icelandic Ministry of Education, Science and Culture
Israel	Daniel Levi-Mazloum, Israeli Ministry of Education Yoav Azulay, Israeli Ministry of Education
Kazakhstan	Dilyara Tashibaeva, Information Analytic Center Saniya Boranbayeva, Information Analytic Center
Lithuania	Jurga Zacharkienė, Lithuanian Ministry of Education and Science
Portugal	Ana Neves, Portuguese Ministry of Education
Slovak Republic	Ján Toman, National Institute for Educational Assessment
Slovenia	Klemen Surk Kokalj, Slovenian Ministry of Education, Science and Sport
Spain	Isabel Couso Tapia, Spanish Ministry of Education, Culture and Sport José María Gallego, Spanish Ministry of Education, Culture and Sport
Sweden	Gunnar Stenberg, Swedish Ministry of Education and Research
Uruguay	Lucía Castro, National Institute for Educational Evaluation Cecilia Oreiro, National Institute for Educational Evaluation

Country review reports

Another major source of material for this report was the set of country review reports prepared by the external review teams that visited participating countries engaging in a full country review. By providing an external perspective on the use of school resources in the countries concerned, the country review reports were also intended to contribute to national discussions, as well as inform other countries about policy innovations underway. The country review reports were also published as a publication series, *OECD Reviews of School Resources*, in order to enhance the visibility of these country-specific outputs as part of the review.

For each country visited, a team of up to five reviewers (including at least two OECD Secretariat members) analysed the country background report and associated materials and subsequently undertook an intensive case study visit over the course of about seven days. The reviewers were selected in consultation with the country authorities to ensure that they had experience relevant to the main policy issues in the country concerned. The study visit aimed to provide the review team with a variety of perspectives on the governance, distribution, management and utilisation of school resources and included meetings with education and finance authorities at national and sub-national levels; relevant agencies (e.g. audit offices); teacher professional organisations and unions; parents' organisations; representatives of schools and school leaders; students' organisations; teacher educators; researchers; as well as students, teachers and school leaders at the schools visited. The objective was to accumulate sufficient information and understanding on which to base the analysis and policy recommendations.

At the time of publication, 10 review visits were conducted, involving 21 external reviewers with a range of research and policy backgrounds. The reviews involved a planning visit and a main review visit. Details on the composition of the review teams for

the main visits can be found in Table D.4. The country review reports are published on the project website (www.oecd.org/education/schoolresourcesreview.htm).

Table D.4. Country reviews and team members

Country	Review visit team
Kazakhstan 31 March-9 April 2014	Anna Pons, OECD Secretariat (co-ordinator) Jeremie Amoroso, World Bank Jan Herczyński, Institute for Educational Research, Poland Igor Kheyfets, World Bank Marlaine Lockheed, Princeton University, United States Paulo Santiago, OECD Secretariat
Slovak Republic 7-14 October 2014	Paulo Santiago, OECD Secretariat (co-ordinator) Gábor Halász, University Eötvös Loránd, Hungary Rosalind Levačić, Institute of Education - University of London, United Kingdom Claire Shewbridge, OECD Secretariat
Estonia 20-27 October 2014	Paulo Santiago, OECD Secretariat (co-ordinator) Anthony Levitas, Brown University, United States Péter Radó, Education Consultant, Hungary Claire Shewbridge, OECD Secretariat
Belgium (Flemish Community) 3-10 November 2014	Deborah Nusche, OECD Secretariat (co-ordinator) Gary Miron, Western Michigan University, United States Paulo Santiago, OECD Secretariat Richard Teese, University of Melbourne, Australia
Lithuania 2-9 December 2014	Claire Shewbridge, OECD Secretariat (co-ordinator) Katrina Godfrey, Department of Education of Northern Ireland, United Kingdom Zoltán Hermann, Institute of Economics - Academy of Sciences, Hungary Deborah Nusche, OECD Secretariat
Uruguay 17-25 March 2015	Paulo Santiago, OECD Secretariat (co-ordinator) Beatrice Ávalos, Universidad de Chile, Chile Tracey Burns, OECD Secretariat Alejandro Morduchowicz, Inter-American Development Bank Thomas Radinger, OECD Secretariat
Denmark 22-29 April 2015	Deborah Nusche, OECD Secretariat (co-ordinator) Torberg Falch, Norwegian University of Science and Technology, Norway Thomas Radinger, OECD Secretariat Bruce Shaw, Ontario Ministry of Education, Canada
Czech Republic 26 May-2 June 2015	Claire Shewbridge, OECD Secretariat (co-ordinator) Jan Herczyński, Institute for Educational Research, Poland Thomas Radinger, OECD Secretariat Julie Sonnemann, Education Consultant - Learning First, Australia
Austria 24-30 June 2015	Deborah Nusche, OECD Secretariat (co-ordinator) Marius Busemeyer, University of Konstanz, Germany Thomas Radinger, OECD Secretariat Henno Theisens, The Hague University of Applied Sciences, Netherlands
Chile 22-30 September 2015	Paulo Santiago, OECD Secretariat (co-ordinator) Ariel Fiszbein, Inter-American Dialogue, United States Sandra Garcia Jaramillo, Universidad de los Andes, Colombia Thomas Radinger, OECD Secretariat

Analytical background papers

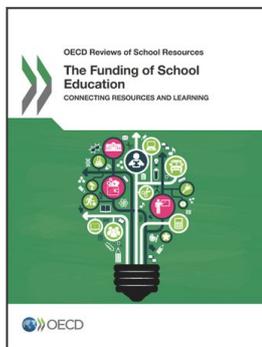
The School Resources Review was also informed by the following analytical background papers and literature reviews prepared in the context of the project:

- Ares Abalde, M. (2014), “School Size Policies: A Literature Review”, *OECD Education Working Papers*, No. 106, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jxt472ddkjl-en>.
- Masdeu Navarro, F. (2015), “Learning support staff: A literature review”, *OECD Education Working Papers*, No. 125, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jrnzm39w45l-en>.

- Gromada, A. and C. Shewbridge (2016), “Student Learning Time: A Literature Review”, *OECD Education Working Papers*, No. 127, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jm409kqqkjh-en>.
- Fakharzadeh, T. (2016), “Budgeting and Accounting in OECD Education Systems: A Literature Review”, *OECD Education Working Papers*, No. 128, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jm3xgsz03kh-en>.
- Boeskens, L. (2016), “Regulating Publicly Funded Private Schools: A Literature Review on Equity and Effectiveness”, *OECD Education Working Papers*, No. 147, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jln6jcg80r4-en>.
- “Targeted School Funding: A Literature Review” by Kerstin Schopohl (under review).
- “Funding Education for Students with Special Educational Needs: A Literature Review” by Oliver Sieweke (under review).
- “The Funding of Vocational Education and Training: A Literature Review” by Antoine Papalia (under review).
- “Conceptualising and Measuring Efficiency and Equity in the Use of School Resources” by Gonçalo Lima (under review).

Dissemination

To facilitate dissemination and encourage feedback, all project documents and outputs were published on the review’s website (www.oecd.org/education/schoolresourcesreview.htm). Throughout the review, the OECD Secretariat presented the project and its findings at a wide range of internal and external meetings and a significant number of countries organised national events to discuss both the international results from the review and the conclusions of specific country reviews.



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