

SWG “The History of Educational Funding: Models, Debates and Policies in an International Perspective (1800-2000)”

Annual report 2018

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General information

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Purpose of the SWG

Educational funding is vital for our understanding of mass schooling. As Brian Simon once noted, finance is “the life blood of any system that requires effective resources for healthy functioning¹” An increasing number of researchers – both in history of education and in economic history – have consequently addressed various aspects of the economic and financial dimension of primary, secondary and tertiary education². Economic historians have investigated how variations and changes in educational expenditure have been linked to, for example, factors such as wealth inequality, political voice and fiscal capacity, social historians have explored systems of local funding, and historians and educationalist have also explored finance from a policy-perspective.

1 Brian Simon’s preface to Norman Morris, *The Politics of English Elementary School Finance 1833–1870*, Lewiston: Edwin Mellen, 2003, p. iii.

2 Marcelo Caruso, « Why Do Finance? A Comment About Entanglements and Research in the History of Education », *Nordic Journal of Educational History*, vol. 2, n° 1, 2015, p. 141–149.

Despite the immense contributions of these studies, there nevertheless remains a wide range of unanswered questions. Much work has focused on a specific level of funding (local, national, international) or a specific level of schooling (primary, secondary, higher education). There is still much to be learned by emphasizing the interdependence of different levels of funding, especially during transitional stages – e.g. from decentralized to centralized systems – and the transfer of funding models from one level to the other – e.g. from primary to secondary education. Moreover, contemporary issues like school vouchers, student loans and more generally the funding of university – studied by sociologists and economists – would be more clearly apprehended if situated in a broad historical perspective. Finally, the relation between funding models and the content of educational policies needs to be further analyzed.

The purpose of this standing working group is to stimulate the growing research in the history of educational finance by bringing researchers of different disciplines and nationalities together. Thus, our standing working group will foster a dialogue between quantitative and qualitative approaches, and promote international comparative perspectives on education funding. One of our goals is to go beyond the comparison among limited territories of similar countries (“developing countries”, European and North American countries, BRICS etc.) to build a global comprehension of these phenomenon. On the one hand, we will try to use the comparative approach as a tool to better identify and analyze common trends; on the other hand, we will be attentive to the transnational circulation of different funding models, as well as to local receptions and appropriations according to specific political, economic or pedagogic settings.

Past and current activities (2018-2019)

Workshops and meetings

- ERASMUS+ exchange (visit by Clémence Cardon-Quint to Örebro University, 1 week, april 2018)
- August 28th, 2018, Berlin : pre-conference workshop, 21 attendees
- Depending on the answers to our CFP , we plan one or two webinars in Spring (see CFP below). Those webinars would target specific topics and contribute to the elaboration of a common framework for future publications.
- July 16-20th, 2019, Porto : parallel sessions during the ISCHE conference.

Methods of group communication

- Last December, we have set up a discussion list, first intended for the members, but open to all : h_fundingeducation@groupe.renater.fr
This discussion list has 38 subscribers.
- We are considering creating a blog for the SWG.

Call for papers for ISCHE 41

The proposals for ISCHE 41 in Porto may address one of the four topics specified below, or simply the open section “New perspectives in the history of educational funding”. Independent and voluntary webinars may be held in Spring 2019, for thematic sections 2-4, depending on the number of proposals received. These webinars will help to build a common culture (bibliographical references, sources, definitions, presentation of national contexts) and will lead to even more fruitful and focused discussions in Porto. The webinars will also initiate an editorial process leading to collective publications and, if relevant, the development and submission of a collective research project.

1. Discussing sources, tools and methods

One of the main conclusions of our pre-conference workshop in Berlin was the lack of opportunities to discuss sources and methodological issues related to the history of school financing. ISCHE 41 in Porto will give us the opportunity to address these issues during one dedicated session. This session will be the place to present sources, tools, methodological strategies (both quantitative and qualitative methods), but also to discuss obstacles and difficulties. Among the questions that could be discussed:

- What kind of qualitative and quantitative evidence may be used to study the history of educational finance?
- What data are accessible (online or in the archives) for the context you are studying?
- What precautions should be taken before applying quantitative methods to historical series?
- What strategies should be applied to deal with data gaps, asymmetries, or overloads?
- How have the social sciences of quantification³ changed our apprehension of financial data?

2. Spending more, spending differently? Funding quality in education

Researchers interested in school funding have often focused on increases in expenditure related to the quantitative extension of schooling (be it in primary, secondary or higher education). However, improving the quality of education may require increasing expenditure per student. Papers addressing this issue of funding and quality may deal with some of the following questions:

- Can we observe and measure shifts in educational expenditures, linked with local or national policies aimed at improving the quality of the service provided?
- What are the arguments and strategies used to mobilize more resources for the same number of students?

³ Alain Desrosières, *La politique des grands nombres: histoire de la raison statistique*, Paris, France, La Découverte, 2010, 456 p. Isabelle Bruno, Florence Jany-Catrice et Béatrice Touchelay (eds.), *The social sciences of quantification from politics of large numbers to target-driven policies*, Cham, Suisse, Springer (coll. « Logic, argumentation & reasoning 13 »), 2016, 1 vol. (XI-204 p.).

- Do these shifts lead to a new funding model (centralization/decentralization process; input of private actors; mobilization of the families, of local authorities etc.)?

In this context, current efforts at a marketization of education are, obviously, of particular relevance.

3. Money from abroad? International /transnational/ foreign resources for school funding

In an era of international organizations and businesses, international political issues, and increasingly global communications due to the technical developments, educational and historical research has placed greater emphasis on the international and cross-national level. Approaches used to examine such phenomena of an international and transnational character has multiplied to include connected histories, entangled history, *histoire croisée*, but also world history, global history, and transnational history. In this context, we welcome papers that in various ways address issues of the impact of international organizations (UNESCO, World Bank, UNICEF, OECD, IEA) and NGOs on school finance, especially in the Global South, but also papers addressing transnational processes of, e.g., borrowing and lending within this field, and international comparative studies of school finance.

4. School finance between state and local school districts

The relationship between central governments and local governing bodies remain fundamental to the historiography of education. We welcome papers addressing this theme from the perspective of school finance. Papers may deal with the political debate on the funding of national educational systems (primary, secondary, tertiary level), the design of state subsidies and their impact, and so forth.

5. New perspectives in the history of educational funding (open section)

Submission process

Proposals should be a maximum of 500 words excluding bibliography. The deadline for submission of papers to any SWG is January 31, 2019.

Please note that all proposals must be submitted through the conference electronic system by selecting the respective SWG in the Abstracts area.

Authors will be informed by March 1, 2019.