

# The Schools Participatory Budgeting (SPB) in Portugal

*Pedro Abrantes, Alexandra Lopes & José Manuel Baptista*

The Schools Participatory Budgeting (SPB) was a political measure, announced by the Portuguese government in March 2016 and implemented, for the first time, in the network of public schools during the school year of 2016–17, in order to promote:

1. Democratic practices, values and skills;
2. The sense of school belonging, responsibility and well-being;
3. Financial literacy and entrepreneurship.

This measure acknowledges the young people's right to be involved in community life, and the need of innovative actions to assure this right, reinforcing skills, trust and participation in democratic institutions. Such involvement shall start at school, where young people spend most of their time in our societies and where they must have an active voice in the management decisions and project development. As established in the Portuguese National Strategy for Citizenship Education, also launched in 2017, this policy considers that it is not sufficient to learn citizenship and democracy by the books, through traditional methodologies, but that it is fundamental to experience it in concrete mechanisms of the institutions where young people take part, first of all, at school. In order to achieve this goals of citizenship and democracy, the role of educators is fundamental to support students' participation, but, and as defined in SPB, proposals shall be developed by students, according to their own ideas, preferences and needs.

Besides, this measure is also a path to engage students and foster their sense of belonging and responsibility at their own schools

and communities, promoting de-centralizing policies and specially school autonomy, linking students to the decision-making in their own school. Therefore, each school have its specific Participatory Budgeting, expressing its particular reality, and students' proposals shall be oriented towards their own schools improvement and regulations have some flexibility to be applied by each school according to their specific characteristics.

This programme also contributes to an increasing concern about the development of financial literacy skills. By taking part in the management of the school budget, students not only develop citizenship values and practices, but also deal with the concept of budget, as well as other associated concepts as expenses, revenues, priority or efficiency. And actually one of the interesting dimensions of this initiative is exactly to raise awareness among young people that political-civic participation and economic management are not worlds apart, but they are intertwined in current (democratic) societies.

Although interesting experiences were already developed in early ages in a smaller scale, this measure was oriented towards young people, aged 12-18, that is, the 3rd cycle of basic education (7th to 9th grades) and secondary students of all educational pathways (10th to 12th grades), since it is based on students' autonomy and some basic skills previously acquired. Still, one important principle was to include, under the same rules, students from all tracks of secondary education, including both vocational and scientific-humanistic paths.

### **Procedures**

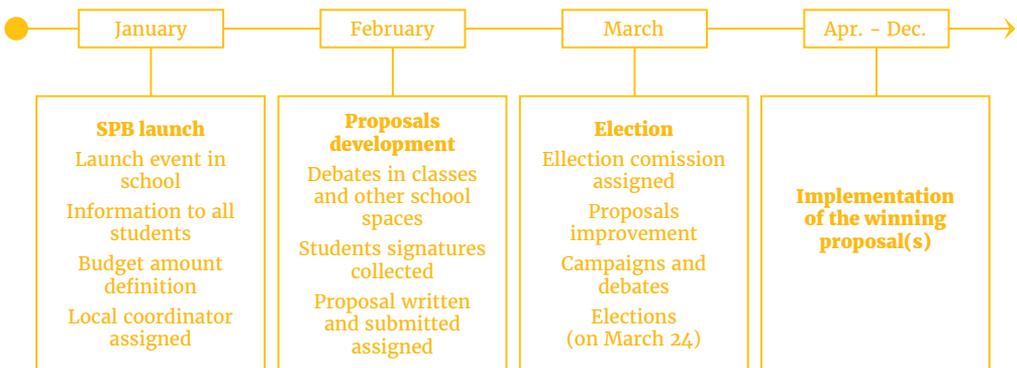
After listening the educational administration services and a sample of school headmasters, the main procedures of the School Participatory Budgeting were defined for all public schools with lower and/or upper secondary students in Portugal (around 1200 schools), by the Dispatch 436-A/2017, from January 6.

The main rules defined in this procedure are the following:

1. Each public school budget has a supplementary amount provided by the State, calculated according to the number of students in the 3rd cycle of basic education (7th to 9th grade) and in the secondary education (10th to 12th grade) and only able to be used if the SPB rules are followed;

2. This amount may be complemented by school own funds, municipal or other community contributions;
3. All students from the 3rd cycle of basic education and in the secondary education (in many countries, designated lower and upper secondary) shall be informed, by their schools, about the initiative and supported in their will to develop proposals and to vote on their preferences;
4. Proposals to use this budget must be designed, submitted and voted by the students in the abovementioned levels (elections shall be held in the Students' Day, on March 24, or in the nearest possible day);
5. Proposals shall benefit school services, equipment and/or educational activities, being a resource for the whole school community;
6. These proposals have to be viable, considering the budget available, the existing rules and the school projects, and they shall be endorsed by at least 5% of the students in the referred education levels;
7. The proposal with more votes shall be selected and implemented (if the budget enable it, the following more voted ones may be also selected).

In order to accomplish this rule, the following steps shall be followed in each school:



### Local and national structures

The local coordinator (the school principal or a teacher designated by him/her) has a key role:

- a) promoting students' and teachers' involvement and overcoming issues and doubts raised by them, in the first stage;
- b) analysing the proposals presented by students, if necessary, supporting them to improve their proposals (for instance, making them viable and/or merging similar proposals) and excluding at the end those proposals that does not meet the minimum requirements, in a second stage;
- c) assuring – with the support of a group of students assigned by the school board – that elections take place, and all students may vote according to the democratic SPB rules;
- d) supporting the implementation of the winning proposals, in the last stage.

There is also a national supporting structure, composed by the following services of the Ministry of Education:

- a) DG Schools (DGEstE), responsible for schools information, orientation and monitoring concerning the SPB;
- b) Institute for Financial Management of Education (IGeFE), responsible for providing and supervising schools budget, including the amount devoted to the SPB;
- c) General-Inspectorate of Education and Science (IGEC), responsible for the schools evaluation, including a particular procedure to evaluate the SPB in a sample of schools.

To disseminate this initiative it was also created, in 2016–2017 for the first edition, a national media campaign, specially oriented towards students, including:

a Facebook page – [www.facebook.com/opescolas](http://www.facebook.com/opescolas) – enhancing students' participation and disseminating good local initiatives;

an Whatsapp account – 910106937 – in order to contest to students' doubts and concerns;

a webpage – [www.opescolas.pt](http://www.opescolas.pt) – to inform all interested people, including students, teachers, parents, journalists, etc.

### **School Participatory Budgeting in Portugal (first edition, 2016–17): key figures**

The first edition included two monitoring procedures developed by the DG Schools and involving all public schools, in February and in May 2017, in order to assess the implementation of the process. In October, Inspectorate-General for Education and Science included some questions about the implementation of this measure in the sample of schools regularly analysed in the programme for Organization of the School Year Assessment (OAL). In November, there was a third follow-up procedure, run by the Institute for Financial Management of Education, focused on the administrative and financial transference held during the year according to SPB rules. Finally, in the first semester of 2018, the Inspectorate-General for Education and Science developed a specific programme to evaluate how this measure was implemented, including visits to a random sample of around 20% of schools to a more in-depth analysis.

This measure aimed to involve:

- 1 127 schools (all public schools with lower and upper secondary)
- 530 853 students (all students in public 3rd cycle of basic education and in secondary education)
- 720 710 € available for schools

The monitoring survey carried out in the beginning of May 2017 has shown that, in this first year, at least:<sup>1</sup>

- 1 046 schools implemented the SPB (93%)
- 4 371 proposals were submitted by students (80% considered acceptable by schools)
- 1 021 schools democratically elected students' proposals (91%)
- 221 063 students have voted for SPB (46%)

A key element of the process was the diversified ways used by schools, specially during January and February, to disseminate information and involve students. Almost all schools (85%) requested that teachers inform students about the initiative and used flyers and posters in visible areas of the buildings. Most of them used also the school website, social networks and e-mails to spread information on this initiative (74%) and involved students through special sessions and debates (64%). Many schools used also classes for the proposals development and debate (47%) or involved students' association in the dissemination process (41%).

Proposals were mostly focused on the acquisition of equipment and improvement of leisure and sociability spaces for students within schools (51%), although there were many proposals also on sports equipment (20%), improvement of school services (13%), educational resources (12%) and extracurricular activities (12%).

According to IGEC assessment on the Organization of the School Year, in October 2017, around half of the schools already had implemented the winning proposals from the election in the end of March. And the IGeFE supervision developed in November observed an execution rate of 95% of the available funds, not meaning that all measures were fully implemented, but that financial resources were already transferred and allocated to planned interventions.

Another interesting figure: from the 4 371 proposals submitted by students, 1 436 (around 1/3) were actually updated by the authors with the support of the local coordination, improving its quality, clarity and viability, while 883 (20%) were excluded by the coordi-

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1 The reference "at least" is due to the fact that schools that not answer to the survey (around 3%) were considered as not developing the SPG, which may be not always the case. For instance, these schools may have experienced electronic problems not allowing to answer before the deadline.

nation before the election, due to not meeting the SPB requirements. This is important in order to assure quality standards, concerning particularly the viability of the proposals, and therefore assuring that voted proposals are actually clear and able to be implemented, but also because the involvement of students in the improvement of their own proposals are very important opportunities to develop skills in negotiation and project development.

Finally, regarding the impacts of this initiative, according to the DG-EsTE monitoring procedure, 82% of the principals considered that “SPB contributed to the awareness and civic education of many students” and 69% stated that “SPB meant an effective improvement on students’ rights and participation in the school life”.

### Media coverage

There was a good media coverage of this initiative, highlighting the ability of students to participate in the improvement of their own schools, the main rules of the initiative, and some debates and proposals developed in schools (see some of the main news published in Portuguese newspapers in the annex “caderno de imprensa – OPE2017”). There was a significant interest in the beginning of January, when the initiative was officially launched by the government and all schools were invited to participate. A new interest was raised in mid-February with the symbolic presence of the Minister and Secretaries of State of Education in some schools, to attend to debates among students about their needs, preferences and how to elaborate proposals. Some reports were also broadcasted in national TV and radio channels<sup>2</sup>. Finally, some news were published since the end of March with references to public sessions where the winning proposals were introduced.

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<sup>2</sup> See, for instance, the following links:

TVI 24 - Jornal da Uma, 2017-02-14 14:13; TVI - Diário da Manhã, 2017-02-15 07:41  
<http://www.pt.cision.com/cp2013/ClippingDetails.aspx?id=7b3b4fbb-e33e-4938-8070-2d317bb09doe&userid=7847544c-8090-4b32-9693-0113f430007b&cp=1>  
 RTP 1 - Portugal em Direto , 2017-02-14 18:45; RTP 1 - Bom Dia Portugal , 2017-02-15 08:15  
<http://www.pt.cision.com/cp2013/ClippingDetails.aspx?id=ac5fcbaa-bf43-4832-b0b2-729148aac98e&userId=82b061bf-53e3-482f-9ef9-c9b6946f0b59&cp=1>  
 Rádio Renascença - Notícias, 2017-02-14  
<http://www.pt.cision.com/cp2013/ClippingDetails.aspx?id=e20ae83c-e8e2-4164-bb43-e190e3be001b&userId=82b061bf-53e3-482f-9ef9-c9b6946f0b59&cp=1>

### Concluding remarks

The introduction of the School Participatory Budgeting in the Portuguese educational system, in 2017, was an innovative and successful experience, generating an effective opportunity for students' democratic participation and development of civic (and financial) skills, as it was observed in the monitoring outcomes, briefly presented in this chapter.

It is important to stress that this was not an isolated measure, but it is integrated with other related initiatives as the elaboration of the Students' Profile at the End of Compulsory Education, the National Strategy for Citizenship Education or the replication in thousands of schools of the Students' Voice initiative. In different and complementary ways, these measures are improving the democratic character of our schools and creating effective opportunities for young generations to develop civic and democratic skills. This is established as one of the core goals of our educational system but it was until recently left to the voluntarism of some teachers and students, in many schools understood as a vague and declared aim, but actually only converted in concrete actions in occasional events, in contrast with the compulsory and routine activities focused on the learning of specific subjects, as Mathematics, Portuguese, etc. Consequently, the current initiatives are very significant, since they aim to include all schools and students, putting democracy at the heart of the school life.

Currently, the second edition is taking place and it will be interesting to observe if the effect of novelty is progressively adopted in the regular life of the more than 1,000 schools of the public network offering the 3rd cycle of basic and/or secondary education.

