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FINANCING OF REGIONAL AND LOCAL PROGRAMS OF EDUCATIONAL OPPORTUNITIES EQUALIZATION

Abstract. The paper discusses difficulties connected with obtaining public fund for the realization of programs of educational opportunities equalization (competition and non-competition versions). The comparative studies have been prepared on the basis of two latest legislative solutions: program of assistance for children and youth from former State Agricultural Enterprises; regional programs of educational opportunities equalization. The article also includes the financial results of assistance forms accumulation in both competition and non-competition. The potential value of the obtained financial support highlights the threads of increasing the differences in the access to education. Promotion of the competition in the realization of the program of educational opportunities equalization will increase the existing territorial differences.

Key words: education opportunities equalization, public assistance, regional differences

Introduction

Signed by Poland in 1964, Convention against Discrimination in Education² has given the foundations for the implementation of programs of educational opportunities equalization. The word “Discrimination” in the understanding of the Convention means any favoritism, exclusion, limitation or promotion caused, among others, by material situation resulting in ‘... the partial or full limitation of the access to the education of any type’. The practical application of the Convention’s provisions can be found in the legal provisions of accepted government programs. These determine the groups of the help receivers, help criteria, help forms etc. Far less frequently assessed is the level of difficulty in receiving public funds for the realization of the programs of educational opportunities equalization. This article is attempting to compare the level of difficulty in receiving public funds for the realization of the programs of educational opportunities equalization depending on the type of the procedure: competition and non-competition. The comparative analysis has been undertaken on the example of two latest legislative projects: ‘The program of assistance for children and youth from the former State Agricultural Enterprises’ [PGR] and the regional programs of educational opportunities equalization. This article presents also the results of the financial accumulation of material assistance forms received via the competition and non-competition procedure. The level of the social encumbrances may stimulate research on the efficiency of financial inputs for this purpose in the public sector.

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² Dz. U. [*Journal of Laws*] 1964, no 40, item 268.

Competition procedure

Invitation for tenders is a more and more frequently used method of receiving bids for financial funds within the program of educational opportunities equalization. These procedures guarantee granting the funds only to the beneficiaries whose applications are recommended for subsidizing. In this situation the possibility of receiving funds is not determined by a final beneficiary's difficult situation but by the efficiency of the parties authorized to file the applications (territorial self-government units and public benefit organizations). This pro-competition procedure attitude requires:

- extensive knowledge of who organizes the competition, where and in which field;
- making a decision to take part in the competition and appointing people responsible for the preparation of the application;
- professional preparation of the application resulting in a good formal and legal assessment that will be a basis for the recommendation of the application;
- guarantying an appropriate level of own funds in the total costs of educational project realization.

In the competition there is a necessity of the recognition of winners. This situation results in a differentiation of the level and the scope of provided educational assistance. Consequently, this causes the increase of the differences in the access to educational services among people in a difficult economic situation. The threat for the realization of the educational opportunities equalization program may be observed on the example of the state program of supporting the foundation and realization of the regional and local programs of educational opportunities equalization for children and youth in 2006 'Activation and support of territorial self-government units and non-governmental organizations in the scope of providing school children with educational material assistance'.

Competitions for assistance from the regional and local programs of educational opportunities equalization are organized by a provincial governor on the basis of the Regulation of the Council of Ministers of 28 March 2006 establishing the details of financing regional and local programs of educational opportunities equalization for children and youth in 2006, requirements that shall be met by the programs, bodies evaluating the programs and the method of the selection of the programs to be subsidized³. Invitations to competitions include the following information:

³ Journal of Laws no. 59, item 411

1. An example of the application with a fill-in guide. Governors do not have strict restrictions in this area. In accordance with the provisions of the abovementioned Regulation the application should contain the following:
 - 1) a program with an explanation, aim and form of the program realization and expected results;
 - 2) program launch and completion dates;
 - 3) the scope of undertaken actions aiming at the educational opportunities equalization for children and youth;
 - 4) a detailed description of activities;
 - 5) costs calculation, including information on:
 - a) financing sources,
 - b) the amount of the expected subsidy,
 - c) income and costs structure;
 - 6) information on the program's compliance with a regional or local education policy.

For example, an application form was very simplified in Dolnośląskie province. It included only six abovementioned topics. However governors were in the right to prepare more sophisticated application form using e.g.:

 - an example of an offer for public task realization⁴,
 - EU funds application generator.

The differentiation of the application fill-in difficulty level could result in a differentiation of chances to obtain funds for the realization of programs of educational opportunities equalization.
2. Time for filing an application up to April 28, 2006 (one month after issuing the regulation). Setting such a short period of time might promote bodies with a project concept prepared in advance (e.g. for another competition). Governors did not issue the information about an example of application form simultaneously. Consequently the actual time for filing an application varied across the country. Failing to meet the time limit could result in the exclusion from the competition procedure. Complaints of potential applicants resulted in the extension of the period to May 15, 2006 (amendment to the Regulation⁵).
3. Time for reviewing applications up to May 12, 2006 (and extended to May 26, 2006 because of the filing period extension).

⁴ Journal of Laws 2005 no. 264, item 2207.

⁵ Journal of Laws 2006 no. 73, item 503.

The governor appoints a team for formal, substantial and financial evaluation of the applications. The team determines the way of selecting programs to be subsidized. The team is obliged to evaluate the motions with a consideration of the following:

- 1) completeness and formal correctness;
- 2) substantial quality of a program (including its range and estimated results);
- 3) compliance with a regional or local education policy;
- 4) reasons for program's existence (including possibility of solving or decreasing existing educational problems and using local and regional potential);
- 5) justification for planned costs;
- 6) level of servicing costs;
- 7) real possibility of the program realization.

Each province could have its own system of particular evaluation criteria. Thus, this is the next element of the procedure which could differentiate the access to public funds for the realization of the program of educational opportunities equalization.

The lack of own funds could also be a major obstacle. The subsidy granted by a governor equals the amount of own funds engaged by an applicant in his program realization (1:1). Failure to dedicate funds from a budget meant no chances for the realization of the local programs of educational opportunities equalization.

The total value of the subsidies granted by a governor could not exceed the funds for financing governor's programs. This determined the level of applicants' expected own contributions. In several regions applicants' financial needs could exceed the subsidies granted for the province. However, this financial situation would not influence the increase of the tasks co-financed by the state budget.

Introduction of the competition for receiving public funds stimulates creative attitude at the local level. However in the realization of the program of educational opportunities equalization this method causes the division of potential beneficiaries into two groups: receiving state's help and not receiving the help.

Non-competition procedure

The non-competition realization of the program of educational opportunities equalization eliminates the risk of exclusion from the group of final beneficiaries. With this method public funds redistribution better fulfills the idea of educational opportunities equalization. The state program of subsidizing students from the families of the former

employees of State Agricultural Enterprises⁶ may illustrate this statement. In this case the potential beneficiaries of the subsidy may not receive it only because of their own negligence. Here only filing simplified set of necessary documents within a settled time limit decides on the scholarship granting. The only real difficulty might be the potential beneficiaries' lack of knowledge on the possible forms of support. However even this risk is significantly reduced by a large group of applicants with the right to name candidates for a scholarship. Apart from parents the representatives of the following institutions are also the applicants:

- schools attended by a student: headmaster, teachers;
- social assistance institutions: social worker;
- other persons.

Difficulties in meeting requirements are often considered inadequate to the amount and form of the offered support. The scholarships for children and youth of the former employees of State Agricultural Enterprises seem to negate this common attitude.

Meeting the requirements of applying for the scholarship is not troublesome. The criteria include:

- 1) the financial situation of the student's family: the income per one person in the family must not exceed 532 PLN (on the basis of parents' statements from the last three months);
- 2) the student's place of residence: living in a village or in a town up to 20 000 inhabitants;
- 3) being a member of a family of the former employees of State Agricultural Enterprises;
- 4) certifying the continuation of education in a post-intermediate school enabling receiving a baccalaureate certificate;
- 5) granting a scholarship at least for year 2005 by the Agricultural Property Agency to December 31, 2004.

Collecting the necessary documents is also simple:

1. Filling in an application (obligatory information: student's name and last name and his/her parents' names and last names, place of residence, name and address of student's school, description of the expected form of a scholarship);
2. Attachments to the application:
 - financial statement of student's family,

⁶ Dz. U. of 2006 Nr 73, poz. 502

- acknowledgment, decision or any other document confirming granting a scholarship of Agricultural Property Agency for at least 2005. If it is impossible to present such a document the school superintendent issues a certificate confirming the granting of the scholarship by the Agricultural Property Agency.

The deadline for filing scholarship applications was May 22, 2006. Any delay in filing the application does not deprive a beneficiary of the scholarship. In properly justified situations it is possible to file the application after the deadline.

This form of help is attractive because of:

- the form, amount and frequency of payments;
- description of the scholarship aim;
- the period of scholarship granting;
- convenient administrative servicing of the scholarship.

The scholarship may have the following forms:

- 1) direct coverage of the expenses related to education;
- 2) allowance, after proving the expenses related to education.

A student may receive the amount of 50 PLN as pocket money payable beforehand to the 10th day of each month. The scholarship is granted for the time until the graduation from a post-intermediate school enabling to receive a baccalaureate certificate (not longer than to June 2008). The scholarship is granted from September to June in each school year. The scholarship may be realized in periods other than months. Graduates who in the school year 2005/2006 have finished post-intermediate school enabling to receive a baccalaureate certificate are the only exception. In this situation the subsidy is payable in a lump-sum in cash before June 23, 2006. The subsidy is for a partial or complete coverage of the expenses related to education, in particular:

- 1) food,
- 2) dormitory payments,
- 3) transport to school,
- 4) school books,
- 5) necessary clothes and shoes,
- 6) foreign languages lessons and other classes conducted in the school or out of it and school trips.

The amount of the scholarship is 200 PLN monthly, but the total amount of the scholarship in a school year must not exceed 2000 PLN (for comparison a social scholarship is 44.80 – 112 PLN monthly). The scholarship is granted by the student's school (if it is

managed by district educational authority). In the remaining cases the scholarship is granted by a district starost appropriate for the school. It is worth mentioning that receiving the scholarship is guaranteed up to 2008.

Financial consequences of the accumulation of support forms in educational opportunities equalization programmes

Presently are functioning in Poland several programs of educational opportunities equalization that are financed or co-financed by the state budget. The calculations presented below are examples of accumulation of support forms ensuing from the right to receive scholarships from different sources: school, EU, former State Agricultural Enterprises and within local or regional programs of educational opportunities equalization. Additionally the scholarships have been extended by two more forms of material assistance determined by:

- the state program of school starting conditions equalization “School starter kit”⁷;
- the Law of November 28, 2003 on family benefits⁸ (supplements to child allowances).

The calculations consider three educational stages of the beneficiaries:

- I: classes: 1-3 of elementary school;
- II: classes: 4-6 of elementary school;
- III: classes: 1-3 of junior high school and post-intermediate school education.

The financial results of assistance forms accumulation in elementary school vary depending on the age of the beneficiary:

Class 1: social scholarship, school starter kit, supplements to child allowance, regional scholarship.

Expenses: 1) the social scholarship (minimal amount: 10 months x 44.80 PLN = 448 PLN; maximal amount: 10 months x 112 PLN = 1120 PLN);

2) the school starter kit (material assistance in the school books purchase up to the amount of 100 PLN);

3) the supplement to child allowance for the beginning of a school year (single payment of 90 PLN);

4) regional scholarship (approximately 50 PLN monthly x 10 months = 500 PLN).

Total expenses: from 1138 PLN to 1810 PLN (yearly).

Classes 2-6: social scholarship, supplements to child allowance, regional scholarship.

⁷ Journal of Law 2005 no. 69, item 611

⁸ Journal of Law 2003 no. 228, item 2255 as amended

Expenses: 1) the social scholarship (minimal amount: 10 months x 44.80 PLN = 448 PLN; maximal amount: 10 months x 112 PLN = 1120 PLN);
2) the supplement to child allowance for the beginning of a school year (single payment of 90 PLN);
3) the regional scholarship (approximately 50 PLN monthly x 10 months = 500 PLN).

Total expenses: from 1038 PLN to 1710 PLN (yearly).

The financial results of assistance forms accumulation on junior high school level in comparison to the elementary school level (classes 2-6).

The financial results of assistance forms accumulation on the post-intermediate school level: social scholarship, supplements to child allowance (2), EU scholarship, regional scholarship, scholarship for former State Agricultural Enterprises.

Expenses: 1) the social scholarship (minimal amount: 10 months x 44.80 PLN = 448 PLN; maximal amount: 10 months x 112 PLN = 1120 PLN);
2) the supplement to child allowance for the beginning of a school year (single payment of 90 PLN);
3) the supplement to child allowance for undertaking education in a school out of the place of residence (10 months x 40 PLN = 400 PLN or 10 months x 80 PLN = 800 PLN);
4) the EU scholarship (10 months x 250 PLN = 2500 PLN);
5) the regional scholarship (10 months x approximately 50 PLN = 500 PLN);
6) the scholarship for former State Agricultural Enterprises (10 months x 200 PLN = 2000 PLN).

Total expenses: from 5938 PLN to 7010 PLN (yearly).

Public funds channeled for the realization of the programs of educational opportunities equalization constitute an important part of public funds sector transfers. In both macro and micro scales the results of the expenses shall be tangible. The method used for obtaining these public funds shall stimulate the effects of the funds. Unfortunately the introduction of competition method may not only fail to equalize the educational opportunities but also differentiate them territorially.

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