1. School participatory budgeting in every school of the country? Lessons from a national initiative to spread citizenship education

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INTRODUCTION: PAVING THE WAY

In 2017, Portugal became the first country in the world to launch School Participatory Budgeting (School PB) nationally. This chapter analyzes the experience and outlines the main lessons learned after the first five years of implementation. The chapter is organized in three sections. The first provides a literature review of the factors that prompted this policy decision by the Portuguese government. The second describes how this process was designed and implemented. The third section discusses some of its main results so far, comparing data collected from a survey of all public schools in the first round of the program (2017) and data collected by the official platform concerning the fifth round (2021).[1]

In Portugal, as in many other countries, one of the main missions of public schools is to promote democracy and citizenship. A century after Dewey's 1923 publication of *Democracy and Education*, the interest in this topic is being renewed. Not only has youth participation in democracy declined in some regions despite increasing education levels, but so has the 20th-century belief that progress (and education) would generate per se an unstoppable transition to democracy everywhere. This belief has clashed with a new millennium in which such trends have insofar stagnated, and national paths have grown very diverse (Sørensen, 2018).

In political and academic discourses, schools are often seen as key places for the promotion of democracy. However, schools are very complex organizations, subject to many different pressures and ruled by concerns of stability and legitimacy (Meyer & Rowan, 1977). In addition, during the last decades, they have been deeply affected by a neoliberal agenda focused on privatization, performance achievement, and efficiency measures (Hargreaves & Goodson,

2006). A powerful movement on "democratic schools" generated many promising experiences around the world, but many of them did not prevail, and this concept was frequently used in truncated ways (Apple & Beane, 2007; Feito, 2010). While many communities have experienced fragmentation and stigmatization, schools have become more unstable and increasingly pushed to produce individual success *despite* – rather than *with* – local agents (Warren & Mapp, 2011). Mainstream citizenship education policies were carried out in many countries, not without challenges, controversies, and twists (Print, 2007; Sundström & Fernández, 2013). Thus, as noted by van der Ploeg (2016), Dewey's perspective is often interpreted in a minimalist way, as it would be possible to teach democracy only in a single school subject or activity during a few hours per week within a school ruled according to a traditional conservative, authoritative and/or neoliberal model.

Portugal is not an exception to this scenario. The key role of schools in promoting democracy, as well as students' and teachers' right to participate in school management, were included in the new Constitution, written and approved after the 1974 revolution, but such democratic impetus diminished afterward, and accountability pressures increased both over school management and classroom practices (Afonso, 2014). Political speeches announced citizenship education several times, but its implementation was frequently criticized, blocked, delayed, reduced and suspended (Azevedo & Menezes, 2009).

Meanwhile, in the context of increasing criticism and suspicion regarding representative democracy and bureaucratic administration, the concept of Participatory Budgeting (PB) came to be seen as one of the most promising ways to foster democracy and accountability in public institutions, especially in local governance, under the inspiration of Porto Alegre's pioneering experience (Fung & Wright, 2001). Research on this topic has increased during the last two decades throughout the world, with underlying positive impacts but also conditions for success, including political will, a proper institutional framework, the involvement of staff from public institutions, and opportunities for citizens to understand the process and elaborate consistent proposals (Nugra & Mera, 2018). As noted by Boaventura de Sousa Santos (2009), if the PB process generates significant involvement from citizens, many of them formerly suspicious of politics, it may also be a pitfall, raising expectations that quickly lead to anger if the process fails or did not lead to practical improvements. Therefore, some scholars have focused on the technical support for PB implementation (Gomez et al., 2013; Mattei, Santolamazza & Grandis, 2022).

While the process emerged mainly within local administration, some educationalists soon acknowledged the potential of PB for citizens' informal learning on democracy (Schugurensky, 2004), in addition to improving procedures of democratic schools and giving a more practical sense to citizenship education (Delgado, 2014; Aguirre Garcia-Carpintero & Schugurensky, 2017; Gibbs,

Bartlett & Schugurensky, 2021). This was based on previous research showing the importance of legitimate participation in forging community engagement and significant learning (in its most pervasive way, a *habitus*), in contrast to students' passive role (of listeners and players) in mainstream school culture. In this case, the French region of Poitou-Charentes became an essential reference due to a strong political commitment and consistent technical support for the implementation of the PB process in all public high schools to promote young people's skills and values toward democracy (Sintomer, Rocke & Tal, 2013). A case study of a school district in the US that implemented School PB has shown that while the mobilization of students on voting day is easy, their involvement in the elaboration of proposals and discussion is more challenging because many of them consider it "tough" and "boring" (Brown, 2018). Considering this experience, the author emphasizes the importance of students' steering committees and a group of teachers and officials who may inspire and guide the process.

With deep ties with Brazil, Portugal was one of the first countries where PB spread quickly. In many cases, it was a consultive process with a low level of institutionalization and funding (Dias & Allegretti, 2009). The experience of Lisbon municipality was especially significant since it is the capital and the most populated city, and its different editions gave birth to some iconic projects (Falanga, Verheij & Bina, 2021). After several years of austerity policies and a right-wing coalition in charge, at the end of 2015, the Socialist Party formed a new government supported by left-wing parties in Parliament. This administration decided to go a step further, launching both the National Participatory Budget and the School Participatory Budget. The former generated a high level of civil society participation. However, the need for more cooperation between citizens and public institutions raised concerns about the quality or even the possibility of implementing the elected proposals (Falanga, 2020). The latter is the topic of this chapter.

THE SCHOOL PARTICIPATORY BUDGET: A NATIONAL INITIATIVE

After several years of economic cuts and an emphasis on national standards, exams, and grades, 2016 marked a change in education policies. A task force composed of experts, education administrators, and civil society representatives led a series of public debates to elaborate a new vision for schools and discuss students' profiles at the end of compulsory education. Other working groups, composed of scholars, administration officials, teachers, and activists, developed a National Strategy for Citizenship Education and the new Inclusive Education Law.

To achieve the recommendations of these groups, schools were allowed a high level of autonomy and flexibility to work creatively with their communities. All schools were invited to launch local initiatives to support students in expressing their concerns, proposals, and expectations, and some of these students were chosen to present their ideas to the Minister of Education and other high-level officials. This initiative, *The Students' Voice*, was then expanded to international meetings organized by the OECD and UNESCO with students and delegates from different countries.

In the early days of 2017, the Portuguese national government launched the School Participatory Budget (School PB), a democratic process to enable students from K-7 to K-12 (all tracks) to create, develop, discuss, and vote on proposals to improve their schools. All public schools in the country (including vocational ones) were allowed to request an annual supplementary grant (500 euros or 1 euro per student, if more than 500) from the Institute for Education Financing Management (Instituto de Gestão Financeira da Educação, or IGeFE) to implement projects chosen in School PB processes. A massive broadcasting campaign was launched, primarily through social media, to raise young people's awareness and participation. The rationale was to generate a grounded process and mobilize a broader set of students around concrete short-term initiatives while avoiding the tendency of citizenship education activities to be focused on wishful thinking over macro-processes and locally dominated by small groups of privileged agents (students, teachers, experts, and officials) already committed to democratic values. Where to invest this (public) money in the following months was one of the simple questions that touched a more diverse range of students. Considering the different methodologies developed internationally (Gomez et al., 2013; Mattei, Santolamazza & Grandis, 2022) as well as the strengths and weaknesses of previous experiences in Portugal (Falanga, 2020; Falanga, Verheij & Bina, 2021), a national regulation was published, aiming to guide schools to organize the different stages of the process and to assure that students held a leading role in all of them: (a) public dissemination; (b) proposal development; (c) campaign, debate and negotiation; (d) voting; and (e) implementation.

Voting occurred in all schools on March 24th, the students' national day, and only proposals developed by students, previously endorsed by at least 5% of them and approved by the school board, were eligible for the ballot. Principals were recommended to analyze and discuss the proposals beforehand with proponents, support them in presenting consistent, clear, and feasible projects, and promote alliances and merges between groups with similar concerns. Afterward, the specific grant had to be used by the end of the year, and the Inspectorate-General for Education and Science (IGEC) was mandated to audit the process in a random sample of schools.

Although contested by some principals, teachers and students, often with legitimate arguments regarding their specific context, such procedures were meant to provide a degree of quality and viability to proposals, as well as some consistency and credibility to the whole process, given a context of over 1,000 schools and 500,000 students. The government was concerned with avoiding pitfalls observed in previous experiences. Among them was the fragmentation of (poorly developed) proposals focused on particular interests, campaigns based on social capital and emotional ties, officers interested in financing their projects, and authorities blocking the implementation of winning proposals. These situations could undermine the initiative and its contribution to citizens' trust and involvement in democracy.

The coexistence of multiple PB processes, some of which existed locally and others at a national level, contributed to the collective knowledge of this new democratic space and generated a sense of social change. However, it also created challenges, such as partial overlap, confusion, and dispersion among citizens. This was apparent in cases where young people were simultaneously invited to participate in school, municipal and national PB initiatives with different deadlines and procedures. Some local authorities asked the Ministry of Education to allow the merger of School PB activities (and resources) within the municipal initiative. Nonetheless, the national government decided to maintain the independence of the different processes, considering the variations in ownership and methodologies in place.

According to the monitoring survey carried out in two phases (February and May 2017) by the Directorate-General for Educational Establishments (Direção-Geral dos Estabelecimentos Escolares, or DGEstE), in the first edition 1,046 schools implemented School PB (93% of the national public network), 4,371 proposals were developed and endorsed by students, 221,063 students voted (46% of the total), and 1,021 schools democratically elected students' proposals (91%). Interestingly, around one-third of the proposals were improved during the negotiation phase, while around one-fifth were excluded, mainly because they were considered inviable by the school board due to legal frameworks and available resources or because they were already planned with other funding sources. Half of the proposals focused on improving leisure and sociability for students within schools, and 80% of the principals agreed that "School PB contributed to the awareness and civic education of many students." By November, 95% of the available funds had already been allocated to winning projects (for a detailed description of this experience, see Abrantes, Lopes & Baptista, 2018).

Academic research on School PB in Portugal still needs to be more extensive. A study by Moraes, Mouraz and Cosme (2017) from the University of Porto, using website analysis and a survey sent to principals in the northern region of the country, broadly confirmed the official figures: 60% of the prin-

cipals considered School PB an effective contribution for citizenship education through the involvement of students in democratic life. However, 6% stated that students' interest was low. This research added that, in the first edition, most schools did not disseminate information about the process through the school website. However, 55% of schools had already implemented the winning proposals a few months after the polls. Most schools used only the national grant for School PB, while a few complemented it with resources from other sources.

A case study on another school cluster located in the northern region concluded that School PB could be an effective means for promoting students' inclusion, participation, and recognition with the school staff and the school community as a whole, even when the implementation of proposals was not possible in the short term (Cunha, 2018). In this case, interviewed teachers emphasized that a minority of students were highly engaged from the start. At the same time, the interest of the majority only emerged in the following stages of discussion and voting. So, the involvement was growing, and the impacts on students' awareness and maturity were significant. On the other hand, the interviewed students stressed the acquisition of project development skills and the opportunity to discuss their ideas. Still, those leaving the school the following year complained that projects would not be implemented in the short term, so they could not take advantage of them.

AN EXPLORATION OF EMPIRICAL DATA

In school year 2018–19, for the third edition of School PB, the Directorate-General for Education and Science Statistics (DGEEC) created a website to manage and promote this initiative. Four benefits were foreseen: (a) broader dissemination of rules, dates and proposals, leveraging schools' and students' participation; (b) higher efficiency in the way each school receives, manages and approves students' proposals; (c) transparency, enabling citizens (especially students) to have immediate access to approved proposals and voting results; and (d) knowledge, providing more detailed data for administration and researchers.

The following data analysis is based on the information collected through this web platform during the fifth edition of School PB (2020–21) when school closures due to the COVID-19 pandemic likely constrained process development. In 2021, schools were closed from January to March, the usual proposal development and discussion period, and classes were taken online. On the other hand, it is significant that many schools implemented School PB, and students participated despite these adverse conditions. The existence of a digital platform run by a public service was a necessary support to keep

it working. Besides, exploring how such a dramatic situation in our collective life influenced School PB processes is interesting.

According to this database (after the cleaning phase), 2,014 different proposals were uploaded to the platform in 2021 from 696 different schools, with an average of 2.89 proposals per school. Considering the existence of 1,117 public secondary schools in Portugal, the participation rate was 62.3%. This was low compared with the participation rate of 93% in the first edition, but the impact of COVID-19 lockdowns on school life should be considered. Additionally, the first edition benefitted from the novelty effect and a massive media campaign, including visits of government officers to schools to promote the initiative (Abrantes, Lopes and Baptista, 2018).

An interesting finding was that proposals were mostly presented by younger students in grades K-7 (24%), K-8 (24%), and K-9 (25%) rather than by older students in K-10 (8%), K-11 (9%), and K-12 (10%). A possible explanation is that, in Portugal, K-9 is still part of basic education, run by a single curriculum framework that includes a weekly subject of Citizenship and Development, while upper secondary education (K-10 to K-12) is fragmented into several courses and more focused on testing and grading. National guidelines include Citizenship and Development as a transversal goal, but neither a specific time nor a teacher is assigned to this area. Moreover, 7,519 students submitted proposals, and it is relevant that groups of five students presented half of the proposals, the maximum number allowed by the platform for registration (proponents should then get the support of at least 5% of the students in the school). In contrast, only 249 proposals were submitted by a single student, which means that 88% of proposals were signed by a group of peers. Hence, even during the lockdown, there was interaction and collaboration among students to prioritize collective proposals over individual ones.

The average size of the participating schools (410 students) is like the national public schools' average in K-7 to K-12 (414), so the school dimension does not appear to be a key factor for participation. In previous research, we found that the scarcity of proposals could be explained by a lower effort from school staff to disseminate and organize the initiative, by a lower interest from students to develop proposals, or both (Abrantes, Lopes & Baptista, 2018). Still, there is a territorial gap to acknowledge: the proportion of schools where at least one proposal was submitted is higher in the northern and central regions of the country (69%) than in the southern regions of Alentejo (56%), Algarve (57%), and especially the Lisbon Metropolitan Area (48%). The existence of prior PB initiatives run by municipalities may contribute to a lower involvement in this region. The greater improvements in preventing early school leaving and retention rates during the last decade in the northern and central regions (DGEEC, 2021) may also be a factor to consider in this analysis.

In schools where at least one proposal was presented, the average number of proposals per school was 2.89, but distribution among schools was uneven. Around one-third of the schools (36%) had only one proposal, impoverishing the democratic process. The maximum number of proposals in a school was 24, and a few schools (2%) had more than 10 proposals. In most of them (53%), the number of proposals was between 2 and 5. The average number of proposals per school was lower in the central Region (2.4) and higher in Algarve (3.9), reaching intermediate values in the north (3.0), Alentejo (3.2), and Lisbon Metropolitan Area (2.9). It is important to stress that the proposals had to be endorsed by at least 5% of students in advance as a way to promote well-structured proposals that were previously discussed and supported by a critical mass of students. However, the application of such a rule in a time of constraints due to the COVID-19 pandemic may have prevented participation.

The participation rate of schools included in an Educational Territory of Priority Intervention was 50%. This national program covers around 17% of public schools, enabling additional resources to those with low socioeconomic backgrounds and/or low academic scores. This is a matter of concern since, apparently, schools in more vulnerable contexts held lower rates of participation in School PB than the national average. This may be the case, especially in a school year when students were in online learning for around three months and, as such, were more dependent on home conditions. Still, considering the schools where at least one proposal was carried out, schools in this program achieved a higher value (3.4) than the national average (2.9).

Out of the 2,014 proposals, 377 (19%) were dropped by students or were not accepted by the school board after the negotiation and improvement phase, so they were removed from the ballot box. This may occur if proponent students did not collect the support of at least 5% of students or if the school board argued that the project was redundant or not feasible, considering the resources available, the legal framework, and the educational project. Of all secondary school students, 125,557 voted (around 21%). This rate was considerably lower than the one achieved in the first edition (46%), but once again, we shall bear in mind that in 2021 school life (and social life in general) was severely constrained by the COVID-19 pandemic. After the local elections, there were 596 winning proposals from 589 different schools. This means that in 107 schools (15%) where at least one proposal was submitted, there was no winning proposal. This could be the case if the school board did not approve any of the proposals or the elections did not take place. Once again, the pandemic situation may have disturbed this process in some schools. In seven schools, there were two winning projects since the available budget allowed to finance both the first and the second most-voted proposals.

According to the content analysis, followed by a categorial typology (see Table 1.1), students' proposals were diverse, but most of them (37%) focused

on the promotion of students' well-being and social life, in many cases through the creation (or improvement) of common rooms (students' hall), often with appealing furniture, a cafe, a sound system and/or games. Although this trend was already observed in the first edition, in 2021, many proposals were made to extend such students' spaces outside school buildings (within the school area) in order to follow health recommendations to avoid concentrations of people in indoor spaces. Improving the students' radio (or TV system in some cases) was also usual in this category. Equipment for cycling (not usual in Portuguese youth culture) also appeared as an emerging theme.

The improvement of school buildings and outside areas was the main goal of 24% of projects, especially regarding the comfort of classrooms, toilets, and hallways (temperature, light, furniture, etc.) The improvement of sports and physical activities appeared in 11% of the proposals. Many secondary schools in Portugal were built in the 1980s, during the democratization process, and facing a lack of resources to accommodate the fast expansion in student enrollment, sports equipment was often passed over. Therefore, infrastructure is frequently rudimentary and degraded, while students' expectations concerning building conditions increased considerably. The relevance of physical activities reminds us of the importance of this dimension – sometimes conceived as a minor subject in Portuguese secondary schools – for students' well-being and overall development.

A number of projects (10%) aimed to improve educational projects, including arts-specific equipment, scientific labs and observatories, libraries, innovation rooms and extracurricular activities, ICT systems and the natural environment. If technology (especially to enable Wi-Fi access, but also to acquire devices to support learning or administrative activities) was an expected topic, the environmental proposals were especially innovative, integrating projects to reduce water and energy waste, to reuse materials or to create gardens within the school area. The remaining 4% were proposals mixing various pre-defined topics, so these could not be aggregated into a single category.

An interesting finding is that upper-secondary students were overrepresented among proponents of projects focused on students' well-being and social life (36% of the proposals in this category) but underrepresented in the remaining categories except school buildings and outside areas (25%). That is, most proposals regarding sports, educational projects, ICT devices, and natural environment came from basic education students (K-7 to K-9). To reiterate, the weekly classes on Citizenship and Development probably provided a favorable context where many of these proposals were developed, enabling support from teachers as these were framed within curriculum guidelines.

Analyzing the acceptance of proposals by school boards, although differences are not significant, educational (86%) and natural environment (83%) proposals held a higher approval rate, in comparison with projects focused

Table 1.1 *Number and percentage of proposals submitted, excluded, and elected in the 5th edition of School PB in Portugal (2020/21)*

	Proposals		Excluded		Elected	
	N	%	N	%	N	%
Well-being and social life	746	37	145	19	248	33
School buildings and outside areas	476	24	100	21	138	29
Sports and physical activities	223	11	40	18	58	26
Educational projects	209	10	29	14	52	25
ICT devices and services	152	8	30	20	39	26
Nature / Environment	134	7	23	17	32	24
Mixed proposals	74	4	10	14	29	39
Total	2014	100	377	19	296	30

on school buildings (79%) and technological devices (80%). This may be due to the higher cost of such proposals or the school board's belief that such improvements could be supported by other funding sources from central or local administrations. The acceptance rate of proposals aiming to foster students' well-being and social life was 81%. The approval rate did not vary significantly according to educational level. Finally, looking at the winning proposals, the rate was higher among the mixed proposals (39%), as well as those focused on students' well-being and social life (33%), while the percentage of elected proposals on the remaining topics ranged from 24% to 29%. The success of mixing proposals may be explained by the ability to aggregate different interests and concerns within a single proposal.

CONCLUSIONS

The Portuguese government's initiative to introduce PB processes in each public secondary school since 2017 has succeeded in most schools around the country, and it even continued during the years affected by COVID-19 lockdowns. This has resulted in thousands of different student proposals to improve their own school being produced, discussed, and voted on by the student body. Criticism was scarce in the public debates and, although more research is needed, quantitative and qualitative data appear to stress the positive impacts on young people's values and competencies toward democracy.

The tools to implement and support this initiative were varied. Among them were an initial media campaign to raise awareness among students (and pressure schools), a supplementary fund allocated annually to schools only

for School PB use, and a clear national policy to ensure the democratic logic and the educational value of the process. These remained unchanged over five years (and are still ongoing) and are generic enough to allow each school to own the process. In addition, since the third edition of School PB, a national (user-friendly) online platform has been adopted to facilitate participation, transparency, and research. These tools emerge as successful practices that can be followed by other places interested in using School PB to foster democracy. Still, some other aspects should be noted, both to support further research and public policies in this area.

Firstly, the number of absent schools was considerable, especially in the Lisbon region, and this could be considered surprising since the School PB initiative provides them with a complementary source of funding. However, informal interaction with students, teachers, and officials raised some factors that may be used as hypotheses in future inquiries:

- the low level of funding makes the initiative unattractive, especially in big cities, where the economic resources and costs are higher (financial irrelevance);
- the existence of other school and local initiatives makes School PB redundant or an alternative to avoid (for instance, some schools asked the national government permission to merge School PB with local initiatives, and others requested a schedule adaptation);
- the promotion of School PB by the national government in charge generated some resistance from those not supporting this government (political appropriation).

Secondly, the lower participation among students in upper secondary needs to be investigated and reversed. A possible explanation is that the educational environment influences students' involvement in School PB. A more flexible and inclusive curriculum organization, including set times and teachers devoted to citizenship education, may promote students' participation, while a more competitive and standards-based curriculum, stressing individual preparation to succeed in exams or to employability, may diminish students' involvement. The recent introduction of a *Citizenship and Development* subject in the national curriculum of basic education (especially in K-5 to K-9), including a particular domain named *Democratic Institutions and Participation*, appeared as a privileged space where students reflect upon School PB principles and procedures, forging some of the proposals and supports. Still, further research is needed to understand if and how these curricular spaces (or other subjects like Math or Geography) are being articulated with School PB practices.

Thirdly, more research is required on the skills, values, and dispositions developed through participation in School PB experiences. The existing national platform is not the right tool for this, and some previous exploratory research on principals' and teachers' perceptions is useful but is not enough. Participation rates being quite impressive in Portugal, one may wonder if part of such participation is too superficial to generate new knowledge, beliefs, and practices or if other parts may be oriented toward the private interests of specific agents and groups through entrepreneurship, social capital, etc., despite a more collective notion of democracy. These hypotheses – related to different concepts of democracy in contemporary societies – could be confirmed or rejected in future research.

Fourthly, information on the implementation of School PB projects – a key stage of this process – is still scarce. An improvement of the national database, as well as case studies based on field research, would be useful to understand how these projects are being implemented after the voting phase, how students are involved in this stage, and which impacts are apparent on students' values and conceptions toward democracy. If School PB has the potential to generate knowledge and belief in democratic institutions, the lack of implementation (or some distortion of the projects regardless of students' will) may also lead to frustration and distrust in democracy.

Finally, School PB is a supplementary (and mostly symbolic) process that does not interact – at least formally – with the remaining financial management of schools and with local or national policies. In a recent OECD review (Liebowitz et al., 2018), some remarks on the lack of transparency, rationality, and participation were pointed out in relation to the funding scheme of Portuguese schools. Furthermore, the current process of transference of competencies from national to local authorities has so far raised more controversy than clarification on this process. Although formally endorsed by the "democratic management of schools," teachers, students, and families are still not involved in key decisions of their school administration, such as budget orientations, on a regular basis. Therefore, School PB may also be seen as a consolation prize, democratic access to the crumbs, leaving the cake out of scrutiny. I hope this chapter – and the whole book – makes a substantial contribution to our collective knowledge of how to involve students in democratic decisions in their schools and in their communities, avoiding some of the pitfalls that sometimes emerge in the process. Not only because this may lead to better decisions and because they have a right to it but also because it is crucial to reinvigorate our democracies.

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