

Parental participation fees in school expenses in Israel

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Abstract

Purpose: Many countries throughout the world provide all children with free education. However, sometimes there are user charges in publically-funded schools worldwide. This study aims to explore parental participation fees in school expenses in Israel, depicting the current situation and analyzing its implications.

Research Method: Public documents from Israel were explored, such as guidelines of the CEO of the Ministry of education, laws, court rulings, publications of the Central Bureau of Statistics, reports of State Comptroller and reports of various committees. Document analysis was a three-stage process – condensing, coding and categorizing. The analysis was based on interpretation of the documents collected, attempting to detect explicit and implicit meanings concerning the topic at hand.

Finding: Findings show that the Israeli policy in regard to parental payments has three main characteristics: (1) high basic payments; (2) payments for learning activities; and (3) insufficient enforcement.

Practical Implications: According to the findings of this study, it would be advisable to re-examine the Israeli policy in regard to school charges that parents are required to pay.

Originality/value: There is not much research to be found on the subject of parental participation fees in school expenses. The findings of this study expand the limited knowledge existing on this topic.

Keywords: free education, parental fees, inequality.

Type of paper: Research paper.

Introduction

The entitlement to education has been officially recognized as a human right since the adoption of the Universal Declaration of Human Rights by the United Nations General Assembly in 1948 (Donnelly, 2013). This right is probably the main reason for the establishment of a free-education-for-all-children policy by many countries, providing schools that are financed by taxation. Additional reasons for this policy may be the potential impact of education on implementation of national values, its contribution to social cohesion, and its positive effect on citizens' earning capacity, influencing in turn the national economic situation.

Israel is no exception in this regard. The Israeli Compulsory Education Law, which was passed soon after the establishment of the State of Israel, includes the guarantee of free education. According to this law, the State of Israel is committed to providing free basic education, from kindergarten to twelfth grade (The State of Israel, 1949).

In practice, however, publically funded schools worldwide are sometimes not entirely free. The World Bank notes that there are formal and informal user charges in these schools. Formal user charges are payments by recipients for identifiable elements of education services, such as charges for textbooks or laboratory materials. Informal user charges are payments that are a declared policy, such as pushing the costs of heating school buildings onto parents (Vandycke, 2001).

There is very limited research about school charges paid by parents worldwide. This study focuses on the situation in Israel in this respect. Israeli law allows local education authorities to collect payments and reimbursements from parents, subject to the approval of the Minister of Education (The State of Israel, 1949). The goal of this

study is to explore the actual Israeli policy on this issue, describing the current situation, and analyzing its implications.

Theoretical Background

Public Funding for Schools

The United States is a world leader in education investment. It usually spends a great deal of money on kindergarten to 12th grade (K-12) education, and the sums dedicated for this purpose have grown considerably over the past decades, consuming an increasing portion of its economic activity. According to the United States Constitution, the responsibility for K-12 education rests with the states. For this reason, states and districts are the primary sources of education funding. However, there is also a national interest in the quality of the nation's public schools. Thus, the federal government, through the legislative process, provides assistance to the states and schools in order to supplement state support for education (U.S. Department of Education, 2005).

For most of the twentieth century, school finance policy has focused on equity, seeking to provide all children with a basic and equal education. In the 1990s, attention began to focus on education adequacy and productivity – i.e., on the linkage between the amount of funds, their use, and levels of student achievement (Odden & Picus, 2007). Thus, various researchers (e.g., Carter, 2012; Comber & Nixon, 2011; Jennings, 2010) refer to the present era as "the era of accountability", defining accountability in education as "demonstrating the worth and use of public resources" (Lewis, Ikeda & Dunder, 2001, p. 74). For this purpose, quite a few reforms have been made in recent years in the way states distribute their funding to local school districts (e.g., Canfield, 2013; Hirth & Eiler, 2012; Wong, 2013).

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In general, Americans support education funding and are concerned about schools' lack of funds (Bushaw & Lopez, 2010). In New York, for example, despite annual local property tax increases, 91.9% of proposed school district budgets were approved by voters between 2003 and 2010 (Silverman, 2011). However, education has never been neither a highly prestigious nor a highly paid profession in the United States (Owings & Kaplan, 2012).

Extracurricular Activities

Some argue that although schools do deserve public funding, extracurricular activities offered to students in addition to their regular academic curriculum are not an integral part of the school program. They fall outside the bounds of a free education since they are voluntary, and therefore fees may be charged for participating in them. Moreover, in today's reality, with public school budgets pinched and educational demands rising, in the absence of fees these activities will have to be canceled (e.g., Hoff & Mitchel, 2006; Reeves, 2006).

Farkas and Duffett (2012) interviewed a representative sample of adults concerning various cost-cutting measures that district leaders are considering due to the current harsh economic situation. They found that in regard to charging fees for extracurricular activities, the public is split about this budgetary trade-off: only 23% say charging fees for activities is a good way to save money, as it allows the schools to focus resources on academic subjects, while another 32% say it is a good way to save money only if low-income students are helped to pay such fees; another 39% believe it is a bad way to save money, since students gain a lot from these activities and may avoid participating in them if they entail extra payment. Thus, a slender majority emerges in support of fees for extracurricular activities, but only if financial help is provided to low-income youngsters.

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In practice, there are different approaches to this issue. In California, for example, it has changed over the years. In 1984 the Santa Barbara Board of Education decided to charge students participating in certain extracurricular activities, but the proposed fee – \$25 for each activity – was eventually struck down by the California Supreme Court as a violation of the free school guarantee of the California constitution. Today, however, many schools in California regularly impose fees for public school activities that are considered to be extracurricular. In some districts, such fees are reportedly higher than \$500 per activity (Taylor, 2009). In Wisconsin, districts have raised dozens of school fees for various student activities, increasingly depending on funding from parents (Dyrli, 2008). In Massachusetts, on the other hand, fiscal challenges at the state level, coupled by rising fixed costs, led many districts to increase local funding, but to a much lesser degree to impose user fees for transportation and extracurricular activities (Massachusetts Department of Education, 2008).

Similarly, in recent years many items have been added to the required school supply lists sent to children's homes every year. Thus, national back-to-school consumers' spending has increased significantly, reaching \$18.4 billion in 2007, up from \$17.6 billion in 2006 and \$13.4 billion in 2005. To provide relief for consumers coping with increasing back-to-school expenses, fourteen state governments have suspended the sales tax on school supplies in July or August, including New York, Michigan and Tennessee. However, some districts have been able to resist the trend by shortening their lists, if and when their budgets allowed this. These districts have shortened their supply lists and now pay for equipment that the districts once asked parents to provide (Dyrli, 2008).

Sources of School Budget

What percentage of schools' budgets comes from public funding? School principals are asked to answer this question within the framework of the Program for International Student Assessment (PISA), an international comparative study on literacy among 15-year-old students. The principals are asked what percentage of their school's total funding for a typical school year comes from the following sources: government (including departments, local, regional, state and national); student fees or school charges paid by parents; benefactors, donations, bequests and sponsorships; and other sources. The data presented herewith is based on the school principals' answers in PISA 2009 (Organisation for Economic Co-operation and Development, 2012).

On average, across the OECD (Organisation for Economic Co-operation and Development) countries, 85% of total school funding comes from government sources; 10% from parents; 2% from benefactors; and 2% from other sources. Over 30% of school funding comes from parents in Colombia (32%), Peru (39%), Mexico (46%), Korea (48%), and Dubai (82%), while in Azerbaijan, Estonia, Finland, Iceland, Lithuania, Norway and Sweden, the average student attends a school where over 98% of school funding comes from government sources.

The levels of public funding for privately managed schools differ significantly across countries. In Albania, Dubai, Greece, Jordan, Kyrgyzstan, Mexico, Qatar, Tunisia, the United Kingdom, the United States and Uruguay, one percent or less of funding for privately managed schools comes from the government; in Brazil, Kazakhstan, New Zealand, Panama, and Peru, the rate is 1-10%. In contrast, principals in privately managed schools in Finland, Hong Kong, the Netherlands, the Slovak Republic and Sweden reported that over 90% of school funding comes from the

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government, while in Belgium, Germany, Hungary, Ireland, Luxembourg and Slovenia, 80-90% of funding for privately managed schools comes from that source.

Countries that provide more public funding to privately managed schools tend to require less funding from parents. In Finland, Germany, Hong Kong, Hungary, the Netherlands, the Slovak Republic, Slovenia and Sweden, principals in privately managed schools reported that 10% or less of school funding comes from student fees or school charges paid by parents, while in Dubai, Greece, Mexico, Panama, Peru, Qatar, Tunisia, the United Kingdom and Uruguay, 90% or more comes from that source.

In Israel 75% of total school funding comes from the government. This rate is lower than the average across the OECD countries, which is, as mentioned before, above 85%; Israel is ranked 26th of 33 in this context. The percentage of public funding for Israeli privately managed schools (which serve about 18% of Israeli students) is 66%, while the percentage of public funding for publicly managed schools (which serve about 82% of Israeli students) is 78%.

Research Context

This research explores the conduct of the State of Israel in terms of its policy concerning parents' participation in schooling costs. According to the Gini coefficient for measuring a nation's distributive inequality, Israel is among the five countries with the broadest gap between rich and poor, alongside the United States, Turkey, Mexico and Chile (Organisation for Economic Co-operation and Development, 2014). Mindful of the great diversity among school populations, recent educational policy in Israel has been directed toward achieving high levels of equality in educational outcomes across the board. Nevertheless, Israeli students' academic achievements remain among the

lowest in the industrialized countries, and students' educational gaps (achievement distributions) remain among the largest (BenDavid-Hadar and Ziderman, 2011).

Methodology

The current study explores the Israeli school system. This system consists of public schools and private schools. Public schools serve about 1.33 million students, with approximately 67 percent in the Jewish sector and 33 percent in the Arab sector. The Jewish sector is divided into state schools (75%) and state-religious schools (25%). The Arab sector is divided into Arab schools (71%), Bedouin schools (22%) and Druze schools (7%). Most of private schools are ultra-orthodox religious schools, which serve about 270,000 students (Israeli Central Bureau of Statistics, 2013a).

This study is qualitative in nature, using document analysis. Alongside interviews and observations, documents are also a valuable source of qualitative data, being that "documents are part of the fabric of our world" (Love, 2003, p. 83). Documents may be useful in various areas of educational research. For example, Jenkins (2009) used documents from various countries to investigate conceptual foundations of science curriculum reform in schools; Gregg (2011) explored what the position statement of the National Association for the Education of Young Children articulates regarding children with disabilities included in early childhood classrooms; and Tupper (2008) examined a high school drug education text to discern its underlying ideological commitments and political dispositions.

Documents are often used as secondary sources in qualitative research, since they are considered to be "valuable resources for confirming insights gained through interviews and observations" (Merriam, 2009, p. xi). One may claim that this is regrettable, since documents have many advantages as a source of data (Bowen, 2009),

making things visible and traceable (Prior, 2003). At any rate, some areas can be investigated primarily through documents, and such is the case with the subject of this study, which deals with the conduct of a state in regard to school charges paid by parents. Thus, this study is based on document analysis.

Bogdan and Biklen (2007) classify existing documents on educational research into three basic categories: personal documents – documents created by an individual; official documents – documents produced by institutions; and popular culture documents – mass-consumed materials, such as movies, music albums, books and advertisements. This study required focusing on official documents, which are public documents, i.e. documents produced for the public (Payne & Payne, 2004). Thus, public documents from Israel were explored, such as guidelines of the CEO of the Ministry of education, laws, court rulings, publications of the Central Bureau of Statistics, reports of State Comptroller and reports of various committees.

Data analysis was a three-stage process – condensing, coding and categorizing. Once documents were collected, I found that not all the material collected could serve the purpose of the study, and a sorting process was necessary (Miles, Huberman, & Saldaña, 2014). Thus, in the first stage of analysis (condensing), I looked for the portions of data that in any way related to the topic of this study. In the second stage (coding), each segment of relevant data was coded by the aspect of the subject it expressed (Gibbs, 2007). After capturing the essence of portions of data in the second stage, in the third stage (categorizing), I clustered similar portions of data to generalize their meanings and derive categories, reworking categories to reconcile disconfirming data with the emerging analysis.

Document analysis seeks to clarify not only what the author meant, but also to ponder the meaning of the document's actual existence. Documents should be analyzed

not only through dealing with their contents, as produced by human beings, but also through dealing with their function within relational networks (Prior, 2008). Document analysis in this study was based on interpretation of the documents collected, attempting to detect explicit and implicit meanings concerning the topic at hand.

Findings

Analysis of relevant documents shows that the Israeli policy in regard to parental payments in Israel has three main characteristics: (1) high basic payments; (2) payments for learning activities; and (3) insufficient enforcement. These characteristics will be explored presently.

High Basic Payments

The Israeli basic parental payments cover costs that are not part of the learning itself. These payments are divided into compulsory and optional payments. The only payment which is compulsory is personal accident insurance, which is insurance against the risk of a student's injury. This insurance costs \$15 per student per year (Israeli Ministry of Education, 2014c). (It should be noted that the currency of the State of Israel is The Israeli New Shekel. In this article, prices were converted to dollars so as to facilitate understanding of the findings, enabling comparison to other places in the world. All the costs quoted in this article are for the 2014-2015 school year.)

All other payments are optional. These include a payment of \$30 for cultural activities such as theater performances, concerts, museum visits, meetings with writers and intellectuals, lectures, etc., at school or elsewhere; a payment of \$7 for three parties a year; and a payment ranging between \$28 and \$110, depending on age group, for various trips,. In the last year at school there is an additional payment of \$20 for a graduation party. These prices are for elementary school; in high school the prices are

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higher: \$50 for cultural activities; \$150-\$175 for trips; and \$55 for the graduation party. The total sum of school charges ranges from \$80 in the first grade to \$305 in the twelfth grade (Israeli Ministry of Education, 2014c).

These sums of optional payments are maximum sums; a school may also charge less. Since these payments are optional, it is forbidden for the school management to charge a parent for a certain service if he or she is not interested in it, or to condition the provision of a certain service on payment for another service. In addition to the services described above, there are other services offered by schools, usually aimed at saving money by centralized certain purchases, or for the convenience of parents. These voluntary services may include enrichment classes, eurhythmics, software, a class photo, a class newsletter, a school newspaper and the like. For such voluntary services the school may charge another \$70, and in high school – \$130 (Israeli Ministry of Education, 2014c).

The Israeli Ministry of Education aims to ease the financial burden of purchasing textbooks, and therefore prohibits writing in them (Israeli Ministry of Education, 2010). According to a new law, schools have to run a textbook lending library. This law is currently under implementation. Each school receives funds for the establishment of the lending library. Thereafter it may charge \$80 per student per year for providing textbooks and workbooks in elementary school, and \$90 for the same in high schools (Israeli Ministry of Education, 2014a). According to the Israeli Compulsory Education Law, the local authority has to provide notebooks, stationery and the rest of the necessary equipment for studies (The State of Israel, 1949). However, this is currently not realized, and students must buy these items for themselves.

Any charge beyond the above-mentioned is not allowed. The school may charge the cost of swimming lessons, but other payments are prohibited, including payments

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for craft materials, study materials, photocopying, administration, maintenance, library services, first aid, psychological and educational consultations, issuance of diplomas, and security services (Israeli Ministry of Education, 2002b).

In total, the basic school charges in Israel per student per year, plus the additional payment for voluntary services, range from \$231 in the first grade to \$521 in the twelfth grade (see table no. 1). In order to be able to evaluate these payments properly, it should be noted that the average income per household in Israel is about 60% of the average income per household in the United States. In 2011, for example, the average gross income of Israeli households was \$42,325 per annum (Israeli Central Bureau of Statistics, 2013b) while the average income of US households was \$69,677 per annum (DeNavas-Walt *et al.*, 2012).

== Table no. 1 about here ==

Payments for Learning Activities

In addition to the basic payments, parental participation in school costs in Israel include several payments for learning activities. The Israeli State Education Regulations allow schools to run additional study programs. Such a program may stem from parents' requirement, and needs the approval of the school's superintendent. The parents who are interested in the program must bear its cost (The State of Israel, 1953). In practice, the Israeli Ministry of Education enables running of such additional programs consisting of up to five hours weekly. The maximum payment for each weekly hour per student per year is \$56 in kindergartens, \$50 in elementary schools, \$60 in middle schools, and \$65 in high schools (Israeli Ministry of Education, 2014c).

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This mechanism was used to regulate parents' payment in the religious state sector as well. School charges in this sector are very high, due to the will to expand religious studies and activities. The high payments required led to indignation and complaints, which were discussed at two public committees (Buchris, 2012; Finkelstain, 2014). In order to regulate the payments in the religious state sector, the Israeli Ministry of Education allowed religious state schools to run 'additional religious study programs' consisting of up to 5 hours weekly in the first to fourth grades, and up to 10 hours weekly in the fifth grade and up, in addition to the regular 'additional study program' consisting of up to 5 hours weekly. The cost of the 'additional religious study program' can reach up to \$500 in elementary schools, \$600 in middle schools, and \$650 in high schools. Moreover, religious state schools that run 'additional religious study programs' are allowed to charge \$115 to \$170 for running school during the afternoon, and \$435 for educational activities. The total sum of additional payments in the religious state sector ranges from \$570 in the first grade to \$1580 in the twelfth grade (Israeli Ministry of Education, 2014b). Table no. 2 presents the additional payments permitted at religious state schools.

== Table no. 2 about here ==

Similar payments are allowed in schools that are in the categories of experimental or unique schools. These schools are also allowed to run 'additional study programs' consisting of up to 5 hours weekly in the first to fourth grades, and up to 10 hours weekly in the fifth grade and up, which cost up to \$650 per year, in addition to the regular 'additional study program' consisting of up to 5 hours weekly. They are also allowed to charge \$115 to \$170 for running school during the afternoon (Israeli

Ministry of Education, 2014c). These payments are currently being discussed in the Israeli High Court of Justice (Israeli High Court of Justice, 2014).

One more payment for a learning activity is the payment for elective subjects learned on an expanded scope in high schools. The Israeli high school curriculum includes mandatory subjects and elective subjects. A student who learns more than two elective subjects on an expanded scope may be charged up to \$215 for extra hours of every additional subject, and up to \$430 for two additional subjects. This payment is applicable in the case of subjects that require extra financial costs, such as arts or geography (Israeli Ministry of Education, 2014c).

Private schools in Israel are funded only partially (Israeli Ministry of Education, 2003). Thus, they are allowed to charge parents according to the gap between the budget that they receive and the budget that public schools receive, plus 15% for overhead expenses (Israeli Ministry of Education, 2014c).

Insufficient Enforcement

In order to make sure that schools comply with the payment guidelines which guarantee that parents are not overcharged, the Israeli Ministry of Education requires each school to obtain its superintendent's approval of the payments letter, through a computerized system. Without this approval the school is not allowed to collect payments (Israeli Ministry of Education, 2014c).

In reality, though, not all of Israel's school principals report their schools' payment requirements from parents through the computerized system. In the school year 2010-2011, only 2,359 out of 4,164 schools (57%) reported all the data on their payment requirements, and only 2,043 schools (49%) received an approval for their payment requirements. In addition, some school principal reported only part of the payment

requirements through the computerized system, and some superintendents approved payments that were higher than the permitted amounts (Israeli State Comptroller, 2012).

The Israeli Ministry of Education has threatened to take a range of measures against schools and principals that charge parents too much, such as holding a disciplinary hearing with the school principal; a review of the financial statements of parents' payments from the last seven years by an external auditor; and a comprehensive examination of the educational institution's compliance with the terms of its license (Israeli Ministry of Education, 2002a). Additional measures include reduction or cessation of the school's funding; filing a claim for repayment against the ownership of the institution; and cancellation of the school principal's transaction approval (Israeli Ministry of Education, 2014c).

However, as of now all these threats remain unrealized. In the school year 2010-2011 most of the districts did not even conduct inquiries about schools not fulfilling the provisions of the Ministry regarding parental payments, and certainly did not take any punitive action (Israeli State Comptroller, 2012).

Discussion

This study's findings show that the Israeli policy in regard to school charges has several significant flaws. First, although Israel holds a free-education policy almost since its establishment (The State of Israel, 1949), education in Israel is not really free: the basic payments for a single student amount to hundreds of dollars a year (see table no. 1 above). It should be noted that the average number of children up to age 17 per household in Israel (for households in which there are children of this age group) is 2.4 (Israeli Central Bureau of Statistics, 2013a). Thus, most households pay for more than

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one student. These data are compatible with the reports of school principals from various countries, mentioned in the theoretical background brought above, showing that the rate of government school funding in Israel is lower than the average across the OECD countries, with Israel ranking 26th of 33 in this context.

Moreover, school charges in Israel are not only for extracurricular activities. Extracurricular activities are offered to students in addition to their regular academic studies and are considered by some to be outside the bounds of a free education, justifying extra fees for participating in them. As I have noted in the theoretical background, different countries have different approaches to this issue (e.g., Dyrli, 2008; Taylor, 2009). In Israel, however, there are significant payment requirements for learning activities, which are supposed to be given for free in public education. In fact, payments for learning activities in public education in Israel may exceed \$1500 per year (see table no. 2 above).

Ostensibly the solution is simple: Israel should eliminate parental payments completely, providing education for free. However, Israel's annual expenditure per student is relatively low. In 2010 Israel's expenditure per student for all services (from primary to tertiary education, including research and development activities) was \$6,500, which is almost one-third less than the OECD average of \$9,313. This represents the eighth lowest expenditure per student of OECD countries (Organisation for Economic Co-operation and Development, 2012). Eliminating parental payments without providing an alternative budget would reduce the Israeli national expenditure on education even further, resulting in a possible adverse effect on students' academic achievements, which as mentioned above are already among the lowest in the industrialized countries (BenDavid-Hadar and Zideman, 2011).

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In addition, Israeli policy in regard to school charges involves substantial risk of inequality, because the high payments for learning activities depend on parents' will: parents have to pay only if they want additional study programs for their children. Thus, it is assumed that in schools where parents belong to a high socio-economic status, and thus can afford the cost of additional weekly learning hours, the students will learn much more than in schools where parents belong to a low socio-economic status. And indeed, a considerable gap between parental payments of different quintiles of Israeli society has been found. In 2003, average payments for elementary school, per student per year, were \$236 in the lowest quintile; \$305 in the second quintile; \$392 in the third and in the fourth quintile; and \$573 in the fifth quintile (Israeli Central Bureau of Statistics, 2007). Educational inequality requires attention especially in Israel, where students' educational gaps (achievement distributions) are among the widest in the industrialized countries (BenDavid-Hadar and Ziderman, 2011).

The inequality in Israeli school charges has one more aspect: religious schools are allowed to run additional study programs and thus to charge parents more than secular schools. The gap between religious and secular schools is significant both in scope of weekly hours and in sums of parental payments. For this reason, these payments are being discussed these days in the Israeli High Court of Justice (Israeli High Court of Justice, 2014).

The above-mentioned problems of the Israeli policy in regard to school charges are intensified by the fact that the Israeli Ministry of Education does not enforce its formal policy adequately, so that many schools charge substantially higher sums than permitted. This situation exacerbates the problems mentioned above – the problem of "free" education, which actually costs a lot of money while also giving rise to inequality that increases educational gaps among students.

To conclude, the Israeli policy in regard to school charges should be re-examined. Measures such as reducing the amount of payments required, termination of collection for learning activities and ensuring equality, could lead to the strengthening of truly free education, raising achievement and narrowing gaps.

Studies about school charges worldwide are extremely scarce. The current study is the first research paper written on the conduct of the Israeli ministry of education in this respect. It is important to continue monitoring what is being done in this area since it changes from time to time. In addition, it would be advisable to explore this topic elsewhere in the world, comparing it on the backdrop of various socioeconomic and cultural contexts.

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