FAIR FINANCING: Policy Compendium Brief
Prepared by Kelsey Dalrymple
December 2016

INTRODUCTION
The Education Equity Research Initiative is a collaborative partnership formed by research and
program-implementing organizations with the common objective of advancing research to inform
policy and programming on the effective ways of strengthening equity in and through education
systems. As part of this initiative, the recent Fair Financing: Education Finance Policy for Equity Literature
Review was commissioned. The goal of this review was to examine the literature around education
finance in an attempt to describe the current state of play in regards to both national and
international actors and their efforts to align resources with the needs of disadvantaged populations.

To inform the literature review, a policy compendium spreadsheet was developed. This was done
with the aim of collecting and organizing information on specific education finance policies in a
simple, user-friendly format in order to better understand what education finance policies exist with
intended outcomes of equity, who they are targeting, and what their impacts have been to date.

METHODOLOGY
The policy compendium spreadsheet was designed for easy use by practitioners in the fields of policy,
research and education. To develop the spreadsheet, approximately 200 documents were identified
and reviewed, including: program reports, policy papers, government expenditure reviews, academic
research studies, and periodical pieces. These sources were scanned for short descriptions and
outcomes of finance policies addressing equity in education. Relevant information was then entered
into the spreadsheet according to: location, policy type, target population, and outcomes. Detailed
information on how each policy approach was implemented was also entered, as well as information
on the source of information.

IMPROVEMENT AND FURTHER USE
This policy compendium is a first attempt to collect and categorize information on past and present
education finance policy approaches in a user-friendly database. As the policy compendium
spreadsheet was developed over a one-month period, it is acknowledged that numerous policy
approaches have not been captured in the current spreadsheet and can continue to be collected and
added to the spreadsheet over time. It is also acknowledged that the current spreadsheet does not
include the timeframe that each policy approach was implemented for and it is recommended that
this information be populated in the spreadsheet to create a more comprehensive database. Lastly, it
is recommended that information regarding whether each policy approach is a national,
international or collaborative approach be added to the spreadsheet in order to provide
opportunities for further analysis on this subject.

It is hoped that this policy compendium will help to inform the Education Equity Research Initiative’s
future research and serve as the start of an evidence base on education finance policy for equity in
order to help align resources with the needs of disadvantaged populations.