

## When rationality meets political interest. Problems of education policy rationalization in Polish municipalities<sup>1</sup>

**Abstract:** The paper presents the results of the research on education policy rationalization in rural and urban-rural municipalities. The author focuses on the most radical rationalization solution, namely the liquidation of schools. This solution, albeit economically feasible, can be costly in the social dimension. In the article, the author verifies the hypothesis assuming that the postulated rationalization of the municipal education policy becomes fictitious when the municipal authorities (executive body) are motivated by their own interest, i.e. maintaining public support (a victory in subsequent elections) rather than economic rationality and public good.

The problem of rationalizing school networks in the municipalities has been analyzed by the author on the grounds of the rational choice theory. The article was based on the literature review, quantitative data and empirical research carried out in selected municipalities in the form of semi-structured interviews. The comparative method, elements of system analysis and qualitative methods were used in the research. In a two-stage process, the researcher has chosen the municipalities located in three provinces (Świętokrzyskie, Mazowieckie and Pomorskie), and then 60 respondents from among the following groups: municipal authorities (an executive body and representatives of a legislative body), teachers, school governing non-state entities, representatives of local communities and local leaders.

**Key words:** education policy, rationalization of education policy, rational choice theory, public policy, school liquidation

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### Introduction

**E**ducation policy rationalization has in recent years become the subject of both public and political debate, as well as an instrument for gaining and/or maintaining power. The term “education policy rationalization” is most commonly understood as nothing but a closure of the schools that place a significant financial burden on municipal budgets. On the one hand, such understanding of the term is emphasized by the media, influencing local communities and teachers (Starczewska, 2009), and on the other hand, by the local authorities, which are aware of the limited scope of action in this area (Kołaczkowski, 2012).

In the face of increasing spending on educational activities and transferring further responsibilities in the scope of education to local governments, accompanied by a constant drop in the number of students, rationalization measures in the education system seem to be essential. Local governments throughout Poland have been struggling for

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<sup>1</sup> The article was based on the research conducted within the framework of the project “Political interest and rationality in the public policy implementation. Political and social consequences of the schools network optimization”, no. 2015/19/D/HS5/03153, funded by the National Science Center – Poland, SONATA 10 Program.

years with the problem of rising educational expenditures, which, as a matter of fact, they cannot fully control. The necessity of adopting rationalization measures in the most drastic form, i.e. school closures, particularly affects rural and urban-rural municipalities. While it seems reasonable to limit the public spending when the majority of the budget of a territorial unit is allocated to one of the municipal public policies only, the liquidation of educational institutions is never a simple task for the municipality.

When adopting rationalization measures, the municipal authorities are bound not only by applicable laws and municipal budget framework, but also some other important determinants of local education policy such as a local community, its attitude towards the authorities and the mutual relations between the inhabitants of the municipality, the presence of local leaders and opinion makers, a specific nature of a teaching community, which in rural communities is an opinion-forming group, as well as a non-educational role of the school in the local environment, including the history of school buildings and plans for their management after school closure.

The measures aimed at rationalizing educational expenditures are primarily the consequence of a cold calculation of decision-making units and weighing up particular interests. In the case of education policy rationalization, the interests and objectives of the three stakeholder groups, i.e. the municipal authorities, the teachers and the parents of the pupils, are in conflict. Their activity and involvement determine the course of the rationalization processes and their financial, social and political implications.

The theoretical basis for the analysis carried out in the article has been set down by the assumptions of rational choice theory. The research was conducted in accordance with the comparative method and the elements of system analysis. The article also presents the results of qualitative research carried out in the form of semi-structured interviews.

### **Rationality in public decision-making – theoretical framework**

In recent years education policy issues have been narrowed down to high costs generated by education in municipalities. However, in practice it was not always high cost that was the immediate reason for closing down schools with a small number of pupils. The issues of children's education standards, the conditions of pupils' development (including the question of socialization in a peer group), the role of the school in the local environment, the specificity of the local community and the relationship between local stakeholders have been virtually overlooked in the course of the public debate. Thus rationality was narrowed down to economic dimension.

Rationality, according to R. Szarfenberg, is the best choice of courses of action made by a decision maker on the basis of weighing their negative and positive effects (Szarfenberg, 2002, p. 4). Such a choice, according to the researcher, entails several conditions. Firstly, in order to be able to make rational decisions, it is necessary to have knowledge about the subject matter of the decision-making process, as well as the effects of each of the considered options. Secondly, it is important to assess the impact of decisions made by the decision maker. On this basis, he or she can make the right choice. Creating decision options is possible on the assumption that these solutions are feasible. According to R. Szarfenberg, the issue of assessing the impact of different decision-making options

may be problematic. Impact assessment depends on a number of factors including values, their hierarchy or differences in interpretation (Szarfenberg, 2002, p. 4).

T. Kotarbiński can be cited here as the author of a division into material and methodological rationality. The former refers to a situation in which people have full (objective) knowledge about a particular situation and adapt their actions accordingly. However, as Kotarbiński stated, such a situation does not always take place, and then the decision-maker's reaction is based on subjective knowledge, i.e. on the basis of the available information, which is likely to be true (Kotarbiński, 1975, pp. 123–124; Szarfenberg, 2002, p. 5).

H. Simon, the author of the concept of limited rationality, pointed out that practically all people are rational. They usually have specific reasons for doing things, which may not always seem rational to others, but it does not necessarily mean they are irrational whatsoever. In the first place, while assessing rationality or irrationality of one's actions, the following should be taken into account: firstly, that the actual reasons for their actions are not always the reasons that people usually give; secondly, the reasons may be based on incorrect assumptions; thirdly, there may be other, much stronger, unstated reasons for not taking different actions (which may seem reasonable and legitimate from other people's perspective); fourthly, they may hold different set of values (Simon, 1995, p. 46–47).

In turn, G. C. Homans in his rationality proposition pointed out that an individual (a decision maker) chooses between different courses of action, and while choosing one of the options he estimates the value that is available to him at any given time. Based on his beliefs, he chooses the best one, taking into account the probability of the expected outcome. So he evaluates not only a specific solution, but also the possibility of its occurrence (Homans, 1974). G. Homans, in his assumption of rationality, pointed out that in reality people are guided by two key factors, not just one, as suggested by other scholars of rationality. One of the factors is the set of values held by an individual (a decision maker) that motivates them to make specific choices and take decisions. But there is another factor that determines the actions of a decision makers. According to G. Homans, an individual will not carry out specific actions or take particular decisions if similar actions or decisions have been ineffective in the past (Homans, 1974). To put it in simple terms, the experience of an individual will be the element of rational choice. And although the decision maker is not sure whether this time a particular choice will bring unsatisfactory results again, he would rather make a different choice than risk another defeat.

The category of rationality is the basis for the concept of rational choice, which is still one of the most popular theoretical concepts in the social sciences, including political sciences. Although it is derived from economic sciences,<sup>2</sup> it may well be used to analyze the behavior of individuals in situations beyond the sphere of economic relations (Michalczyk, 2004, p. 276). The concept of rational choice has evolved over the decades, and has been complemented with new elements (see Frohlich, Oppenheimer, 2006, pp. 235–266; Oppenheimer, 2008; Hay, 2004, pp. 41–46).

The basis of rational choice concept is methodological individualism, assuming that complex social phenomena can be explained by means of decisions taken by individuals.

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<sup>2</sup> Although originally used in economic sciences, the basis of the rational choice theory derives from behavioral psychology, formulated in 1961 by G. Homans (Scott, 2000, p. 127).

The essence of the rational choice theory has been aptly captured by J. Elster, pointing out that individual behaviors of people are a basic component of social life. All social institutions and social changes are the result of individual actions and interactions between individuals (Elster, 1989, pp. 13–21; Scott, 2000, pp. 126–138).

The rational choice theory (RCT) is based on three key elements, one of which is the aforementioned rationality. The first assumption of RCT is quite obvious, as it were implied by the name itself. An individual makes choices on the basis of his or her preferences, beliefs and viewpoints, according to which he or she chooses one option – a solution that is considered the most advantageous from his/her point of view and which ranks highest in the hierarchy of possible decisions. As pointed out by T. Michalczyk, the rationality of the decision maker, and even his/her preference hierarchy, do not allow us to judge the relationship with other individuals and the consequences of the decision for the decision-maker's environment. Rationality in RCT refers only to the individual and his/her preferences. The convergence, coherence of objectives and the choices made pertain only to the decision-making individual. It is precisely in coherence, logical arrangement and consistent decision-making that the rational behavior of decision-makers is manifested (Michalczyk, 2004, p. 278; Becker, 1990, p. 266). The second assumption concerns the category of utility which is expected by an individual making the rational choice. This assumption is connected with G. Homans' approach to making rational choices based on values and experience. The expected utility is associated with the risk of achieving the desired outcome. However, there is always a risk that the decision made (the choice made) will not produce the expected results. Consequently, a rational individual also estimates the probability of a given effect (Homans, 1961, pp. 61–62). The third assumption concerns decision maker's own interest. It is the interest of an individual that determines all his actions. Thus, according to RCT, an individual remains egoistic, not taking into account the impact of his actions on the environment. Unless his impact on the environment can negatively affect the attainment of the objective pursued (Michalczyk, 2004, p. 278).

The theory of rational choice has also been criticized, above all for the lack of clarification of the relationship between the reasons/motives of the rational actors and the actions taken (Hodgson, 2012, pp. 94–96; Zey, 1998, pp. 55–70; Green, Shapiro, 1994). It assumes that individuals take actions according to their own preferences, which are considered to be rational from their point of view. The theory did not allow for conclusions about the reasons for making these rational decisions. This deficiency was complemented by F. Dietrich and Ch. List from the School of Economics by formulating a "reason-based theory of rational choice", i.e. the theory of rational choice based on reasons. The authors have criticized the traditional concept of rational choice for lack of clarification on how the preferences of rational actors are shaped, how they change and modify in the course of discussion, and how they are influenced by other motivations. The authors pointed out that in the course of the development of rational choice theory and focusing on the creation of formal decision models, the sources (motives) of decisions that influence the (rational) decision-making process have been overlooked. Paradoxically, the problem of motivation in decision-making has been addressed in the philosophy, but it has not been formalized as yet (Dietrich, List, 2013, pp. 104–105).

The concept of Dietrich and List is another voice of criticism against the theory of rational choice. The authors do not criticize the rationality of decision makers, but point

out the need to know the motives of their actions, and this element is neglected by the theory of rational choice. The basis of the concept proposed by F. Dietrich and Ch. List is the formulation of the preferences of the decision maker and their hierarchy depending on the motivation that drives them. The authors have introduced a category of “motivationally relevant” propositions, confronted with “normatively relevant” reasons for action, which in practice limit a decision-maker’s choice (Dietrich, List, 2013, p. 105). They indicate how he should behave in accordance with the applicable legal, social and economic norms or a particular value system. Thus, they do not allow the decision maker to behave in a way he actually wants to behave.

The aforementioned element of the rational choice theory based on reasons, as well as the assumption of the possibility for changing decision makers preferences, basically correspond to the decision-making situation, in which the municipal authorities make decisions in the area of education policy. On the one hand, they are motivated by their own interests, and on the other, by a number of normative factors that are linked to the process of public policy rationalization. According to G. Rydlewski, outlining the conditions of public decision making process, a public space is complex and requires decisions to be made within highly diverse social groups, within formalized territorial organizations, as well as in the system of functional and institutional relations existing between the public spheres (Rydlewski, 2011, p. 27). Decisions taken in the public sphere are of a different nature than those in the private or even economic spheres. It should be remembered that, in the public sphere, decision-making entities should act within the framework of their legitimacy and therefore represent the interests of certain social groups (Rydlewski, 2011, p. 27). What is also characteristic of the public sphere is its constant dynamics, which enforces instant reaction to changes and making decisions in accordance with the ongoing transformations. (Rydlewski, 2011, p. 27; Rydlewski, 2012, p. 66; Sztompka, 2007, pp. 21–23). Adequate response to change and taking appropriate decisions is the essence of public governance, which consists in setting goals, creating opportunities for action and using resources, with due regard to the public interest (Kozuch, 2012, pp. 85–86).

### **Methodology of research**

The issues connected with rationalizing education policy of municipalities (with particular regard to the perspective of the executive organs of municipalities) were presented on the basis of results of qualitative research conducted in 12 municipalities located in 3 provinces of Poland. In the first stage, local self-government units were selected, where school closures were noted in the period of 2006–2014. In the second stage, semi-structured interviews were conducted in a group of 60 respondents, including representatives of the authorities (executive and legislative bodies), representatives of the teaching community and the local community (including parents of pupils, residents of the villages or towns where schools were closed down, public officials such as village heads, as well as representatives of non-governmental organizations).

The aim of the analyzes was to verify the circumstances in which one can speak of the actual rationalization of the municipal education policy. Assuming that the “ratio-

nalization of municipal education policy” is a range of measures taken by the municipal authorities, aimed at limiting the budgetary expenditures on education while at the same time providing pupils from the municipality with opportunities for development and adequate conditions for education, the author points to the factors which contributed to the fact that the declared rationalization is merely of a virtual nature.

During the course of the argument, the author verifies the hypothesis assuming that the postulated rationalization of the municipal education policy becomes fictitious when the municipal authorities (executive body) are motivated by their own interests, which is maintaining public support (victory in subsequent elections), rather than economic rationality and public good. The hypothesis will be verified by answering the following research questions: what rationalization measures were taken in the area of education policy by the authorities of the examined municipalities? in what cases can we speak of ”rationalization success”, i.e. the reduction of educational spending ratio in total budget expenditures? to what extent does the position of the executive body influence the process of schools rationalization, including their closures?

### **Rationalization of education policy – ”a wicked problem” of local self-governments in Poland?**

The necessity of rationalizing educational policy affects all municipalities in Poland, especially as education places a heavy strain on the budgets of rural and urban-rural municipalities (Adamowicz, Kmiecinski, 2017, p. 75). In some cases, spending on education accounted for more than 60% of budget expenditures (PAP, 2016). The biggest burden on local governments is created by the expenditure on salaries and their derivatives, which are not decreasing despite a declining number of students. On the contrary, the expenditures on salaries are rising, which is beyond control of local governments (Herbst, 2012, p. 92). In trying to counter the problem of rising expenditures, local governments are taking rationalizing measures to curb spending. The most radical form is the closure of schools,<sup>3</sup> especially the small ones, located in rural areas, which generate the largest expenditure due to a small number of students. It is true that local governments may gradually implement rationalization measures, such as reducing the organizational level of a school by merging classes or giving over the school to a non-public managing entity; however, the aforementioned measures do not ultimately solve the problem of high costs of education, though they can reduce the problem and partially relieve the budget of the municipality. In practice, however, the aforementioned measures are merely a temporary solution and an initial step towards complete closure of the facility. Each of these intermediate solutions has its own advantages and disadvantages, as demonstrated by the results of the research. What seems to be compelling in the context of the problem presented in this article is the behavior of municipal authorities (mayors/village heads) in the face of a school closure. This process is usually controversial and can be a cause

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<sup>3</sup> In the article, the author analyzes only one form of rationalization, i.e. a school closure. However, the authorities may also adopt other measures aimed at expenditure reduction, including reducing the school’s organizational level, joining the classes or transferring/handing over the school to a non-public entity.

of resistance for residents and teachers. It also tends to be used in the political struggle at the local level.

The main reason for school closures has been recently declining number of pupils in primary schools. In 2006, 2,484,891 students were attending primary schools in Poland. In 2014 the number dropped to 2,306,102. The decrease in the number of pupils was particularly visible in rural areas (Kościńska-Baldyga, 2015, p. 8). The decrease in the number of pupils entailed a reduction in the number of schools. In 2006 there were 14,511 schools run by local governments. By 2014 their number had decreased by 6.7%, which is comparable to the change in the number of students.

The problem of school closures is varied territorially, both in the regional breakdown and in the division into rural and urban areas. A falling number of primary school pupils is the consequence of demographic decline and depopulation caused by national and foreign migration. The largest decrease in the number of students was recorded in Podlaskie province – it amounted to 16% in the period of 2006–2014, similarly in Świętokrzyskie province – 16%, and Podkarpackie and Lubelskie – 14%. The smallest decrease in the number of students was recorded in Pomorskie province (1%) and Dolnośląskie province (7%) (CSO, 2017). The decrease in the number of pupils, should theoretically entail a reduction in the number of schools. Despite the liquidation of a number of institutions, this process was not commensurate with the reduced number of students. And this is what explains the ever increasing costs of education (Sobotka, Herczyński, 2014, p. 88).

The biggest number of schools was closed in Świętokrzyskie (16% of schools), Podlaskie (17%) and Lubelskie province (14%). At the other end of the scale, the lowest number of school closures was noted in Pomorskie, Śląskie, Dolnośląskie or Lubuskie province. On the one hand, a slight decrease in the number of schools was due to a specific nature of these regions (industrial, urbanized), their locations, previous rationalization activities, but also the network of schools, which was to a great extent shaped historically (Sobotka, Herczyński, 2014, p. 22; Kuriański, 2008, pp. 199–200).

### **School closures as a form of rationalization of educational policy. The analysis of research results**

The municipalities selected for the study – due to deliberate selection – should be treated as case studies rather than a representative sample. Nevertheless, the problem they all shared was the declining number of students, which calls for changes in the current model of local education policy. In some municipalities the problem of demographic decline was so severe that in the years 2006–2014 there was a decrease of students reaching almost 40%. In the majority of the municipalities the drop was ranging from a dozen to several dozen percent. Only in one of the studied municipalities did the number of pupils decrease by less than 10%. The average for municipalities was 23.5% (BDL, GUS, 2017).

Education was a heavy burden on budgets in all the studied municipalities. In 2006, it was an average of 40.89% of total budget expenditures of municipalities, which in case of some entities – in the respondents' opinion – hindered their further functioning. The situation improved slightly after school closures and in 2014, 35.21% of the total budget expenditure was spent on education (Table 1).

Table 1

## Expenditures on education in researched municipalities in 2006–2014

Entity	Overall expenditure on education		Share of education spending in budget expenditure in %		Increase / decrease in spending on education	Current expenditure on education as % of total current expenditure of the municipality	Current expenditure on education as % of total current expenditure of the municipality	Increase / decrease in current spending on education
	2006	2014	2006	2014				
M_I	7,166,742.41	13,087,047.19	35	38	+3	43	43	0
M_II	7,751,893.41	7,928,424.83	43	36	-7	50	46	-4
M_III	7,936,895.32	10,244,597.25	45	39	-6	51	46	-5
M_IV	4,910,708.60	8,602,355.81	42	37	-5	48	43	-5
P_I	4,831,522.79	6,506,706.24	37	30	-7	41	36	-5
P_II	3,072,058.37	4,154,946.46	40	29	-11	39	33	-6
P_III	11,173,636.82	17,275,752.58	40	29	-11	40	36	-4
P_IV	12,865,418.78	17,317,494.32	43	35	-8	40	37	-3
S_I	7,546,314.25	9,378,927.01	45	37	-8	48	42	-6
S_II	8,797,196.04	10,474,387.11	43	39	-4	46	45	-1
S_III	5,017,050.65	5,751,515.27	39	34	-5	49	43	-6
S_IV	11,188,185.80	19,031,052.03	38	41	+3	48	44	-4

\* No data on current expenditures in the studied municipalities in the period of 2006–2008.

Source: Own study based on the Bank Danych Lokalnych, GUS.

Although the rationalization measures were implemented in all municipalities, they did not bring significant savings everywhere. The need for cost reduction was pointed out by all respondents. Moreover, in case of some municipalities, a slight increase in education expenditure can be observed, despite the closure of some small schools.

When analyzing the structure of expenditure on education, one can observe that the biggest burden to the budgets was created by teachers' salaries, which amounted to 74% in 2008, and in 2014 – 72% of overall current expenditure on education (Table 2).

Table 2

## Expenditures on teachers' salaries in the researched municipalities in the years 2008–2014

Municipality	Share of teachers' salaries* in current municipal expenditures on education		Share of teachers' salaries* in total current expenditures of municipalities		Change
	2008**	2014	2008	2014	
1	2	3	4	5	6
M_I	76	77	33	33	0
M_II	76	65	38	30	-8
M_III	78	76	40	35	-5
M_IV	78	77	37	33	-4
P_I	76	78	31	28	-3
P_II	66	78	26	26	0

	1	2	3	4	5	6
P_III		73	75	29	27	-2
P_IV		70	74	28	27	-1
S_I		70	44	34	18	-15
S_II		74	78	34	35	1
S_III		74	62	36	25	-11
S_IV		77	81	37	36	-1

\* Salaries including derivatives.

\*\* No data on current expenditures in the period of 2006–2007.

Source: Own study based on the Bank Danych Lokalnych, GUS.

The above table shows that despite the implemented rationalization measures, the reduction of expenditure on remuneration was insignificant. In the case of two municipalities, it virtually did not change. And in one municipality it increased by 1%. The biggest savings of up to 11% and 15% have been achieved in the municipalities where the authorities have decided to close down small schools and have not provided teachers with jobs in the only local school that the municipality was legally obliged to maintain. This solution is an example of the most radical approach among the authorities of the examined municipalities. Yet, the process of school closures in these municipalities, as well as its consequences were different. In the case of the S\_I municipality, school closures did not cause social conflicts, as the problem with education was signaled much earlier by municipal authorities. They have prepared the inhabitants for such measures and have taken joint efforts to create local associations capable of taking over schools, as evidenced by the opinion of one of the village mayors:

“We wanted to do it peacefully, I said: we would renovate something before leaving. We have clarified the situation in buildings, that is with Sanitary-Epidemiological Station or National Labor Inspectorate. We handed over the buildings in good condition. The council has adopted a resolution to lend buildings for 6 years. We even went to court with some of them to register, because they did not know how to go about it [...] For someone who is not working in school, setting up an association it is a big deal” (interview: S/I/W).

In the case of the municipality S\_III, the generated savings resulted from the decision to close down the schools and not employ teachers. The lack of job offers for the employees of small schools intended to close has also proved to be a motivating factor for establishing the associations willing to run schools. In the case of this municipality, however, it is difficult to talk about a partnership, since the municipality authorities clearly distanced themselves from this solution. They have handed over the school buildings to new associations, albeit without any additional support. The lack of cooperation with teachers and the local community was the reason for the protests and social opposition. This is reflected by the opinion of the headmistress of the school run by the association (and the founder of the association willing to run the school):

“First off indignation. And later ... just like people ... well, there was a hesitation for half a year. Will we manage? How to go about it? Shall we get down to it? Yes – we consulted with other associations. Although 6 years ago there were not so many of them [...]” (interview: S/III/R2/N/ST).

In both aforementioned cases, radical decisions were taken by the authorities enjoying wide social support, albeit fully aware of possible social consequences. This is reflected by responses of the village mayors to the question whether they were considering the consequences of school closures and feared the results of the next election:

“At that moment, I would have no chance, I’d lose the elections. Definitely. The election was in 2 years, people saw that the associations were functioning, that nothing really worsened” (interview: S/I/W).

“Yes, yes, yes. I was worried but I was concerned with the economy. Because it would knock my municipality down. I could not take the loan then. Only for investment and repayment of the loan, and earlier it was possible to take it for education, for the current ... And when there was no... then I could either close down, or it would mean the bankruptcy of the municipality...” (interview: S/III/W).

Most municipalities have opted for much softer solutions, which at the same time do not lead to a reduction in educational expenditures. Apart from the declared need for cost reduction, there were other issues that proved to be important, such as parents’ concerns about children’s transport, an integrative role of the school (building) in the rural community and the commitment to preserve it, as well as the role of teachers, who in some municipalities were trying to stand up for the schools intended for closure and mobilize residents to defend the facility, encouraging them to rebel against the authorities. The last argument turned out to be crucial. It was in the best interest of the teachers to maintain the existing *status quo*. They were neither convinced by rational arguments about the burden on the municipal budget, nor the teaching conditions or limited opportunities for children development in small groups. From the teachers’ point of view, it was rational to keep the jobs and the current employment conditions (Teachers’ Charter). Therefore, they did not agree to any changes – including maintenance of the school network in the present shape, but with a change of school authority into a non-public entity. Although such a solution would, on the one hand, significantly relieve the municipality budget, while at the same time ensuring jobs for teachers, in practice it was rarely accepted by this social group.

Teachers’ resistance in some municipalities has softened the position of the authorities and resulted in employing some teachers in the remaining municipal schools (on a full-time or part-time basis) or providing them with other posts in the municipality. In attempting to counter the resistance of teachers, the authorities of some municipalities went as far as to adopt ethically questionable solutions in order to break up the teaching community (employing some of them or offering a job to a headmaster) or to gain the favor of local community, e.g. by promising investment for the town or jobs for some residents. In some municipalities, however, the teachers and parents decided to set up associations to run schools, and the process of school liquidation itself proved to be an opportunity for social mobilization. This is evidenced by the opinion of one of the teachers of municipal school, then a co-founder of the association and now a headmaster of the association school:

“So we were backed into a corner. That if we don’t do something, don’t set up the association, then ... there will be no work” (interview: M/II/DS/N/ST1).

In part of the studied municipalities, the authorities were not aiming at job cuts from the beginning, well aware of small savings associated with such a form of education pol-

icy rationalization. In these municipalities, it was more about rationalizing a school network and improving teaching conditions rather than cutting costs. The issue of teachers employment was also taken into consideration. The authorities of some municipalities emphasized that they were also the inhabitants of the municipality and that they could not be deprived of their work. The question of possible influence of teachers' community on the decisions of other residents was taken into account, too. Therefore, the authorities of the municipalities, having decided to close down the schools, immediately declared employment security for teachers, thus securing support of the teaching community, who – assured of keeping their jobs – became the ambassadors of the authorities, trying to convince the local community that the decision to close down a small school was right. The following opinions confirm the above points. An opinion of the village mayor of one of the municipalities in Pomorskie province:

“I must admit that I got prepared for it. After the experience of the previous liquidation,<sup>4</sup> I offered jobs to everyone, from the headmaster to the cleaner and the fireman” (interview: P/II/W).

Opinion of the mayor in one of the municipalities in Pomorskie province:

“The teachers of the schools where the children were to come were my ambassadors [...] It was not buying teachers. This was the moment when I could provide people with jobs. We had always cared for jobs; if we'd put it off, there might not have been such opportunity later” (interview: P/III/W).

The processes of rationalizing education policy in municipalities cannot be perceived as one-dimensional phenomena and narrowed down to economic issues. Unquestionably high costs of carrying out educational tasks in rural and urban-rural municipalities have contributed to introducing changes. However, both the implemented rationalizing solutions and the relations with particular social groups, including the key group in the case of educational policy, i.e. teachers were determined by the authorities' conviction about the scale of support, their position in the local community and further plans. However, it should be noted that the local authorities, particularly the executive bodies, which were fully responsible for decisions about school closures, overestimated the importance of the school in the local community, as well as the opinion-forming nature of the teachers. And they were unnecessarily apprehensive about the negative consequences of even the most radical decisions.<sup>5</sup> Despite the carried out closures – in the studied municipalities – none of the village heads/mayors lost their posts due to the liquidation of schools.

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<sup>4</sup> The interviewed mayor, during the previous closure of schools in researched municipality, was the chairman of the council. He had the opportunity to observe the consequences of such a decision, which affected strongly the contemporary mayor. The loss of public support and ensued conflict between local authorities and community was not so much a result of the decision to liquidate the schools but the result of the way in which the liquidation has been done.

<sup>5</sup> The results of a research conducted in the Podkarpackie province in 2012 in rural and urban-rural municipalities indicate that executive bodies are apprehensive about the consequences of school closures. As many as 84.6% of the surveyed mayors said that the municipality was able to bear the high costs of education policy due to “social considerations”. At the same time, 23% pointed out that school closedown was too difficult to implement. It can be assumed that it is about “difficulties” in the social dimension, because it is not a complicated process formally. 7.7% of respondents indicated that school closedown was a “political suicide” (Kotarba, 2014, pp. 53–71).

Only in two of the studied municipalities there have been replacements of village heads, though they were not related to school closures.<sup>6</sup>

### Conclusions

The rationalization of education policy of the Polish municipalities was enforced by two, coupled factors – the demographic decline and high costs of educational tasks. The problem of intervention in this area affected particularly rural and urban-rural municipalities, where education was a heavy financial burden. For a few years, local governments have been trying to reduce costs by taking various measures to reorganize school system in their own area. The solution that brings about noticeable financial effects is the liquidation of some schools (with a small number of students) combined with the reduction in teachers' posts. This solution, albeit easy to adapt in theory, is much more difficult to implement in practice due to the specificity of local communities and the main stakeholder that loses out most as a result, i.e. the teachers.

The authorities of the municipalities, aware of the teachers' role in the local community and their impact on the local residents, rarely resort to radical solutions. On the one hand, their aim is not to aggravate the situation of one of the social groups that are, after all, a part of the local community. On the other hand, implementing "safe" solutions results from pursuing their own interests – the fear of losing public support, which is particularly important when planning a further political career. It seems rational from the perspective of the municipality to avoid social conflict and find a solution that satisfies others. This also explains the economically irrational solutions implemented in most of the studied municipalities. Although they did not bring financial savings, they proved to be socially beneficial from the perspective of the municipal authorities.

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<sup>6</sup> One of the mayors (municipality in Mazowieckie province) did not run in the following election on grounds of age. In another municipality, the mayor stood for the election, but did not win it. As he himself stated, the reason was probably not related to school closures, which is reflected in the following opinion: "It is hard to say. Did it matter? To some extent it did. After all, the electoral district in Y (a village in Świętokrzyskie province, where the school was closed – the author's note) is small. And it did not in fact contribute to my losing the election. Y is an electoral district with very few voters. I do not remember now. But they were really noisy. Especially the present mayor..." (interview: S/II/bW).

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## **Kiedy racjonalność spotyka się z interesem politycznym. Problemy racjonalizacji polityki edukacyjnej w polskich gminach**

### **Streszczenie**

W artykule przedstawiono wyniki badań dotyczących racjonalizacji polityki oświatowej w gminach wiejskich i miejsko-wiejskich. Autorka koncentruje się na najbardziej radykalnym rozwiązaniu racjonalizatorskim, jakim jest likwidacja szkół. Rozwiązanie to choć zasadne pod względem ekonomicznym może okazać się kosztowne w wymiarze społecznym. W artykule autorka weryfikuje hipotezę zakładającą, że postulowana racjonalizacja polityki oświatowej gmin staje się fikcją w sytuacji, gdy władze gmin (organ wykonawczy) kierują się własnym interesem, którym jest utrzymanie poparcia społecznego (zwycięstwo w kolejnych wyborach), a nie racjonalnością ekonomiczną oraz dobrem publicznym.

Problem racjonalizacji sieci szkół w gminach autorka analizowała na gruncie teorii racjonalnego wyboru. Artykuł powstał na podstawie badań literatury przedmiotu oraz danych ilościowych, jak również badań empirycznych przeprowadzonych w wybranych gminach w formie półstrukturyzowanych wywiadów. W badaniach korzystano z metody porównawczej, elementów analizy systemowej oraz metod jakościowych. W dwuetapowym procesie autorka badań dokonała wyboru gmin zlokalizowanych w trzech województwach (świętokrzyskim, mazowieckim i pomorskim), a następnie 60 respondentów spośród następujących grup: władze gmin (organ wykonawczy i przedstawiciele organu stanowiącego), nauczyciele, podmioty niepubliczne prowadzące szkoły, członkowie społeczności lokalnych i liderzy lokalni.

**Słowa kluczowe:** polityka oświatowa, racjonalizacja oświaty, teoria wyboru publicznego, polityka publiczna, likwidacja szkół