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Directions for educational planning

From time to time, IIEP takes stock of the broad field within which it works and to which it contributes. This helps to identify past achievements, challenges and trends, and look to the future to identify domains in which IIEP should anticipate needs.

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These concerns were the focus of a Symposium organized by IIEP in July 2008. The event attracted over 80 participants and a wealth of expertise from all continents. At one end of the spectrum were ministers of education, planners, trainers and retired educationalists who reflected on their experiences over the decades; at the other end were colleagues starting their careers with all the enthusiasm, energy and commitment of youth.

The event was organized in honour of the work of Françoise Caillods, who is well known to regular readers of this newsletter and to all those who have had close links with IIEP. After nearly four decades of service, Françoise



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Caillods was on the eve of retirement. The Symposium was an opportunity to look back over these decades, addressing particularly the themes Françoise had worked on, to identify changes, and to learn lessons for the future. Françoise participated very actively in the event, bringing her own continuing fresh vision and ideas while reflecting on the past.

This issue of the newsletter highlights some of the discussions. It notes the combination of excitement and challenges that characterizes the work of IIEP in its service to Member States of diverse sizes, political frameworks and economic contexts. The event included focus on both broad parameters and more technical aspects of planning. Some major conclusions

are summarized here, and others will be presented in future publications.

Milestones and evolution

Some of the milestones identified by participants were part of the history of IIEP itself. One of these was the 1970 publication by the Institute's first director, Philip Coombs, *What is educational planning?*¹. It was the first booklet in IIEP's flagship series, 'Fundamentals of Educational Planning', and helped to define the field.

Later, there was the 1989 volume edited by Françoise Caillods, *The prospects for educational planning*. Produced following IIEP's 25th anniversary seminar, this book is wide-ranging, somewhat sober, and much influenced by the economic climate of that period.

Other milestones include the 1990 World Conference on Education for All in Jomtien, Thailand, and its 2000 successor in Dakar, Senegal. These events brought renewed energy. They emphasized planning as a key instrument to achieve the goals of Education for All (EFA), and have been followed up through the Fast Track Initiative (FTI) and other international collaborative efforts.

Yet while much of the EFA agenda has been on quantitative targets, what pupils actually learn in school requires more attention. The Symposium described the emergence of this focus as a 'quiet revolution'. IIEP has been among the agencies at the forefront of this work, particularly with the learning assessments undertaken through the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ). Symposium participants noted that planning for learning requires emphases that may be neglected by planners who focus entirely on the expansion of education systems.

Capacity development

Other challenges remain in capacity development, which is at the heart of IIEP's mandate. While many countries

have risen to impressive heights, others have been less successful. The latter require persistent efforts as well as some rethinking of strategies. While the training of individuals can be a good mode for capacity development, efforts need to go further and address organizations and enabling environments.

In many countries, the challenges are increased by decentralization, which requires good planning skills at provincial, district and even school levels, and may considerably increase the demands for capable personnel. IIEP endeavours to respond to these needs, while also recognizing the increased roles that may be played by non-governmental organizations (NGOs) and the private sector.

Future directions

The discussions in the Symposium provided a guide for future directions in the field. New technologies will present new opportunities; but the forces of globalization, which are intensified by these technologies, require attention to shifting balances of power and the protection of the groups that may be marginalized. Emphases may also need to shift from inputs to outcomes, and from forms of schooling to centres of learning. Increased migration within and across national borders is an equally important issue, and achievements in basic education are increasing pressures at post-basic levels.



N.V. Varghese and Françoise Caillods



Discussion group during the Symposium



Current and previous directors of IIEP: Mark Bray and Gudmund Hernes

IIEP has been at the forefront of many of these shifts during the last decades. Françoise Caillods has handed the baton to younger generations, who grasp it with commitment and vision. We look forward to continued informal contact with Françoise during a retirement which shows every prospect of being as active as her previous work. ■

¹ Available at: <http://unesdoc.unesco.org/images/0007/000766/076671eo.pdf>

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Economic crisis and the role of the state

A major theme of IIEP's July 2008 symposium was the role of the state. At the time of the Institute's creation in 1963, non-state actors were modest in scale and influence. In Hungary (see p. 12), the state was the sole provider of formal education. Elsewhere, churches and other private bodies operated schools, but within frameworks and settings provided by the state.

Since then, non-government actors have become more prominent. In some cases, this has been by default, because governments have been unable to meet the rapidly expanding demand. In others, the role of non-state actors has reflected increased pressure for plurality in education systems. These shifts have often been accompanied by decentralization of state functions.

The trends which emerged over the ensuing decades received major jolts, such as the 1991 collapse of the Soviet Union. Shortly after the July 2008 Symposium, the world received another jolt: the financial crisis that triggered the most serious economic turmoil since the Great Depression of the 1930s. The core events commenced in the USA before spreading rapidly around the world. As banks were threatened, stock markets plunged and national economies accelerated towards recession, the fragility of the market system and the close interconnectedness of our globalized financial and economic systems became very obvious.

While education systems were not the main focus of concern during these dramatic events, the jolt will have major implications for education. On one level, the events show the importance of regulation and the danger of unfettered entrepreneurialism. And international markets for education operate alongside those for other services, most obviously in cross-border flows of university students.

Yet, the crisis will not necessarily lead to a resurgence of state control of education around the world, since much depends on the availability of resources. Responding to the crisis, governments in rich countries poured billions of dollars into banks and other private institutions. When public funds are allocated to economic institutions, they cease to be available for the social sector, including education.

From the perspective of global inequalities, there is a serious risk that governments in industrialized countries may seek to cover their financial losses by cutting foreign aid to poor countries. Although significant progress has been made towards providing Education for All, strengthened aid flows are needed to fill the remaining gaps. The threat to these flows must be taken seriously.

As these events have stressed, planners cannot take economic and political structures for granted. Globalization has brought many benefits, but it has also increased the vulnerabilities. Governments in low-income countries are therefore as threatened by the crisis as their counterparts in high-income countries. IIEP will be monitoring trends, accompanying planners in the new circumstances, and continuing to provide support for the education sector in developing countries. ■

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International Institute
 for Educational Planning



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Planning Reviewing the concept

There is a new generation at IIEP, and the Symposium in July 2008 was an opportune time to review past concepts and rethink the future for educational planning.

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The generation that set up IIEP in the 1960s had a lasting effect on education systems worldwide, and education ministries, planning directorates and universities in many countries are staffed by personnel trained by or associated with IIEP. But how does IIEP move ahead from here?

The ideas that shaped the thinking of a generation of decision-makers in education were reviewed during the Symposium on *Directions in educational planning* (Paris, July 2008). Several sessions were devoted to how educational planning techniques have evolved over the decades, and to emerging trends and their relevance.

New challenges

Decentralization greatly affects the way education is planned at different levels of the

system. The wider the range of situations, the more diverse the challenges that need to be met. For example, in Senegal there is currently a move towards delegating responsibilities to the regions, whereas in Caucasian countries radical reforms have directly transferred more authority to schools. Decentralization generates new needs for capacity development in educational planning at different levels of administration.

Despite years of decentralization, many problems still remain. Staff at decentralized levels lack training. Management and financial information systems are inadequate and unreliable. There are very often problems of co-ordination between elected local representatives and delegated local education authorities. And, stakeholders at the decentralized levels are insufficiently involved.

Formalized communication processes, both top-down and bottom-up, are lacking for joint planning ventures. The point of departure for the planning process is not always well determined: should it be from the decentralized level or the national level? There is a need to find ways and means that allow for more effective joint planning at different levels. New tools for microplanning may benefit from the potential of geographical information systems (GIS), often available as open software, for participative planning and greater stakeholder involvement.

Emerging trends

Strategic planning is crucial to formulating an education plan. Compared to other socio-economic sectors, education involves more complex and multi-dimensional issues. When managing student flows and public finance, difficult decisions must be taken to regulate the utilization of resources without causing serious disruption or dysfunctioning. Planning has become increasingly complex, involving more diversified and specialized tasks, such as the use of simulation models based on indicators and projections. Also, planners need the skills to perform these tasks.

Regional experiences vary, but in all parts of the world social inequality is closely related

This article is based on papers presented at the IIEP 2008 Symposium under *Theme 1: Macro-planning and micro-planning*, which can be downloaded at: www.iiep.unesco.org/index.php?id=653

to educational policy. The probability of staying in the education system is higher for the richer sections of the population compared to poorer groups. These factors require continued attention and delicate political balances which may evolve over time.

Decision-makers need to know what has worked, what has not, and why. Just as the proof of a good cake is in its cooking, so the quality of planning is dependent on implementation, innovation and assessment. In today's globalized world, the multiple stakeholders in education need to re-visit international experience, and make use of it.

Relevance, but for whom?

Emphasis on Education for All has prioritized basic and primary education for action, policy analysis, planning, support and funding. This has resulted in other levels (pre-school, secondary, technical and vocational, and tertiary) receiving less attention. As primary and, in some countries, lower secondary education become universal, increased pressure is being put on the higher levels.

Is it necessary to regulate student flows and stream them towards specific branches at the secondary level? Should

a choice be made between general secondary curricula or more specialized technical and vocational courses, bearing in mind the needs of the informal sector and self-employment? How do employment opportunities and the incomes of graduates from the different levels evolve over time?

These are some of the many questions which were raised at the IIEP Symposium. The answers must be worked out in specific national and sub-national settings, but IIEP will be glad to assist Member States in the process by providing its unique technical expertise gained in cross-national contexts. ■

Henri Bartoli died on 2 October 2008, aged 90. He was Professor Emeritus of Economics at the University of Paris, French World War II resistance fighter, and member of the IIEP Governing Board from 1985 to 1993.

Born on 22 April 1918 in Lyons, Henri Bartoli was one of the great 20th Century French humanists. Shortly after the outset of World War II, he became involved in resistance work, saving many people from deportation.

From 1943, Henri Bartoli worked with a committee of experts who prepared the economic and social policy for post-war France. Inspired by the British welfare state, he helped lay the foundations for the French *sécurité sociale* system and set up *comités d'entreprises* – worker committees – whose members are elected by staff to liaise with management on issues relating to staff welfare, salaries and the general running of companies. He

was also a key figure in developing the concept of planning in France.

After the war, Henri Bartoli became Professor of Economics at the Universities of Grenoble and subsequently Paris (Sorbonne). His lectures, books and articles focused on social economics and the history of economic thought – a far cry from the management models fashionable in the 1970s.

A great intellectual and a prodigious author, Henri Bartoli made a unique contribution to the discussions of the IIEP Governing Board during his eight-year mandate. One of his recent books, *Rethinking development: putting an end to poverty*, published by UNESCO in 2000, should probably be recommended reading for all those involved in the planning of development. The book asserts that if major prospects of progress are to be opened up for human beings, and if the struggle against multidimensional poverty is to be successful

throughout the world, the current action programmes and reliance on globalization are inadequate. A new paradigm must be defined and new strategies proposed. Rules, institutions and procedures must be invented to strengthen the governance and governability of the economy at global, regional and local levels.

Towards the end of his life, Henri Bartoli returned to the notion of resistance and its importance today. His message was: *“To resist is to fight against unemployment, poverty, the decline of cultural values and the regression of social benefits. Rather than simply aiming to produce goods and services, to accumulate capital and make benefits in a world scrupulously manipulated by muddled policies, economics should be a ‘life work’ aiming to serve ‘life’ itself”*. These are sobering thoughts for today's troubled economies. ■

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This article is based on the obituary published in *Le Monde*, 7 October 2008.
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Obituary

Henri Bartoli dies at 90



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FURTHER READING

- *Rethinking development: putting an end to poverty*. UNESCO, 2000. www.unesco.org/most/bartoli2.htm
- *L'économie, service de la vie. Crise du capitalisme – une politique de civilisation*. Presses Universitaires de Grenoble, 1996. www.pug.fr/titre.asp?Num=724
- As an introduction to Henri Bartoli, the man and his ideas, see: www.dailymotion.com/video/x17l3u_henri-bartoli-entretien_politics (in French)



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Education, poverty and development

Education contributes to development and reduces poverty. But is it so simple? The general assumptions of the international education community, have taken a beating in recent decades.

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Rapid educational expansion and increased access to schooling have not systematically resulted in economic growth and reduced poverty. In fact, global economic disparities have increased. This is most evident in sub-Saharan Africa, but also in OECD countries where the problem of youth unemployment, even among the well-educated, remains a headache to policy-makers. Nonetheless, as recent research on the role of human capital in economic development points out, it is not that education does not contribute to development, but rather that it only does so under certain circumstances. So, what explains the lack of systematic relationship between education and development? This answer is intricate and the July Symposium offers some useful insights. Participants focused on both the content and context of education.

Concerning content, some participants stressed the importance of science education. Yet, offering good quality science education remains challenging, as it is both expensive to provide laboratories and specialized equipment, and difficult to attract well-qualified science teachers. The problem is most acute in least developed countries, which risk being excluded from the benefits of globalization and becoming victims of this process. At the same time, the shift from general skills to the less employment-oriented concept of 'life skills' (e.g. HIV and AIDS prevention, human rights and violence prevention), shows the importance of balance and breadth in curriculum.

Concerning the context of education, two issues were highlighted. First, the changes in the job market: the straightforward path which allowed graduates to enter the job market immediately in a steady job no longer exists. The path from school to work has become much more complex and difficult to control. Second, education is only one of the assets that poor people need. They also need a society which respects the law, security of property, access to affordable credit and basic infrastructure. Even in OECD countries, where the state has set up tools to help disadvantaged groups, the more elusive access to social capital (networks of personal contacts, access to relevant information and mastery of attitudes required by future employers) explains why youth unemployment is still concentrated among the lower social classes.

Some programmes which have been successful in breaking poverty barriers and linking education more closely to the world of work were presented at the Symposium. They have three distinguishing characteristics. First, their curriculum goes beyond theoretical knowledge or even specific technical skills, to include 'transversal' skills such as 'reasoning' and 'relating', more useful to youngsters in today's volatile labour markets. Second, the effective teachers working with disadvantaged youth are commonly 'educators' or 'coaches' who give close and individualized attention to each student. Third, these programmes are more flexible than the traditional school with its rigid timetables and inflexible class

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structure, and are organized to fit in with student constraints. Unfortunately, these programmes remain exceptions and are defined mainly by what they are not: they are 'non' formal and focus on the 'dis'advantaged. It is not simply a question of integrating them into the formal system, by creating pathways and common qualification frameworks, but of changing the characteristics of the formal system.

This raises an even more fundamental challenge: how can education become part of a global social policy focusing on equity and fighting poverty? Designing and implementing

such a policy is the responsibility of the state. While individual efforts have their role to play, the state has to ensure that the playing field is level. In least developed countries, however, government is weak, with little outreach to remote regions or among the poorest groups. In some cases, the state has been kidnapped by a corrupt elite chiefly interested in personal enrichment. Building effective states which design equitable policies is a precondition to developing a sustainable education system that contributes to social development and reducing poverty. ■



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The number of poor people deprived of their basic education rights remains very large. Southern Asia has the greatest number of poor people (522 million) living on less than US\$1 a day. Low levels of literacy and life skills contribute to the perpetuation of poverty. Hence, literacy and education are important elements in poverty reduction strategies.

The strategies to expand education, especially in the context of poverty, should include alternatives to traditional formal schooling. Field studies from countries such as Bangladesh, China, India, Indonesia, the Philippines and Thailand show that their governments recognize the need for alternatives to formal schooling. The authorities have introduced non-formal education (NFE) programmes which are closely linked to income-generating activities and poverty alleviation.

In Thailand and Indonesia,

the NFE programme was seen as an important catalytic input in the market liberalization process, and income generation became a part of this programme. The community-based organizations (CBOs) anchored these programmes. In the Philippines, NFE programmes of a similar vein rely on non-governmental organizations for implementation.

Some NFE programmes in India and Bangladesh are explicit in their focus on education for out-of-school children and adult illiterates and semi-literates through literacy and continuing education programmes. In China, NFE and income-generation programmes are an important means of extending science and technology education to rural areas. These programmes are conceived within the larger framework of poverty alleviation through skills building and human resources development.

A closer analysis of

contents of the literacy programmes shows that the skills covered by the NFE programmes vary widely. However, an overall emphasis on training in *entrepreneurship* and *practical knowledge of science and technology* seems to be central to these NFE programmes. Furthermore, the traditional view of NFE programmes as compensatory for disadvantaged adults has changed as they now address young people with courses of long duration and long-term effects, whereas most courses for adults are directly linked to their current occupations and are of short duration.

It becomes clear from the field studies that NFE programmes which adapt literacy skills to the economic life of learners have a greater potential to succeed than those focusing purely on overcoming illiteracy as their main goal. ■

Non-formal education and poverty alleviation The Asian experience

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This article is based on the paper presented by R. Govinda to the IIEP 2008 Symposium, *Non-formal education, poverty and development*, which can be downloaded at: www.iiep.unesco.org/index.php?id=653



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Education in Rwanda: past, present and future

FURTHER INFORMATION

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For more information on DFID and its activities, see:

www.dfid.gov.uk

IIEP has published two major studies of education and reconstruction in Rwanda:

Lyndsay Bird. 2003. *Surviving school: education for refugee children from Rwanda, 1994-1996*. <http://unesdoc.unesco.org/images/0013/001330/133047e.pdf>

Anna Obura. 2003. *Never again: educational reconstruction in Rwanda*. <http://unesdoc.unesco.org/images/0013/001330/133051e.pdf>

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Developments in the Rwandan education system have to be understood against the background of the 1994 events and its consequences for country's human resources and government institutions. The genocide initially flung the country into an emergency situation. It gradually moved towards a post-conflict development situation. Post-genocide educational reforms aimed at reconstructing a ravaged system through mobilizing resources and reopening primary schools as quickly as possible. Primary school enrolments grew considerably through expanding and rehabilitating classrooms, double-shifting, distributing school supplies and the abolition of school fees in 2003. Soon after the 1994 events, the Government of Rwanda prioritized higher education in order to accelerate the development of human resources and the economy.

Rwanda's education in the current decade is characterized by a Sector-Wide Approach (SWAp), the new aid architecture, and

ambitious development targets. In 2003, the ministry of education (MINEDUC) published its first Education Sector Strategic Plan (ESSP) and was thereby the first ministry in the country to launch a SWAp. The plan aims to support the country to achieve its 'Vision 2020', which is to become the knowledge hub of the region, giving special attention to science and technology and the development of human capital.

Having progressed fast on the foundations for a stable society and establishing strong state institutions, Rwanda has been able to attract external sources to help finance the ambitious plans. Whilst the education SWAp initially focused on preparing credible strategic plans and budgets, it swiftly evolved into the Joint Education Sector Support Programme (JESS). This programme supports the implementation of the ESSP 2006-2010 through a sector budget support programme and a capacity development support pooled fund. Resources from the Fast Track Initiative (FTI) catalytic fund are channelled through this programme along with financial support from bilateral and multilateral donors.

JESS has channelled increased financing to the sector, and helped to promote co-ordination of all support to the education sector, regardless of the aid modality. It has also contributed to optimizing public-private partnerships and establishing co-operation with the Global Education Alliance, a multi-stakeholder public-private partnership that will help fast-track progress on information and communication technologies (ICTs).

Partially thanks to external financing, the decade witnessed incremental capitation grants for primary and lower secondary schools, resulting in an officially fee-free nine years of basic education. Teacher, textbook and classroom numbers considerably increased to cope with growing student numbers. Official figures report over 95 per cent enrolment in primary school in 2007 with an equal share for girls. Not all is rosy though. Whilst enrolment may be significant, the system suffers from inefficiency: many primary pupils repeat grades or drop out of school before completion. Quality is generally poor and efforts to improve the curriculum, to provide better quality learning and teaching materials, and to better train and

support teachers, have yet to make their impact.

A joint review of the education sector of June 2008 acknowledged the challenges of a good quality nine-year basic education. Medium-term plans reflect the government's concern to fast-track progress over the next few years. At the same time, MINEDUC has to step up the development of post-basic education and technical and vocational education and training (TVET). This is required by a recent shift of focus towards skills development for the labour market and economic growth, as stipulated in the

country's second generation poverty-reduction strategy. This shift is reflected in a recent update of the ESSP and current preparations to update a long-term strategic and financial framework, which will comprise important new strategic costed scenarios for ICTs, post-basic education, and TVET.

Great ambitions and expansion of post-basic education require matching resources, especially if the expansion is not to threaten the efficiency and quality of the country's basic education. Even though domestic resources for education have gradually increased over

time, and new donors have come on board, a funding gap looms from 2009 onwards. The government is looking into potential new donors and expanded catalytic funding from the FTI, whilst also exploring cost efficiency and partnerships with the non-state sector. Given that many more countries will be competing for limited FTI resources, there is as yet no guarantee that Rwanda will gain access to expanded funding. The search for affordable and equitable options for expansion will be a major exercise for the coming years. ■

Education systems in sub-Saharan Africa are undergoing a serious crisis, due to a lack of strategic planning, low supply of education (particularly in rural areas and for girls), lack of funds and long civil wars. As a result, inequalities in access to primary education persist and educational quality is mediocre. However, administration is over-centralized, leading to faulty management and to a lack of funding for basic education. This was the core message from Aïcha Bah Diallo to IIEP's July 2008 Symposium, drawing on her wide experience across Africa and as former Minister of Education in Guinea.

Yet, despite these challenges, several sub-Saharan African countries have successfully rehabilitated their education systems. Guinea is one of them. Its adjustment programme for the education sector, PASE, which started in 1991 with support from several international organizations and NGOs, has helped to increase enrolment rates and to improve the system's management.

Several pilot projects also helped to increase the numbers of girls enrolled in school. The creation of NAFA¹ centres provided literacy programmes for out-of-school adolescents, while technical training prepared them for financial autonomy. The National Equity Committee was set up to promote the schooling of girls and to monitor enrolments with a view to reducing gender disparities in schools. The FAST programme (*Women of Africa, science and technology*), launched via radio and television, provided professional guidance for young girls and

encouraged them to enter sectors where they were under-represented. FAST was funded by the Canadian Agency for International Development (CIDA) who also supported a number of sectoral studies on the country's needs for technical training and vocational education. These studies helped to define suitably adapted policies.

Lessons learned

One of the lessons learned from Guinea's success in tackling gender disparities in literacy is the need to work through African networks, both regional and sub-regional. Continuity and sustainability are also important. The PASE programme owed its success to the fact that the team remained unchanged throughout the programme's implementation. The same team launched PASE II in July 1996.

Finally, when implementing education programmes, it is important to link them to other development projects (such as village hydraulic systems, health education and hygiene), to use distance education to reach those in remote areas, and to create platforms allowing pupils to move easily from formal to non-formal programmes.

Development partners and IIEP accompany African countries in their efforts to increase access to education. They help the countries to diagnose the weaknesses of their systems, and to set up and adapt monitoring tools in order to better evaluate and define their needs. ■

Tackling inequalities in Guinea

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This article is based on the paper presented by Aïcha Bah Diallo to the IIEP 2008 Symposium, *La planification de l'éducation en développement en Afrique au sud du Sahara*, which can be downloaded at: www.iiep.unesco.org/index.php?id=653.

Former Minister of Education in Guinea and Director of Basic Education in UNESCO, Ms Bah Diallo also helped found the Forum for African Women Educationalists (FAWE) in 1992. For more biographical details, see: *60 women contributing to the 60 years of UNESCO. Constructing the foundations of peace*. UNESCO, 2006. <http://unesdoc.unesco.org/images/0014/001475/147530e.pdf>

¹ NAFA (*nomenclature d'activités française pour l'artisanat*) centres are also called 'second-chance schools'.



Educational financing

Planning towards 2015

FURTHER READING

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Lewin K.M., Caillods F. 2001. *Financing secondary education in developing countries: strategies for sustainable growth*. IIEP.
<http://unesdoc.unesco.org/images/0012/001248/124844e.pdf>

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Educational planning and financing have changed over the last four decades. IIEP's professionals have contributed to the shifts in emphasis and the development of new approaches, identifying some of the new challenges generated by the changing context for educational investment in low-income countries. Two challenges are highlighted below.

First, national planning systems with limited capacity have become preoccupied with a narrow agenda for development which has stressed investment in universal primary schooling and gender equity at the expense of other educational investment needs. It is important to remember that the Millennium Development Goals (MDGs) and Education for All (EFA) objectives are lists rather than recipes for development. If achieved, they provide no guarantee that development will take place in a sustainable way.

If either of these lists had been generated in 2008, they might have looked very

different. Perhaps there would have been more emphasis on secondary and higher education, regulated partnerships with private providers, environmental issues, and the educational investment needed for sustainable economic growth.

Though there have been notable EFA successes where access to basic education has improved, there are also counter examples where growth in participation has stalled, quality has fallen dramatically, demand-side failure has appeared alongside continued difficulties with the supply of educational services, and scarce financial resources have been wasted. A major challenge for planners is to step outside the straitjacket of the EFA objectives and the MDGs, revisit these with the benefit of hindsight, learn from the experience of what has happened since they were adopted, and contribute to more nuanced approaches to goal-setting in context.

Second, financing educational provision at secondary level and above has become a new preoccupation of policy-makers in low-income countries. Universal participation to the end of primary requires transition rates into secondary to at least keep pace with expanded numbers of primary completers. Gender equity at secondary level is rarely achieved in poor countries where gross enrolment rates are less than 50 per cent. Increasingly, lower secondary, and sometimes upper secondary, are regarded as part of the basic education cycle. And economic growth is widely linked to the proportions of the labour force that have completed secondary education and above.

In sub-Saharan Africa and much of South Asia, the public costs of secondary schooling are on average at least four times as much per child as at primary. This alone means that without reform, universal access would require more than half of the education budget – a level which is unlikely to be financed. Most secondary systems remain fee paying, and the poorest households continue to be excluded by the direct costs of attendance. Reforms are needed to reduce public costs per student, transfer costs to those who can afford to pay, and subsidize those from poorer households,

all while maintaining and improving learning achievement. Without this, the legacy of EFA could be disappointing.

These two concerns (how to build beyond and escape from the constraints of the MDGs and EFA objectives and how to finance expanded participation at secondary and above) will be important through 2015 and beyond. As a new period of global recession and austerity approaches, planning for more efficient use of scarce financial resources will become critical for development. ■

Twenty years ago, discussions at the seminar marking IIEP's 25th anniversary focused on the effects of the economic crises at that time on educational financing. Concerns then were mainly on how to make the best use of resources available, reduce costs, and share costs with families and communities. A further question was how to redefine the state role to prioritize basic education and disadvantaged groups.

These remained the focal points of attention over the next two decades.

Participants in the 2008 IIEP Symposium *Directions in educational planning* noted that interest in education systems has not waned. However, it has evolved. Education for All (EFA) objectives now encompass basic education (a larger sector than primary), and more attention is paid to quality. A newly-emerging challenge is to see how the expansion of secondary

education can be financed.

'Partnering' has become a key word incorporating parents and communities, public and private sectors, and external partners. Providing schooling for disadvantaged groups has led to new ideas regarding school fees and whether they should be abolished for basic education.

But among the ongoing concerns is evolution in international development aid mechanisms. The Symposium contributions from Iris Uyttersprot (UK Department for International Development) and Linda Lehmil (IIEP)¹ showed how these mechanisms have to be adapted to specific country situations and that it is important to avoid being dogmatic. Whether transaction costs are less with these new methods is not yet clear, and needs to be further investigated.

Strategic planning seems to have made significant progress over the last two decades. Most countries

now produce planning documents, sometimes too many, and these documents are often accompanied by quantitative scenarios and cost assessments. However, new aid mechanisms, and in particular budget support methods, require good management skills in national administrations. Consequently, strengthening national capacities is still a major challenge for both developing states and their partners.

It was also noted that the information on the real costs of education systems is often incomplete and, in most countries, limited to only government expenditures. The situation has changed very little in this respect, regardless of the fact that information on costs is fundamental to any policy aiming to redistribute funds from different sources to different levels of education for different types of expenditure. ■

This article is based on the paper presented by K. M. Lewin at the IIEP 2008 Symposium, *Four decades of educational planning and finance: retrospect and prospect*, which can be downloaded at: www.iiep.unesco.org/index.php?id=653

Shifts in educational financing

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The Symposium provided an opportunity to reflect on how the main concerns in educational financing have shifted over recent decades.

¹ Iris Uyttersprot. *Financing education systems*.

Linda Lehmil. *Working towards aid effectiveness: recent policy reforms and practices in education*.

Both papers were presented at the IIEP 2008 Symposium under Theme III: *Financing education systems*, and can be downloaded at: www.iiep.unesco.org/index.php?id=653

Hungary

Assisting the transitions



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How IIEP provided the tools and educational know-how for Hungarian policy-makers during political transitions.

Miriam Jones ▲ m.jones@iiep.unesco.org

Tamas Kozma, former Director-General of the Hungarian Institute for Educational Research (HIER), presented a paper at the Symposium describing IIEP's influence among Hungarian educational policy-makers during the country's transition process, which began in the early 1970s.

With the Kádár regime in full force, the ruling party was beginning to realize that education was a significant issue. Around this time, Philip Coombs' book *World education crisis*¹ was published in Hungarian. The book contributed to IIEP's growing reputation in the country, since Coombs was the Institute's first Director. Those involved in educational policy-making in Hungary were aware that IIEP's know-how, experience and advice would prove invaluable as the country attempted to build an effective socialist community. At a time when travel to the West was restricted, IIEP was regarded as the 'treasure island' for educational planners.

Tamas Kozma studied school location planning under the guidance of Jacques Hallak and Françoise Caillods, and IIEP provided a method for collecting institutional-level empirical data on education. The data showed that regional inequalities were increasing, and that the number of pupils in vocational training was falling. This shed light on the real situation of education in the country at the time.

In 1992, Kozma was elected a member of IIEP's Governing Board. He took the opportunity to transfer IIEP research and

development methods to HIER, which, like many other institutions in the country, was until then dominated by the Soviet model. With the breakdown of the regime, HIER took on a new role as a politically-neutral body providing expertise in education. The relationship between the two institutes was further strengthened as IIEP provided an international example of this model. A forum was organized to discuss new approaches to educational planning in eastern Europe and whether, with the opening-up of the market economy, education should remain a public good or be controlled by the market.

IIEP also provided a model for co-operating with the administration without jeopardizing the identity of the ministry or experts in the field. The forms, processes and agreements taught at IIEP, Kozma affirms, have been successfully applied in Hungary. Indeed, IIEP's continuous supply of information and analysis greatly assisted eastern Europe to connect with the world in education matters.

With the expansion of the European Union, IIEP's presence in eastern Europe became less essential. However, one of IIEP's lasting messages is that government-funded or -initiated plans need to involve institutions, teachers, students, parents and local communities if changes are to be effective.

Through its training role, IIEP has offered an international atmosphere, as well as international standards and relationships, to all those who have visited regularly. It helped Hungary to solve educational dilemmas on a national level, using international methods in the midst of political change. ■

This article is based on the paper presented by Tamas Kozma at the IIEP 2008 Symposium *IIEP's contributions to the transformation in Hungary*. A personal account, which can be downloaded at: www.iiep.unesco.org/index.php?id=653

¹ Coombs, Philip H. 1968. *The world education crisis - a systems analysis*. Oxford University Press.

Fighting corruption

IIEP Summer School, Paris, 22 September-3 October 2008

Muriel Poisson ▲ m.poisson@iiep.unesco.org

IIEP's 2008 summer school was yet another resounding success. It was the first time that IIEP ran an international course on *Transparency, accountability and anti-corruption measures in education* in French. It familiarized participants with the different types of corruption in education, and the tools for diagnosing bad practice. The event also allowed them to reflect on how to improve transparency in financing, the production of textbooks, and university entrance.

With over 60 participants from 13 countries (Benin, Burkina Faso, Cameroon, Côte d'Ivoire, France, Guinea, Democratic Republic of Congo, Lebanon, Madagascar, Mauritania, Morocco, Niger and Senegal), it was one of the largest summer schools IIEP has organized. The diversity of partners made it an enriching experience, as participants benefited not only from IIEP experience and research on ethics

and corruption, but also from inputs by experts from the World Bank Institute, the Open Society Institute, OECD, Transparency International, the Council of Europe, and various French institutions.

The event also benefited from technology. National teams began preparation several months in advance through video-conferencing, and some of the discussions in the Paris sessions were broadcast to teams in seven participating countries.

Work in country teams enabled each delegation to identify specific follow-up actions for their respective countries. These included the organization of workshops, distance courses, and tracking surveys. The momentum generated will be sustained by continued networking among the participants who developed a strong community spirit. ■

See: www.unesco.org/iiep/ss2008/sschool.htm

IIEP distance education

Education sector planning

A new comprehensive one-year IIEP distance education programme on *Education sector planning* has been launched in six English-speaking African countries. It is supported by the Africa Region Education Program Development Fund of the Fast Track Initiative. The programme is carried out in co-operation with national institutions in Ethiopia, Ghana, Kenya, Malawi, Tanzania and Uganda.

The need for coherent planning, programming, budgeting and monitoring of education has grown over recent years, as efforts to achieve policy goals intensify. Available national capacities for the preparation and implementation of education development plans are still scarce, and qualified and experienced planning staff are lacking. This programme aims to reduce this 'capacity gap'.

Participants include staff from ministries of education, other governmental and non-governmental organizations involved in educational policy planning, and specialists from national training institutions. ■

Further information contact:
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IIEP is working with the UNESCO Division for Education Strategies and Capacity Building in a series of staff development courses on *Education policy analysis* in the context of international development co-operation.

Under the sponsorship of the UNESCO Education Sector's Executive Office, the courses are designed to strengthen professional know-how and practical skills for education planning methodologies and policy analysis. To date, over 100

education specialists in more than 30 UNESCO field offices have undergone the training.

Four regional courses have already been conducted. The first was held at IIEP in Paris (21 January-1 February 2008), mainly for personnel from UNESCO Headquarters. The second (5-17 May) was organized in collaboration with the UNESCO Regional Office for Education in Africa (BREDA) in Dakar, Senegal, for personnel from UNESCO field offices in French-

speaking West Africa. The third course (6-17 July), was organized at the recently-opened Regional Centre for Educational Planning (RCEP)¹ at the University of Sharjah, United Arab Emirates. It served field personnel in the Arab region. The fourth course (18-29 August) was held in Phuket, Thailand, for field offices in Asia and the Pacific region. 2008 closed with a fifth regional course at the IIEP Buenos Aires office (17-28 November) to support colleagues in Latin America. ■

UNESCO staff training in education policy analysis

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¹ See: "A regional centre for educational planning in the Arab States", *IIEP Newsletter*, Vol XXVI, No. 1, January-April 2008, p. 11, available at: www.unesco.org/iiep/eng/newsletter/2008/jane08.pdf

2008/2009

The 44th ATP begins in Paris



Participants from IIEP's 2008/09 Training Programme in Paris

Where are they now?

News of former IIEP trainees

□ Career changes

Bonaventure MEDA, Burkina Faso, (2007/08). Regional Director for the Centre-East Region (Tenkodogo).

Laura ATHIÉ, Mexico (2006/07). General Deputy Director of the National Literacy, Reading and Book Programme, National Council of Culture and Arts in Mexico.

Cidalio LEITE, Timor Leste (2005/06). Deputy Director General for Education in Timor Leste.

Boubacar NDIAYE, Senegal (2004/05). Studying Measurement and Evaluation at Laval University, Quebec, Canada.

Shailendra SIGDEL, Nepal (2003/04). Awarded the Bidhya Bhusan Prize (Great Achievers in Education) for his Masters at IIEP.

Nyakassi Jaru, The Gambia (2000/01). Governance Manager for Action Aid in The Gambia.

Benoît SOSSOU, Benin (1979/80). Director of the UNESCO Yaoundé Office responsible for activities in Cameroon, Central African Republic and Chad.

□ Deceased

Girmay BERHE TSADIK, Ethiopia (2001/02).

Subscribe to the IIEP Alumni Network at: alumni-anciens@iiep.unesco.org

David Atchoarena and Leonora MacEwen
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On 1 October, the IIEP teaching staff welcomed the 44th cohort of Advanced Training Programme (ATP) participants. This year, the 34 participants (*see photo*) come from 31 different countries in Africa (16), Asia and the Pacific (15), and Latin America and the Caribbean (3). For the first time in its history, the ATP cohort has reached gender parity with 17 men and 17 women.

After introducing the IIEP staff, the Institute's Director, Mark Bray, discussed the evolution of educational planning and management, presenting both a historical analysis and a glance towards the future of educational planning and management. Participants were then able to discuss their in-country-phase work and their objectives for the programme individually with their initial advisers.

Organized in co-operation with the French National Commission for UNESCO, the traditional two-day Orientation Seminar was held at the Natural History Museum in Paris on 2 and 3 October. The Director of the Museum, Bertrand Pierre Galey, welcomed participants and provided a guided tour of the *Grande Galerie de l'Évolution*. An occasion for participants to get to know each other, the Orientation Seminar also gave them the opportunity to discuss educational

planning and management in their respective countries. The structure and content of the ATP, its options for specialization, the thesis, and the modes of evaluation and certification were described in detail on the second day of the seminar, familiarizing participants with specific aspects of the programme.

Group discussions covered the priorities, structure, objectives and frameworks of the different education systems represented. Although most of the countries prioritize access, equity, quality and monitoring, some countries also emphasize special needs education and gender parity. It became evident that despite considerable efforts to decentralize or at least delegate management responsibilities to local levels, in most represented countries decisions and delivery mechanisms remain centralized, particularly in relation to curriculum, teacher recruitment and budget. However, many governments have adopted a participatory approach to the planning and management of education, which has important political implications both in determining priorities and implementing plans.

The diverse experiences and backgrounds of this year's ATP cohort will allow for fruitful exchange and shared learning. We wish them all a successful year at IIEP. ■

For information on all IIEP training activities:
www.iiep.unesco.org/index.php?id=73

Forthcoming activities

February

9 February-4 April 2009

2009 IIEP Visiting Trainees' Programme: Short-term training courses in educational planning and management

IIEP, Paris

- ❑ Education budgets
- ❑ Education sector programmes and projects
- ❑ Educational Management Information Systems (EMIS)
- ❑ Organization and governance of the education sector: systems and institutions
- ❑ Planning and management of human resources
- ❑ Projections and simulations: tools for policy dialogue and educational strategies
- ❑ Quantitative methods for monitoring and evaluating the quality of education
- ❑ School mapping and micro-planning

For detailed information on these courses, see:

www.iiep.unesco.org/index.php?id=77

Apply now

Contact: tepuvt@iiep.unesco.org

February-June 2009

Technical assistance to draw up the budget and evaluate the educational plan for the Ministry of Education in Panama

Panama City, Panama

Contact: info@iipe-buenosaires.org.ar

March

23-27 March 2009

Training of trainers workshop on 'Educational planning and management in a world with AIDS'

Organized in co-operation with UNESCO Regional Office for Education in Africa (BREDA)

For information: www.iiep.unesco.org/index.php?id=383

Contact: b.tournier@iiep.unesco.org

March-May 2009

Training course for officials from the Ministry of Education in Brazil

Brasilia, Brazil

Contact: info@iipe-buenosaires.org.ar

April

6-17 April 2009

Study visit of IIEP ATP participants to India

To be organized in co-operation with the Ministry of Human Resource Development, Government of India, and the National University of Educational Planning and Administration (NUEPA)

Contact: tep@iiep.unesco.org

Recruitment for 2009 training

❑ 12th IIEP-Buenos Aires Regional Training Course in Educational Policy Planning

July-November 2009

IIEP-Buenos Aires, Argentina

Deadline for applications: 30 June 2009

www.iipe-buenosaires.org.ar

Contact: cursoregional@iipe-buenosaires.org.ar

❑ 2009/2010 IIEP Advanced Training Programme in Educational Planning and Management

September 2009-June 2010

IIEP, Paris

Deadline for applications: 2 March 2009

www.iiep.unesco.org/index.php?id=77

Contact: tep@iiep.unesco.org

The 11th Regional Training Course in IIEP-Buenos Aires

The 11th session of the IIEP-Buenos Aires Regional Course in Educational Policy Planning (14 July-7 November 2008) was officially opened in Buenos Aires on 14 August 2008 by the Minister of Education for Argentina, Juan Carlos Tedesco, and the Head of IIEP-Buenos Aires, Margarita Poggi. Education experts, former course participants, representatives of several embassies, international organizations, national and provincial authorities joined the ceremony.

Margarita Poggi warmly welcomed the participants, and thanked all the institutions and people who each year provide support for IIEP-Buenos Aires' training. She highlighted the efforts of several ministries which allow the Regional Course to take place and contribute towards its improvement. Juan Carlos Tedesco emphasized the key

role that this high quality training plays in assisting professionals and education officials to face the challenges of educational expansion and improvement throughout Latin America.



IIEP-BA 11th Regional Course participants visiting Uruguay

The 11th Regional Course has 21 participants (see photo) from seven countries: Argentina, Bolivia, Brazil, Cuba, Guatemala, Honduras and Dominican Republic. They include statisticians, educational planners and managers from national, provincial and local levels, project and programme co-ordinators, and university professors. ■

For information on IIEP Buenos Aires 2008 Regional Training Course, see:

www.iipe-buenosaires.org.ar/?pagina=formacion&subpag=curso_regional_2008

Contact: cursoregional@iipe-buenosaires.org.ar

IIEP Publications

All IIEP publications can be downloaded free of charge at:
www.iiep.unesco.org/index.php?id=426

Fundamentals of Educational Planning



Double-shift schooling: design and operation for cost-effectiveness

Mark Bray
(Fundamentals No.90)
2008, 125 p.

Double-shift schooling primarily aims to extend access and minimize unit costs. However, some systems only achieve these goals at the expense of educational quality. Drawing on experiences in a wide range of countries, this booklet highlights the advantages and problems of double-shift systems. Useful to planners at all levels, it will also be valuable to head teachers and those responsible for running double-shift schools.

To order: info@iiep.unesco.org Price: 15€



Effective literacy programmes: options for policy-makers

John Oxenham
(Fundamentals No. 91)
2008, 143 p.

Despite a century of experience in running adult literacy programmes, empirical evidence on what makes the most effective strategies, teaching methods and learning materials remains scarce. This book uses what evidence there is to discuss the options that planners can consider. It looks at what can realistically be expected from a literacy project and explores the options available to policy-makers.

To order: info@iiep.unesco.org Price: 15€

Policy Forums



Accreditation and the global higher education market

Gudmund Hernes and Michaela Martin (Eds.)
2008, 284 p.

Globalization has had a profound effect on higher education systems, and has emphasized the need for a common qualification structure to deal with the emergence of cross-border providers. An IIEP Policy Forum discussed the design of accreditation systems for a global higher education market and national policy agendas to regulate cross-border providers. The Forum's papers and discussions are recorded in this book.

To order: info@iiep.unesco.org Price: 12€

Education in emergencies and reconstruction



Building back better: post-earthquake responses and educational challenges in Pakistan

Jackie Kirk
2008, 211 p.

The crucial role of education in relief after natural disasters has only recently been broadly acknowledged in international forums. Days after Pakistan's devastating 2005 earthquake, children, their families and communities began to prioritize education as a service that should be resumed quickly. This study documents how all education actors, government and non-government, were able to respond to the needs of children in the emergency. It highlights the importance of planning and co-ordination of these efforts.

To order: info@iiep.unesco.org Price: 12€

Education in the context of HIV and AIDS



Training teachers in an HIV and AIDS context: experiences from Ethiopia, Kenya, Uganda and Zambia

Charles Nzioka and Lucinda Ramos
2008, 119 p.

HIV and AIDS are a serious problem worldwide, and especially in Africa. Teachers can play a crucial role in reducing infection rates by providing preventive education for young people. The experiences summarized in this book show how the pandemic is adversely affecting teacher training colleges due to an absence of policy frameworks on HIV and AIDS, ambiguous national policies on the use of condoms, and limited mobilization of resources.

To order: info@iiep.unesco.org Price: 12€

Electronic publications

Available at:
www.iiep.unesco.org/index.php?id=426

Integrating formal and non-formal basic education: policy and practice in Uganda.
Wim Hoppers. 2008, 93 p.

Investment in Technical Vocational Education and Training (TVET) in the Philippines.
Serge Péano, Benjamin Vergel de Dios, David Atchoarena and Ursula Mendoza. 2008, 134 p.

Reviews of IIEP publications

❑ Corrupt schools, corrupt universities: what can be done?

Jacques Hallak and Muriel Poisson. 2007, 319 p. Price: 20€
<http://unesdoc.unesco.org/images/0015/001502/150259e.pdf>

"It is admirable that the UNESCO agency (IIEP) is studying corruption seriously: for far too long, it has been a topic which everyone in the development business knew about, but were too polite to discuss in public, especially in recipient countries with rampant corruption. The more that the facts of corruption are brought out into the open, the better [...]. Letting light in on the problem, as this book does, is a good start. If it encourages donor organizations to take a more robust political stance against corrupt regimes and their practices, that will be excellent. But simply to focus on improving processes will not provide the solution to the problem that this book poses."

Higher Education Review, Vol. 40, No. 2, 2008
Reviewer: Paul Temple

❑ Unequal chances to participate in adult learning: international perspectives.

Richard Desjardins, Kjell Rubenson and Marcella Milana. 2006, 128 p. (Fundamentals No. 83) Price: 15€
<http://unesdoc.unesco.org/images/0014/001488/148815e.pdf>

"Although the authors' approach appears similar to types of analyses traditionally found in studies of participation, a major strength of this work is the nuanced analyses that the authors embed in their consideration of traditional constructs. For example, their analyses point out that boundaries between job and non-job reasons for participation are increasingly blurred and that literacy (especially high levels of reading behaviour) may provide a better indicator of educational life history than educational level. [...] This book is especially recommended for individuals whose research interests are in the areas of participation and educational policy."

Adult Education Quarterly, Vol. 58, No. 2, February 2008
Reviewer: Joe F. Donaldson