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FROM THE AMERICAN PEOPLE

If

NO ONE WILL BE LEFT BEHIND:

FACING THE POLICY CHALLENGES OF INCREASING
THE QUALITY AND REACH OF EDUCATION IN
DEVELOPING NATIONS



This publication was produced for review by the United States Agency for International Development. It was prepared by Creative Associates International Inc.

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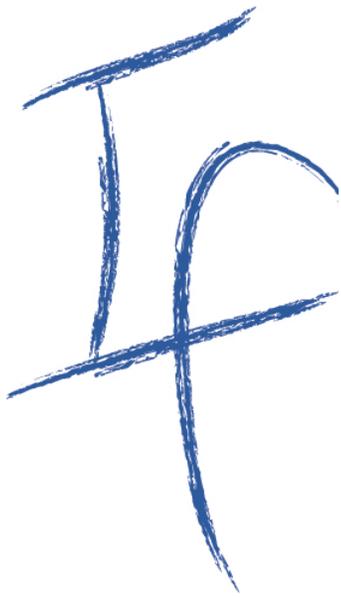
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DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development (USAID) or the United States Government.

"It is a new century and a new world of foreign assistance. The old way of looking at development is no longer adequate.

Together we need to work out our new ways of helping our development partners take on and respond to challenges."

Andrew Natsios, Administrator, USAID.

Speech to the "No One left Behind" Workshop, August 21, 2001

"All learning integrates thinking and doing. All learning is about how we interact in the world and the types of capacities that develop from our interactions. What differs is the depth of the awareness and the consequent source of action. If awareness never reaches beyond superficial events and current circumstances, actions will be reactions. If, on the other hand, we penetrate more deeply to see the larger wholes that generate "what is" and our own connection to this wholeness, the source and effectiveness of our actions can change dramatically."

Presence: Human Purpose and the Field of the Future.

Peter Senge, C. Otto Scharmer, Joseph Jaworski, Betty Sue Flowers.

Cambridge, MA.: The Society for Organizational Learning, 2004.

"Strategic management capacities are imported to enable policy implementers to deal with the challenges of policy reform. Strategic management can be thought of in terms of conceptual 'shorthand' as capacity to look outward, inward and forward."

Policy Implementation: What USAID Has Learned.

January 2001

CONTENTS

I. INTRODUCTION: SOMETHING LEFT BEHIND	3
II. LOOKING BACKWARD	7
Looking Back	7
Reflecting on a Century of Challenges	8
Education for All: The Promise of Jomtien	9
Lingering Lessons	10
III. LOOKING OUTWARD	13
Overlook	13
Nine Challenges	20
Challenge One: Basic Education and Education for All	20
Challenge Two: Economic Growth and Workforce Development	29
Challenge Three: Human Capacity Development and Training	36
Challenge Four: Capacity Development and Higher	41
Challenge Five: Education in Conflict/Crisis Situations	44
Challenge Six: HIV/AIDS and Institutional/Human Capacity Impacts	50
Challenge Seven: Abusive Child Labor	55
Challenge Eight: Information Technology	59
Challenge Nine: USAID's Global Development Alliance	65
IV. LOOKING INWARD	71
The State of Affairs	72
Developing International Development Organizations	75
Paradigms: New, Old, Lost and Found	75
Learning to Be 'Learning Organizations'	78
V. LOOKING FORWARD IF NO ONE WILL BE LEFT BEHIND	83
International Cooperation: New Paradigms, New Challenges	84
Education Reform Support (ERS)	85
Strategies for the Age of Paradox	86
IF No One Will Be Left Behind, THEN	87
ENDNOTES	91
APPENDIX: THE TEN CHALLENGES TO EFFECTIVE EMERGENCY EDUCATION	107





I. INTRODUCTION

SOMETHING LEFT BEHIND

If No One Will Be Left Behind! This is a title with a diverse and interesting history, and its evolution requires a brief explanation. To begin at the beginning, due recognition of at least a glimmer of its earliest heritage (totally unintentional) must be given to a trademarked slogan of the Children's Defense Fund, reflecting that organization's focus on and important work with disadvantaged American children. That slogan, and the overarching goal of the organization, and its founder and president, Marian Wright Edelman, was and is "Leave No Child Behind."

'No One Left Behind' was the title of an important report and book from The Twentieth Century Fund in 1996¹ on retraining America's workforce. A Task Force on this topic reached the consensus that lifelong learning, which continuously enhances the skills and knowledge of all workers, is essential if the benefits of a growing economic pie are to be shared with a larger share of the population. Workforce development also happened to be an important theme in an international workshop that serves as one source of ideas for this publication.

This publication, like its title, has come about through a process of evolution. It nominally began as a simple set of "Proceedings" for a major workshop/conference. The original intent was to reel off a litany of "who said this, who said that" as a final closure to another international gathering of experts. This was not to be.

That workshop/conference brought together USAID staff members worldwide, as well as experts from other international agencies, in Washington DC during August 2001 under the title "No One Left Behind: Increasing the Reach and Quality of Education". The main title, "No One Left Behind" came, via the change of one word, from the "No Child Left Behind" initiative of American president George W. Bush to put education in the forefront of his administration (not to be confused with the comprehensive Dodd-Miller Act to Leave No Child Behind introduced before Congress in 2001).

This publication is an exploration of and reflection on how we have proceeded (and have not), how we are proceeding now (or not), and

how to proceed in the future (and not). Unlike its predecessors, there is an element of doubt in the title. Here it is "IF No One Will Be Left Behind: Facing the Policy Challenges of Increasing the Quality and Reach of Education in Developing Nations." This is perhaps less optimistic, more realistic and more practical. "Leave No Child Behind" and "No One Left Behind" are goals. "Education for All" is also a goal. The similarity in vision and the parallel timing of these visions are important.

This is a rumination and a reflection on international educational policy and implementation that has evolved, at least in part, out of the workshop/conference noted above. It focuses, as did the workshop, on nine challenges:

- Education and Education for All
- Economic Growth and Workforce Development
- Human Capacity Development and Training
- Sector Capacity Building: Higher Education Partnerships

- Education in Conflict/Crisis Situations
- HIV/AIDS and Institutional/Human Capacity Impacts
- Abusive Child Labor
- Information Technology
- USAID's Global Development Alliance

The purpose of this document is to pull together, analyze, and reflect on these important challenges, and also to weave them together with the thoughts of other education, management, and development practitioners and philosophers who continue to shape educational policy and its implementation. Quite obviously these are not the only challenges facing development, although others are highlighted in the sections on "Looking Inward" and in the concluding thoughts on "If No One Will Be Left Behind." This document offers no blueprints to fit every development occasion or location. IF no one will be left behind, however, as the title suggests, THEN perhaps certain steps, approaches, strategies, and policies are more likely to make a positive difference. Answering these "If/Then" questions (when answers are possible) to produce profound change for the better in education is the ultimate goal here.



This exploration and reflection takes its basic structure from an educational policy paper issued by USAID² in which strategic management capacity is delineated as the conceptual 'shorthand' to look inward, outward, and forward. To this is also added the capacity to look backward; a capacity to not only acknowledge "lessons learned" but also lessons not learned and warnings not heeded, and lessons that may have been "learned" intellectually but have never been put into practice. The exploration concludes with a concise but hardly complete listing of "IF/THEN" questions and responses based on practices, lessons, and reflections.

Now is the time for proceeding, thoughtfully making use of proceedings, old and new, and more importantly, making use of the nitty-gritty of fieldwork. No One Left Behind, like Education for All, is a promise...another promise...a very big promise...to a globalized world that is so full of inequities, hardship, and a desperate need for education that is accessible and of quality. To paraphrase the American poet, Robert Frost, we have miles to go before we sleep. And we have, again and still, promises to keep.

"Development is not leaving things behind, as on a road, but drawing life from them, as from a root."

G.K. Chesterton





II. LOOKING BACKWARD

The nine challenges listed in the introduction reflect our times, our increasingly connected world, and the challenges that the world has given us, as well as challenges we have created for ourselves.

The challenges of working in international development education are much like doing a slow-motion “development dance:” two steps forward, one step back, sometimes dancing in ever tighter circles. At its best, this dance is incredibly satisfying to all, especially where educational policy hits the ground and succeeds. At its worst, it is horribly frustrating because learning the steps to this dance, adjusting to new rhythms, music, and dancers, is such a slow and difficult process.

Looking backward, briefly, on this dance, comes in four steps:

- Looking Back: remembering the challenges of early “development” 100 years ago, and before.
- Reflecting on a Century of Challenges: Reflecting on the

development challenges of the twentieth century, and how they were faced.

- Education for All: The Promise of Jomtien: Reviewing this landmark 1990 meeting of nations; promises made and progress to date.
- Lingering Lessons: Summarizing lessons learned in the area of international development education.

LOOKING BACK

Looking back 100 years there was no HIV/AIDS, as far as we know. Looking back 100 years there was abundant abusive child labor, and to some it was as appalling as it is today. It was not, however, receiving the international and organized focus as it does today, in part because of limited communications. There was relatively little recognition of the importance of education for girls and women. Looking back 100 years “information technology” consisted of chalk and blackboards, paper and pens and pencils. The typewriter was not yet

born. Looking back 100 years the book and the printed word in general were the key elements of ‘knowledge management’. In 1900 more than half the world’s people lived under colonial rule, and no country gave all of its citizens the right to vote.³ There was no Global Development Alliance, or anything like it. There was no globalization as we know it today although there were empires on the decline and some trying to be born. If there was “education in crisis situations” it was something very basic, very scattered and disconnected. There was no USAID and there was no United Nations and its agencies. There was no Asian Development Bank or World Bank. There was no Grameen Bank and there was no Integrated Pest Management (IPM). There was great poverty. A century, 100 years, is in the “Great Grand Scheme of Things” (the “GGG of T”), a very short period of time.

Looking back there was, however, interest in and to varying degrees around the world, participation in basic education. The importance of



education was known and realized many centuries before in China, in Mesopotamia, in Greece, and in Rome. Indigenous forms of basic education could be found during those same centuries around the globe. Educators and philosophers in the orient, the Americas, Africa, and Europe led the world to new discoveries, ideas and wonders. One hundred years ago, early in the twentieth century, higher education flourished and basic education was truly basic. Education has come a long way for some areas of the world in 100 years. For others, education remained a distant dream or not a dream at all, then and now. Left behind? Yes.

REFLECTING ON A CENTURY OF CHALLENGES

The twentieth century has seen much progress in development and education, and it has also seen retreat as well. While in 1900 more than half the world lived under colonialism, today some three-quarters of the world lives under democratic regimes.⁴ During the twentieth century progress on equality of gender, race, religion, ethnicity, and age was propelled by social movements, the most significant of which was the centuries-old movement for women's rights. Discrimination by gender, ethnic group, race and age, however, continues all over the world. The percentage of people with access to safe water in rural

areas of developing countries increased from 13 percent to 71 percent between 1970 and 1999, but more than a billion people in developing countries lack access to safe water yet today.⁵ From 1970 to 1998, life expectancy has increased by 10 years; from 55 to 65. In some countries of sub-Saharan Africa, however, life expectancy has actually declined sharply (e.g. Botswana) in recent years, in large part because of HIV/AIDS. Infant mortality has decreased by two-fifths from 1970 to 1998, from 110 to 64 per 1000 live births. On the other hand, by the year 2002, the world rate had declined to 56 per 1,000 live births.⁶ The United Nations World Food Programme has estimated that hunger affects 830 million people around the world; 791 million of these live in developing nations and 200 million are children under age 5 who are underweight for lack of food. In sub-Saharan Africa, 180 million people, about a third of the total population, are undernourished, with the worst-hit countries being Angola, Burundi, Sierra Leone, Guinea, Somalia, Sudan, Ethiopia and Eritrea.⁷

More than a half century ago, the Universal Declaration of Human Rights (1948) stated that education was a fundamental right. In addition, the Declaration said that all governments have a responsibility to provide free and compulsory basic education. Since 1980, illiteracy rates

have fallen by about 15 percent, but the combination of population growth and the slow progress towards universal education around the world have countered this progress. Today it is estimated that there are approximately 24 million more illiterate adults in the developing world than in 1980 (In 1998, of the 3.4 billion adults living in the developing world, approximately 870 million, or one in four, were illiterate).⁸ It is also estimated that today, in this world of global technology, 855 million people (or one in six of the world's population) are functionally illiterate.⁹

Development assistance also evolved during the twentieth century, both qualitatively and quantitatively. In 1994 it was estimated that since 1960 (in 1988 dollars) about US\$1.4 trillion had been transferred in aid from rich countries to poor ones.¹⁰ This total has continued to grow. From 1970 to 1990, the Asian Development Bank alone provided about US\$1.5 billion in loans to the education sector.¹¹

Aid, however, did not always get to the poorest of the poor. Overall, there has been an expansion of opportunities for millions of people all over the world, but clearly progress has been uneven. In 1994 Mahbub ul Haq of UNDP noted that the ten countries that were home to two-thirds of the world's poorest people received only one third of world aid.¹² Today the rich-

est fifth of the world's population receives 85 percent of total world income. The poorest fifth receives just 1.4 percent of the total income. Overall 1.5 billion people now live in absolute poverty—on less than 1 U.S. dollar per day—up from 1.2 billion in 1987.¹³ The development situation in sub-Saharan Africa presents the greatest challenge.

The manner in which development assistance has been administered has evolved as well during the twentieth century. For much of this period, that assistance has been mostly top-down and through “projects.” Historically this approach evolved out of the efforts on the reconstruction of Europe after World War II. During this period the International Bank for Reconstruction and Development—The World Bank—emphasized reconstruction rather than development. The reconstruction perspective and philosophy were carried on after the end of the Marshall Plan as attention was turned to developing countries.

The major donor organizations moved slowly towards more human development orientations during the 1960s and 1970s as it became clear that “reconstruction” approaches were not suitable for the developing world. The debt crises growing out of oil-price shocks in the 1970s, however, were particularly difficult for developing nations and led to over-lending and/or over-borrowing,

which in turn led lenders to emphasize hard “structural adjustment” for those nations. In the late 1980s the international donor community, as a whole, began to shift resources towards basic education, especially basic education for girls, as a broader view of development began to rise. “Sustainability” took on new prominence in the 1980s and 1990s. Nevertheless, the tension between economic growth and human development perspectives has continued throughout the century.

Reaction to top-down approaches of development grew in the 1960s and 1970s via NGOs and nonformal education projects, and through individuals interested in more participatory approaches to development. Rapid Rural Appraisal emerged in the 1970s in an attempt to counteract the tendencies towards “rural development tourism” and then further evolved into PRA (Participatory Rural Appraisal) in the late 1980s, using a variety of innovative, simple, and participatory tools to gain knowledge of rural areas. Local people learned how to map, observe, interview, and analyze their own areas. Nonformal education rose in popularity on these participatory trends during the 1970s and 1980s although its popularity declined in the 1990s. Bottom-up planning, empowerment, mobilization, participation and participatory approaches, accompanied by an important emphasis on governance, have firmly taken their places in the

pantheon of development tools and concepts during the past three decades. “Lessons Learned” became an important focus in development reviews by all of the major donor organizations. Those lessons, many of which will be noted here, continue to be learned.

EDUCATION FOR ALL: THE PROMISE OF JOMTIEN

To understand the challenges of international development education today, especially “Basic Education and Education for All” (the first of the nine challenges to be reviewed here), it is important to also understand the promises and agreement of the first Education for All (EFA) conference and how the promises evolved.

In 1990, 150 governments promised, at the World Conference on Education for All in Jomtien, Thailand, to act on the commitment made in the Declaration of Human Rights. They promised that by the year 2000 adult literacy rates would be cut in half and that all children would enjoy the right to a good primary education. Participants at the conference approved a Framework for Action to Meet Basic Learning Needs that delineated strategies and targets for meeting the goals of EFA. This was all not to be; the promises were broken. As noted by Oxfam, “no human right is more systemati-



cally or extensively violated by governments than the right of their citizens to a basic education.”¹⁴ This negative reaction must be balanced, however, with the realization that EFA did much to make the world aware of the importance of education in development. A global consensus was forged around the centrality of education to more sustainable human development, the advantages of educating girls and women became widely acknowledged, and there was recognition of the importance of multi-sectoral approaches to development.

Why, however, did the Education for All initiative, while making some modest gains, basically fail to keep its stated promises? The reasons are plentiful and were dissected and analyzed at the Mid-term Meeting of the International Consultative Forum (1996) and in even greater depth in preparation for the second

Education for All conference, held in Dakar, Senegal in 2000. Overly optimistic goals and expectations, lack of understanding by governments of the actual depth of the educational problems around the world, and the huge costs required to act upon the promises, international and national politics, inefficient national and international bureaucracies, emphasis on achieving quantitative access goals, and fuzzy targets and objectives all contributed to turn what had been seen as a long-term effort of mutual educational cooperation into an international embarrassment.

In one of the more cogent analyses of EFA/Jomtien, Rosa-Maria Torres (1999) has described how Education for All “shrank” after being approved (See Table 1). Given approaching deadlines and national and international pressure to produce results within given time-frames, Education for All “increasing-

ly adopted a minimalist approach and favored facile, fast, and short-term solutions.”¹⁵

Torres concluded that the expanded version of basic education described at Jomtien did not translate into the design and practice of educational policies and reforms during the 1990s.

LINGERING LESSONS

Increasing the reach and quality of education is the focus of continuing practitioner discussions, books, and papers. There is the feeling among many that this has all been heard before; that there is nothing new. Another possibility seems to loom large; that despite a past in which so many lessons have purportedly been learned, past mistakes keep recurring. There is a lesson in that itself. Progress is slow.

Table 1:
Education for All: How it Shrank

PROPOSAL	RESPONSE
1. Education for all	1. Education for children (the poorest among the poor),
2. Basic Education	2. Schooling (and primary) education.
3. Universalizing basic education.	3. Universalizing access to primary education.
4. Basic learning needs.	4. Minimum learning needs
5. Focusing on learning.	5. Enhancing and assessing school performance.
6. Expanding the vision of basic education.	6. Increasing the duration (number of years) of compulsory schooling
7. Basic education as the foundation for lifelong learning.	7. Basic education as an end in itself.
8. Enhancing the environment for learning.	8. Enhancing the school environment.
9. All countries.	9. Developing countries.
10. Responsibility of countries (government and non-governmental organizations) and the international community.	10. Responsibility of countries.

It is also difficult to know if progress is even taking place, because there is often inadequate evidence to prove that development projects have truly had an impact. There is a dire need for rigorous impact evaluations, not just 'bean-counting' of how many schools or miles of roads have been constructed. As recently pointed out, an in-house review of a variety of World Bank projects during the past four to five years found that only two percent had been properly evaluated.¹⁶ It sometimes takes a sharp kick to the institutional shins to bring about change, but a small group of development economists who founded the Poverty Action Lab at the Massachusetts Institute of Technology have advocated, and implemented, strict randomized evaluations as a way to answer the question: does aid really work? The World Bank and others are beginning to take notice of the work of the Poverty Action Lab, with the caveat that randomized evaluations are not a panacea. (For example, a development program that works in Asia may not work in Africa). An economist at the Bank when trying to explain why good evaluations were such a rarity in that institution (and this could apply to other development organizations as well), tellingly observed that "its highly trained, well-meaning professionals too often think they know the solutions. 'They have too little doubt,' he said."¹⁷

Overall, there seems to be a new movement towards better, more thorough evaluations, which in turn may produce important effects on educational policy-making. Careful tracer studies may be part of that movement. An important example, from August 2003, is the tracer study, "Where Has All the Education Gone in Africa? Employment Outcomes Among Secondary School and University Leavers" by Samer Al-Samarrai and Paul Bennell. The authors make the case that the tracer study "is a highly cost-effective way of generating information that is essential for effective, well-conceived policy-making not only for higher and secondary education, but also for vocational training, enterprise development, poverty reduction, and employment policy."¹⁸ They also believe that such surveys of school leavers should be repeated every five years "to build a comprehensive picture of the overall activity profiles of representative groups of individuals throughout their lives."¹⁹

There is indeed doubt. Maybe we know; maybe we don't. That the lessons and tested techniques of the past, often backed up by extensive practice and research, still must be brought up as good practice today gives the impression that we have not really learned so much after all. Lessons on community participation and classroom participation, girls' education, on the importance of institution building

and capacity building, and the importance of indigenous cultural and learning systems all live on and are imbued within many practitioners and policy makers. For many others these concepts and practices are either not known at all or are accepted but not practiced. "Development Inbreeding", in which practitioners and policy makers focus principally on reports and studies from their own organizations, can lead to a peculiar form of tunnel vision.

II

Sometimes it seems we have come so far in basic education and education in general, learning about learning, and sometimes it seems we have made little progress at all. In part this is because the world's educational problems and its closely linked economic problems have grown larger as the population of the world has grown. In part it is because new and major problems have arisen or have grown larger and more difficult. Sometimes the lessons of the past seem to glimmer only dimly through the struggles of the present; the lessons of the past often seem to be more intellectual exercises than field implementation. Sometimes policy seems to ignore the admonition that those working in development should keep their "eyes on the moon and their feet muddy."



III LOOKING OUTWARD

“Looking outward’, as defined here, specifically refers to the work in the outside world as it is carried on by international development organizations. Although to some this could also be defined as being “inside”, the intent here is to contrast the outer world focus on meeting development challenges with the inner operations, structures, systems, and management of those same organizations. This latter perspective is examined in “Looking Inward”.

There are two major parts to “Looking Outward”:

Overlook: a review of the major trends and forces that affect the world today, and that in turn affect efforts to increase the reach and quality of education.

Nine Challenges: a review of selected challenges in international development and education.

- Basic Education and Education for All: the first and broadest challenge.

- Capacity Development Challenges
 - Economic Growth and Workforce Development
 - Human Capacity Development and Training
 - Sector Capacity Building: Higher Education Partnerships.
- Challenges Related to Crises That Presently Affect Education and Capacity Development
 - Education in Conflict/Crisis Situations
 - HIV/AIDS and Institutional/Human Capacity Impacts
 - Abusive Child Labor
- Information Technology
- USAID’s Global Development Alliance

There are, of course, a multitude of other challenges facing developing nations and the development assis-

tance community, and the selection of these nine as illustrative of problems, progress, and prospects is in no way meant to lessen the significance of other issues, processes, and responses.

OVERLOOK

Looking outward at the state of education and development in the world forms the core of this review and reflection on how we can increase the reach and quality of education in the world, and how policies are and will be affected. The problems are complex and growing more so. The nine challenges that structure this outward view of the world reflect that complexity. The challenges rest within a world context: a context of different cultures, myriad languages, politics, and of course, economics, especially the phenomenon of globalization. It is important, however, to pause briefly before reviewing the challenges, and look out over the broader policy landscape.



EDUCATION, WORLD ECONOMICS, GLOBALIZATION

Education, for better and for worse, is intricately tied to world economics, to globalization, to “Jihad and McWorld,” and to the “Lexus and the Olive Tree”.

Benjamin Barber’s 1995 analysis of cultural and economic trends, *Jihad and McWorld*, argues that the planet is being pulled apart at the same time it is being pulled reluctantly together. What Mr. Barber calls “Jihad” is the tribalization of cultures, the pitting of people against people (It is essential to emphasize that the original meaning of “jihad” was a much broader term than ‘holy war’). “McWorld” is the integration of the globe through corporate expansion and technology. He describes these two worlds in the form of two scenarios:

“The first scenario rooted in race holds out the grim prospect of a retribalization of large swaths of humankind by war and bloodshed: a threatened balkanization of nation-states in which culture is pitted against culture, people against people, tribe against tribe, a jihad in the name of a hundred narrowly conceived faiths against every kind of interdependence, every kind of artificial social cooperation and mutuality: against technolo-

gy, against pop culture, and against integrated markets; against modernity itself as well as the future in which modernity issues.”²⁰

The events of terror that occurred in New York and Washington on September 11, 2001 are in part rooted in this scenario.

“The second (scenario) paints that future in shimmering pastels, a busy portrait of onrushing economic, technological and ecological forces that demand integration and uniformity and that mesmerize people everywhere with fast music, fast computers, and fast food—MTV, Macintosh, and MacDonald’s—pressing nations into one homogeneous global theme park, one McWorld tied together by communications, information, entertainment, and commerce.”²¹

Barber’s key point is that both scenarios make war on the nation-state and undermine the nation-state’s democratic institutions, including educational systems. Jihad violently destroys boundaries while McWorld, through a worldwide economy, has the potential to transcend boundaries, weakening the authority of states to control, for example, workplace safety or environmental regulation.²² His point, too, is that McWorld fuels Jihad; it actively promotes the imagery of

Jihad “of colorful tribalism and archaic warriorhood, as part of its sales effort.”²³ Our efforts to leave no one behind in education rest uneasily within the tension of these scenarios.

In his articulate book, *The Lexus and the Olive Tree*, (1999-2000), Thomas Friedman provides another important and more recent setting for the nine challenges to be reviewed here. The olive trees in the title

represent everything that roots us, identifies us and locates us in this world—whether it be belonging to a family, a community, a tribe, a nation, a religion or, most of all, a place called home. Olive trees are what give us the warmth of family, the joy of individuality, the intimacy of personal rituals, the depth of private relationships, as well as the confidence and security to reach out and encounter others.²⁴

In our increasingly globalized world the Lexus “represents an equally fundamental, age-old human drive—the drive for sustenance, improvement, prosperity, and modernization—as it is played out in today’s globalization system. The Lexus represents all of the burgeoning global markets, financial institutions, and computer technologies with which we pursue higher living standards today.”²⁵

Friedman acknowledges the millions of people in developing nations who “still upload for a living, not download”,²⁶ whose quest for material improvement still involves walking to a well or carrying wood on their heads for kilometers. Nevertheless, states Friedman, this does not change the fact that the global markets and high technologies are the defining economic tools of the day. The drama of the Lexus and the olive tree is playing itself out on a worldwide stage, with “information technology” a key actor. The most likely threat to our “olive trees” in today’s world is the Lexus (or McWorld): “anonymous, transnational, homogenizing, standardizing market forces and technologies that make up today’s globalizing economic system.” The Olive Tree/Lexus drama is also playing itself out with the full involvement of the important educational actors and international agencies of the world as the struggle continues to determine the directions of basic education, the roles of information technology, the nature of workforce development, and the definition and control of abusive child labor. Economics is an important perspective, but as The Lexus and the Olive Tree points out, there are other philosophies at work as well.

G-8

Education, for better and for worse, however, is intricately tied to

world economics as well as to globalization and to the world of G-8. Each year, since 1975, the heads of state of the major industrial democracies have been meeting to address important political and economic issues facing their societies and the international communities.²⁷ The first summit, held in Rambouillet, France in November 1975, brought together six countries: France, the United States, Britain, Germany, Japan, and Italy. These countries were joined by Canada in 1976 and by the European Community in 1977. The membership in G7 has been fixed since that time. Since a 1994 Naples Summit, the G7 and Russia have met as the P8 (the Political 8) following each G7 Summit. The Birmingham Summit of 1998 brought full participation by Russia and the birth of G8 (although G7 continues to function along side the formal Summits). The Summits help the international community to define new issues, to provide guidance to international organizations, and set priorities.

G7/G8 Summits have from the beginning dealt with international trade, macroeconomic issues, and relations with developing countries. Over the years the Summit agendas have been widened to include microeconomic issues such as employment and the information highway, transnational issues such as the environment, crime and drugs,

and an array of political security issues such as human rights through regional security and arms control. The 2004 Summit was held in Sea Island, Georgia, and included strong regional commitments to reform and freedom in the Broader Middle East and North Africa, and in Africa to Peace Support Operations, applying entrepreneurship to the eradication of poverty, and to the establishment of a Global HIV Vaccine Enterprise to accelerate vaccine development.²⁸

In July 2001, G8 leaders reaffirmed their commitment to help all countries meet the goals of Education for All (EFA), established in Dakar, and urged the Multilateral Development Banks to sharpen their focus on education. The G8 leaders also agreed to establish a task force of senior officials to advise on the best ways to pursue EFA goals. This gave renewed emphasis to an educational focus begun by G8 in their 1999 Summit Meeting. Their convictions were outlined that year in the “Cologne Charter: Aims and Ambitions of Lifelong Learning”. That document stressed the role of education in achieving economic success, civic responsibility, and social cohesion. It was declared that education and lifelong learning would provide individuals with a ‘passport to reality’ that they would need to adjust to the flexibility and change they



would face in the move from traditional industrialized society to the emerging knowledge society.²⁹

The G8 Education Ministers and a member of the European Commission responsible for education met for the first time in 2000 to take up this vision of "Education for a Changing Society" in more detail. Among the many conclusions of this meeting sent to the Okinawa G8 Summit in July 2000, was that

"Knowledge societies offer both significant opportunities and real risks. They require fundamental changes in learning and teaching habits, a new organization of content and structure of learning provision, and a new appreciation of learners' intellectual, emotional, and social needs. The skill levels required in the labour market are high, and all societies face the challenge of raising their educational performance. Individuals who develop and maintain high skill levels can achieve considerable social and economic success. Those who do not are at more risk than ever of marginalization with little prospect of finding sustained employment and the means that it provides for full engagement in other aspects of social and cultural life.

In this context, lifelong learning is a high priority for all. Based on the four pillars of learning to know, learning to do, learning to be and learning to live together, it provides the enhanced learning opportunities that are essential for full citizenship in the knowledge society. It is fundamental to the development of a nation.....

Education policy cannot be developed nor practice shaped in isolation. There must be consistency and connections between primary, secondary and tertiary education, resulting in true lifelong learning systems. There must be consistency and connections with other policy domains such as employment, science, technology and information and communication. There must be engagement in implementation with society as a whole and with local communities."

New strategies will best be discovered collaboratively across countries. Taking full respect of the diversity of cultures, languages and countries' education systems, the search will not be for uniformity but the outcome will be enriched by understanding the experiences of others. Collaboration will also

enhance international understanding and appreciation but it must extend beyond the G8....³⁰

Education is becoming an increasing priority in the international donor community. The subject was on the agenda of the G8 Summit in Genoa, Italy as well as the Summit of the Americas in 2001. UNESCO has convened multinational working groups on EFA, and UNICEF is implementing the United Nations Girls' Education Initiative (UNGEI). Many international agencies are scaling up their support for EFA, and the World Bank's HIPC (Heavily Indebted Poor Countries) initiative is expected to help developing countries devote more resources to education. The HIPC Initiative was approved by the IMF and The World Bank in September 1996 with the objective of reducing the debt burden of very poor countries to a sustainable level. In 1999 the initiative was broadened to produce faster and deeper debt relief and to strengthen the link between debt relief and poverty reduction.

MILLENNIUM DEVELOPMENT GOALS

In September 2000 world leaders met at a United Nations Millennium Summit and declared their commitment to end world poverty. A Millennium Declaration

Table 2:
Millennium Development Goals³¹

MILLENNIUM DEVELOPMENT GOALS ³¹	
GOALS	TARGET
GOAL 1: Eradicate extreme poverty and hunger	<i>Target 1</i> Halve, between 1990 and 2015, the proportion of people whose income is less than \$1 a day. <i>Target 2</i> Halve, between 1990 and 2015, the proportion of people who suffer from hunger.
GOAL 2: Achieve universal primary education	<i>Target 3</i> Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling.
GOAL 3: Promote gender equality and empower women	<i>Target 4</i> Eliminate gender disparity in primary and secondary education, preferably by 2005, and to all levels of education no later than 2015.
GOAL 4: Reduce child mortality	<i>Target 5</i> Reduce by two-thirds, between 1990 and 2015, the under-five mortality rate.
GOAL 5: Improve maternal health	<i>Target 6</i> Reduce by three-quarters, between 1990 and 2015, the maternal mortality rate.
GOAL 6: Combat HIV/AIDS, malaria and other diseases	<i>Target 7</i> Have halted by 2015 and begun to reverse the spread of HIV/AIDS. <i>Target 8</i> Have halted by 2015 and begun to reverse the incidence of malaria and other major diseases.
GOAL 7: Ensure environmental sustainability	<i>Target 9</i> Integrate the principles of sustainable development into country policies and programmes and reverse the loss of environmental resources. <i>Target 10</i> Halve by 2015 the proportion of people without sustainable access to safe drinking water and sanitation. <i>Target 11</i> By 2020 to have achieved a significant improvement in the lives of at least 100 million slum dwellers.
GOAL 8: Develop a global partnership for development	<i>Target 12</i> Develop further an open, rule-based, predictable, non-discriminatory trading and financial system. Includes a commitment to good governance, development, and poverty reduction--both nationally and internationally. <i>Target 13</i> Address the special needs of the least developed countries. Includes: tariff and quota-free access for least-developed countries' exports; enhanced programme of debt relief for HIPC's and cancellation of official bilateral debt; and more general ODA for countries committed to poverty reduction. <i>Target 14</i> Address the special needs of land-locked countries and small island developing States. <i>Target 15</i> Deal comprehensively with the debt problems of developing countries through national and international measures in order to make debt sustainable in the long term. <i>Target 16</i> In cooperation with developing countries, develop and implement strategies for decent and productive work for youth. <i>Target 17</i> In cooperation with pharmaceutical companies, provide access to affordable essential drugs in developing countries. <i>Target 18</i> In cooperation with the private sector, make available the benefits of new technologies, especially education and communication.



was adopted by the 189 countries at the Summit. From that declaration came a set of eight goals; the Millennium Development Goals (MDG), with associated targets (18) and indicators (48). The goals for the most part establish targets for development and poverty reduction to be accomplished by 2015 or before. The MDG, unfortunately unfamiliar to many development practitioners, are presented below, with the targets. Goal 2 specifically addresses primary education.

Recent analyses (2004) of progress in meeting the Millennium Development Goals reveal that over the past decade there has been rapid progress for some, but reversals... those that have been left behind... for an unprecedented number of other countries. There are striking regional differences as well. The Human Development Report 2004 of the United Nations Development Programme notes that the East Asia and The Pacific region is "on track" for all the goals for which data are available, with South Asia making rapid progress. Nevertheless, despite the optimism for those two areas, it is estimated that "only two of the goals, halving income poverty and halving the proportion of people without access to safe water, will be met at the pace of progress of the last decade."³² The Human Development Report 2004 pres-

ents a particularly gloomy outlook for Sub-Saharan Africa and states that "at the current pace the region will not meet the goal for universal primary education until 2129 or the goal for reducing child mortality by two-thirds until 2106—100 years away."³³ A more optimistic perspective on the effects of education in Africa, however, can be found in the results of a large-scale research study in four African countries, funded by the British government development agency, DFID. This study is described in "Challenge One" below.

USAID

Basic education is a major priority for USAID and this sharpening focus has led to special (USAID and G8) basic education initiatives in Latin America and Africa. Basic education was also elevated to a primary topic at the 2002 G8 summit in Kananaskis, Alberta, Canada. USAID has taken an increasingly visible leadership role in the global EFA initiative. USAID administrator Natsios serves on the EFA High-Level Policy Group convened by UNESCO, while USAID senior education specialists are core members of the G8 Education Task Force, the EFA Donor Working Group and the International Working Group on Education. At USAID, the Office of Education in the Bureau for Economic Growth, Agriculture and Trade (EGAT/ED)

strives to improve developing countries' pre-primary and secondary levels of education through its country Missions.

In April 2005, USAID unveiled a new education strategy, *Improving Lives Through Learning*. The strategy has two complementary objectives: (1) promoting equitable access to quality basic education, and (2) beyond basic education: enhancing knowledge and skills for productivity. Guiding principles of the strategy include allocating resources according to country need and commitment, taking a sector-wide approach, increasing efficiency, promoting sustainability, collaborating actively, and supporting education.³⁴

MILLENNIUM CHALLENGE ACCOUNT

In March 2002 President Bush announced a major new initiative entitled the Millennium Challenge Account (MCA) to provide significant assistance, through grants, to poor countries that are ruling justly, investing in people and encouraging economic freedom. In May 2004, sixteen countries were selected to participate in the MCA (Armenia, Benin, Bolivia, Cape Verde, Georgia, Ghana, Honduras, Lesotho, Madagascar, Mali, Mongolia, Mozambique, Nicaragua, Senegal, Sri Lanka and Vanuatu). The countries have been required to meet standards for good governance and

economic reform to be chosen, and they will be responsible for reaching benchmarks and goals set by the board of the Millennium Challenge Corporation, which administers the account and the grants that will flow to each country. One billion dollars was approved for the program in 2004, and funding requests will be sought for \$2.5 billion in 2005 and \$5 billion in 2006.

EDUCATION AND ECONOMICS: OTHER VIEWS

While education is seen by most donor agencies as one of the most powerful instruments for reducing poverty and inequality and for laying the foundations for sustained economic growth, it should be noted in context that a few economists do not see in their analyses the education and economic growth connection. William Easterly observes that the “dramatic educational expansion of the last four decades has been distinctly disappointing”³⁵ and that this is due to lack of incentives. If the incentives to invest in the future are not there, he says, then expanding education is worth little; “creating skills where there exists no technology to use them is not going to foster economic growth.”³⁶ That education doesn’t matter much for growth, as Easterly himself notes, is an intensely controversial finding and hints at the complexity of the education and economics context.

The case for education and for EFA, however, goes beyond economic growth arguments and this too is part of the larger context. The synergistic effects of education on other development objectives such as empowerment, protection of the environment, better health, and good governance have been documented. As Nobel Laureate Amartya Sen has emphasized, education provides people with “human capabilities;” the essential and individual power to reflect, make choices, and enjoy a better life.³⁷

II

This “overlook” upon development and development assistance would not be complete without contemplating what Nancy Birdsall and Brian Deese have called “the splintering of aid.”³⁸ As they observe, in the 1960s the United States was basically “the only game in town,” contributing two-thirds of development money. When Japan, Europe, and the oil-rich states became involved, the US commitment decreased and “today accounts for less than one-fifth of global aid spending.”³⁹ Furthermore, today, “although total real aid budgets have grown in absolute terms, they are lower as a percentage of rich countries’ total GDP than they were at their peak 35 years ago, during which time the absolute number of poor people in the world has more than doubled.”

That aid also now comes in “splinters.” “Last year, the 50-plus donor nations financed 35,000 different projects in about 150 poor countries, which means 35,000 different sets of reports and evaluations each year;”⁴⁰ leaving poor countries with limited ministry staffs struggling to manage large portfolios of varied, often unconnected donor projects. Coupled with “tying rules” (requiring recipients to procure goods and services from a donor country), this splintering of aid has produced an “aid business” which not only suffers frequent duplication but also huge inefficiencies.

Lexus, olive tree, jihad, McWorld, culture, language, participation, community, education, economics, globalization, development, splintering, tying, organizational development, management, politics, conflict, crises; all are elements at work as we strive to live up to the promises of Education for All and to leave no one behind. They, and other factors, comprise the backdrop for the true “reality show” (to use the metaphor from the unreal world of American TV) of international development and for the nine challenges described below.



NINE CHALLENGES

CHALLENGE ONE: BASIC EDUCATION AND EDUCATION FOR ALL

THE CHALLENGE IN CONTEXT

In Looking Backward, it has been noted that the Education for All (EFA) effort at Jomtien suffered mightily from expectations that were too high, funding that was too low, coordination that was too feeble, and promises not kept. The new Education for All initiative agreed upon in Dakar, Senegal in 2000 raises new hopes, new expectations, and new doubts. As acknowledged by USAID Administrator Andrew Natsios in 2001, there is good news and bad news.

“The good news is that more people can read and write and more people are going to school than at any time in history. In the last decade net enrollment in the least developed countries increased by 81 million students. The bad news is that we live in a world where a billion children and adults are still illiterate. Girls are still denied access to education. Around 113 million children are not in school. Too many of them are working for a living and too many of them face abusive labor conditions and even slavery.”⁴¹

Mr. Natsios acknowledged too that his agency must do more and is doing more. He noted that the United States was one of 160 countries working toward the EFA goals of quality universal primary education and gender equality. By their commitment to EFA, those 160 countries have made basic education of interest to international development professionals and educators around the world.

What actually seems to be successful in basic education? Reviewing “best practices” can be helpful. Three common themes are inherent in the best practice examples presented here: quality, equity, and access.

CRITICAL ISSUES

Today, EFA is an important focus for basic education. The reasons for the rising interest in basic education may include the foundations of interest built during the first decade of EFA as well as slow and measured improvements in advocacy. EFA provides an opportunity for a single point of contact on educational issues (‘one stop shopping’) and allows all players to focus on one issue. EFA is a major entry point for the many countries that have signed the agreement in Dakar. There are problems surrounding EFA including its feasibility, its finance, and the role of NGOs/PVOs without which the goals cannot be achieved. It does, however, provide a unique oppor-

tunity, as it has a domestic and international consensus.

One effort to better delineate the issues of basic education in the wake of EFA was conducted in a study during the USAID-supported Basic Education Policy Support (BEPS) Activity. Researchers looked at four areas: what is deemed important, what are causes of these issues or problems, what are the strategies that could be employed to focus on these issues, and what are the roles of USAID and its partners. The salient issues that emerged from the study, through 40 interviews with a wide range of educators, development thinkers and practitioners, can be summarized as:

- How does global change affect education—in terms of geopolitical, economic, environment, health, and information technology.
- What should be included in knowledge—Whose knowledge? How is culture incorporated into knowledge? Is education a set body of knowledge or a way of thinking?
- What do children need—to relate to what they have in their own lives, to learn how to be critical members of society, to continue life-long learning, to learn self-respect and respect for one another

and to be prepared for their current living situation and beyond?

- Where do we invest in education—alternative/nonformal? community-based? government supported?

Five other issues also deserve special attention here:

- Can we agree on ONE definition of basic education?
- Advantages/Disadvantages of Decentralization.
- The Political Will of Governments.

- Are education programs losing an opportunity by working too much in education? (as opposed to democracy and governance, ethics, conflict prevention)?
- How can pilot projects be effective when most host governments can't afford to apply the lessons learned?⁴²

DEFINING BASIC EDUCATION

Agreeing on one definition of basic education, or more accurately what is subsumed under basic education, remains difficult. That there is lack of clarity among development

practitioners on a definition reflects in part the difficulties in getting governments interested in funding basic education internationally. The United States government has increased its spending on international basic education, which the US Congress defines as including: pre-primary, primary, secondary, teacher training at the formal level, and adult literacy (although because of "child survival" restrictions on USAID, work hasn't been taking place in the last area).

It is important to pause here and emphasize that the definition difficulties surrounding basic education

Table 3
Basic Education⁴³

RESTRICTED VISION (Conventional)	EXPANDED VISION (Education for All)
Focused on teaching.	Focused on learning.
Directed at children.	Directed at children, youth and adults.
Takes place within schools.	Takes place inside and outside schools.
Restricted to a period in a person's life.	Lifelong and begins at birth.
Equates with primary education or a pre-established level of education.	Is not measured by the number of years of study or certificates attained, but by what has been effectively been learned.
Responds to the teaching of specific subjects.	Responds to the satisfaction of basic learning needs.
Recognizes only one type of knowledge as valid; that acquired in the school system.	Recognizes the validity of all types of knowledge, including traditional knowledge.
Is uniform for all.	Is diversified (basic learning needs are different in different groups and cultures, as are the means and modalities to meet these needs).
Is static ("change" takes the form of periodic school and curriculum reforms).	Is dynamic and changes with the passage of time (educational reform is permanent).
Supply (institution, school system and administration) predominates in the definition of content and methods.	Demand (students, family, social demands) predominates in the definition of content and methods.
Responsibility of Education Ministry (education as a sector and a sectoral responsibility).	Involves all ministries and government bodies in charge of educational actions (requires multisectoral policies).
Responsibility of the state.	Responsibility of the state and the whole society, thus demanding consensus-building and coordination of actions.



are complex. Some of these problems have been alluded to previously in the description by Torres of how Education for All was “shrunk” after Jomtien in 1990. There are philosophically fundamental issues involved in the definitional disputes, particularly in terms of those related to whether there is to be a “teaching” or a “learning” focus in basic education. These differences in vision are best summarized in Table 2 by Corragio and Torres (1997). Note that the expanded vision refers to Education for All as initially propounded in Jomtien. The teaching and learning foci are specifically highlighted for this publication.

SUSTAINABILITY, FLEXIBILITY, INTEGRATION, AND POLITICAL WILL

International educators continue to address the questions of why there is still a focus on pilot projects when governments can't afford to apply lessons learned, and whether or not education projects are losing opportunities by working too much purely in education. Flexibility is a key word for many educators; flexibility was and is seen as necessary in programming and should be based on country-specific circumstances.

Development should be regarded as integrated, not compartmental. Partnerships, alliances, and intersectoral thinking are seen as important as are realistic expectations, longer-term commitments, and the need

to take greater risks. Although hardly “new news,” there have been repeated calls (such as already noted from Birdsall and Deese) for increased donor coordination. In a plea that applies to all donor agencies and the Education for All efforts, “bureaucracy needs to match the rhetoric.” Funding needs to match the rhetoric as well. There has to be the political will, nationally and internationally, to tackle educational issues. Despite recent absolute increases in development funding, the realities of funding EFA are captured dramatically in this request to “do the math”:⁴⁴

DO THE MATH!

I 13 million kids are out of school. Even if it only costs \$50 a kid, which is actually realistic, the Education for All initiative is a 6 billion dollar activity just for recurring costs, not even including building schools, training teachers etc. We only have 150 million dollars to attack a problem that is 40 times larger than that!

**David Evans
Global Bureau, USAID
2001**

Additional critical issues and challenges surface when considering related topics such as educational data needs, the disabled, building partnerships, and language literacy needs. A brief summary of those issues follows:

PARTNERSHIPS

There is a multitude of different partner types, and the values and principles underlying each of them vary. Business partners collaborate for mutual benefit/profit.

Management relationships, for example among donor agencies, may focus on mutually beneficial collaborations to improve organizational efficiency and effectiveness, and to maximize the use of economic and technical resources. Technical assistance/capacity building partners focus on the transfer of knowledge and skills by combining related talents. There are also implementation partners, and communities of practice (which focus on information sharing).

There are functional distinctions among partnerships as well. “Partnerships of equals” are those

in which stakeholders all have equal footing and responsibilities. “Differentiated partnerships” are those in which there are complementary roles and responsibilities. There are truly unequal, and usually troubled, partnerships, in which stakeholders neither have equal nor complementary roles and responsibilities.

As donor agencies and other institutions increasingly look toward partnerships as a way to focus

financial and human energies, the challenges of implementing successful partnerships become even more important.

RELIABLE DATA

“Doing the math” becomes even more difficult when one realizes there is considerable difficulty in obtaining reliable data on education around the world. Prior to 1994, UNESCO was the only organization that did anything remotely connected to educational data studies but the reliability of the data was and remains less than desirable. One proposed solution to this lack of reliable data may be found in the DHS EdData project.⁴⁵ USAID is the main financial supporter of DHS EdData in cooperation with the AFR/SD Bureau within the Office of Sustainable Development. This new effort goes into greater depth to achieve improved accuracy, and data gathering and analysis activities to date have occurred in Guinea, Egypt, Uganda (2000) and are now occurring in Malawi and Zambia.

LANGUAGE OF INSTRUCTION

An important and emerging issue requiring much more attention, research and funding is Language of Instruction (LOI). This is an issue that crosses many boundaries in development. It is estimated that 6 billion people in the world speak roughly 6 thousand languages, 96 percent of the people speak 4 percent of the languages, while the

remaining 4 percent of the world’s population comprise 43 percent of the illiterate people in the world today.⁴⁶ Problems of language of instruction occur when language policies are sidelined in relation to mainstream education reform. This serves to reinforce the educational marginalization of a host of ethnic groups. Many development projects seek to widen the access and quality of education, but few directly address the fact that many children come into school not fully understanding the language in which the class is administered.

INCLUDING THE DISABLED

Development, by definition, is supposed to focus on the most vulnerable populations. If that’s the case, we have not always done a stellar job at reaching the disabled, certainly among the most vulnerable. Lack of funding and the failure to provide incentives to USAID Missions to incorporate the disabled in their programs were cited as two reasons for slow progress, although, for example, an assessment study of the educational needs of the disabled in Bangladesh, funded by USAID, was implemented during

The only education available to most indigenous language groups, especially in the poorer countries of the world, is in a language they neither speak nor understand. The consequences of this kind of education are predictable. For the learners it means high attrition rates and often relapse into semi-literacy or illiteracy.

Susan Malone
SIL International Paper
When ‘Education for All’
Includes Everyone

The Human Development Report 2004, with its overall theme of “Cultural Liberty in Today’s Diverse World”, emphasizes that challenges are greatest where linguistic diversity is greatest and notes that in more than 30 countries of Sub-Saharan Africa, “—with 518 million people, 80 percent of the region’s total—the official language is different from the one most commonly used. Only 13 percent of the children who receive primary education do so in their mother tongue.”⁴⁷

January/February 2005.⁴⁸ This complemented an ongoing program for the disabled in Bangladesh through Save the Children. Several programs are examples of Best Practices. These programs are the Victims of Torture program, that was allotted \$10 million in 2001; the Patrick J. Leahy War Victims Fund that supports strengthening of humanitarian service delivery systems; and the Displaced Children and Orphan Fund that allotted \$13 million to Vietnam for



a model program of children's activities, including mainstreaming of Persons With Disabilities (PWD), developing an indigenous sign language, and vocational training.⁴⁹

The challenge is in developing greater outreach, networks, and alliances and providing a firm strategy for inclusion.

QUALITY, EQUITY, AND ACCESS

Although stated as distinct challenges to basic education, it is quite evident that quality, equity, and access are integrally interwoven. Emphasis on one directly impacts the other. Therefore, a critical concern surfaces when a heavy stress on "access" may be muting or sabotaging the need to provide education of "quality". The quality/access issue is a serious one and lurks in past and continuing efforts to show that seats are filled in primary schools—a numbers game—to show that Education for All is being achieved.

Fernando Reimers, in his book, *Unequal Schools, Unequal Chances*, looks closely at the equality of educational opportunity in the Americas, and bluntly concludes that "no", such equality does not exist. His focus is on equity and access and he calls for approaches and policies that view educational opportunity as a "cumulative process" with the need for long-term strategies.⁵⁰ He also observes that "addressing the

learning conditions facing poor children is not enough; we need to focus on the distance between the conditions facing the poor and those facing the non-poor. The objective of policy should be to close that distance." Reimers does note, in a policy and implementation framework focusing on equity, that "access and quality become inextricably linked as one moves up the education ladder"⁵¹ and that "access to secondary education is possible only upon completion of primary education, which is possible only upon a strong foundation of early learning, all of which requires quality teaching."⁵² Clearly "quality" is of profound importance in basic education and ignoring it in a rush to leave no one behind leaves us all behind.

BEST PRACTICES

Qualities that have been identified as necessary to ensure successful development interventions and seem to be inherent in activities of 'best practice' are ownership, facilitation, participation, empowerment, being community-based, and involvement. There are many examples of best practice; only five of these are presented here.

The Falconbridge Foundation's School Sponsorship Program embodies all six of the identified best practice qualities. The Falconbridge Foundation is an NGO founded in 1989 in the Dominican Republic by the

Canadian mining firm Falconbridge, LTD for the purpose of improving its relationship with the communities around the mines. The decision by the Board and staff of the Foundation to focus on education came from their belief that "education and improvements in local schools are the key underlying factors in the poverty of the communities and the key to long-term community development, improved housing, jobs, and health."⁵³ In order to find an effective model for participation of the private sector in public education, and to support the national efforts for basic education reform, the Foundation created the School Sponsorship Program.

For more than a decade the Falconbridge Foundation has been supporting public elementary schools in two provinces in order to improve the school environment and the quality of education. The Programa de Apadrinamiento de Escuelas is built on local community involvement and responsibility, with a view towards long-term community development. "It is a successful, enduring example of a public/private partnership in support of traditional public education, with clear benefits to the private firm, the school system, and the local communities."⁵⁴

The Falconbridge Foundation is fully funded by the mining company with the addition of several small

grants from USAID. The Foundation's School Sponsorship Program reaches about 100 public primary schools (including urban, peri-urban, and rural) staffed and built by the Ministry of Education, reaching about 74,000 students and 1,600 teachers. The Program goal is to promote sustainable community development through a viable model for private sector involvement in education. The program only supports reform of the Ministry of Education and its schools. It focuses on the quality of education and the development and strengthening of the school community. The Foundation's commitment to the schools is long term.

Several key characteristics define the Foundation's school sponsorship model:

- “The Foundation sponsors existing public schools. The school faculties are appointed and paid for by the Ministry, and the schools are built by the government. The Foundation funds only school repairs and furnishings.
- The program is implemented at the local level in partnership with the local school community, including the school director (the principal), and teachers, the parents, and the students. The Foundation does not have a fixed agenda

for school sponsorship. It responds to requests from the schools on an individual basis. It does not lobby for policy change at the national level.

- The program is built around implementation of the government's Ten Year Plan for Education and the new Education Law passed in 1997. The standards for infrastructure improvements and for quality of education are those of the public education system as reflected in the legislation.”⁵⁵

The sponsorship process begins with a written solicitation from the school parents association and the school director, followed by a meeting to discuss the responsibilities of each party—ownership and facilitation. The Foundation doesn't initiate any of the activities. The emphasis is on the community's participation. The school children's parents are involved in maintaining the school building, furniture, and facilities and are responsible for soliciting the Foundation and other sources for necessary funds—participation and community-based. Student councils are also very involved in the process. They go through an election process, learning how participatory management and democracy work and they assist the school director with the implementation of the Sponsorship

Program— involvement and empowerment.

A set of important recommendations for replicating similar public/private partnerships in education has evolved from the Falconbridge experience:⁵⁶

- Start slowly and with small goals in mind. The initial focus must be on a successful start-up, doing everything possible to ensure early success. That may mean a long planning period that begins with a convocatory period, selection of a board, and selection of an executive director.
- Engage in trust-building exercises among the partners.
- Begin with the consciousness raising process among business from the outset.
- Provide participating businesses with information on outcomes in the sponsored schools.
- Provide business sponsors opportunities for benefits in the short run.
- Use the board (of the foundation) as a recruitment strategy for schools.
- Offer an integrated package to business sponsors. This offers the firms an opportunity to invest in a local develop-



ment project that has both long and short-term benefits.

- Work with the Ministry of Education to channel information about achieving improvements into the public system. Tangible advantages can be presented to the Ministry:
 - by showing real improvement in some public schools through the sponsorship program. The Ministry can take credit for instituting a program that has positive results.
 - by the school sponsorship program producing positive lessons that the ministry can incorporate into its own practices.
 - by provision of teacher training. Some of the teacher training programs run by the school sponsorship program may have excess capacity, in which case teachers from nearby schools could be invited to participate.
 - by developing relationships with NGOs for the provision of training and evaluation services.

The Falconbridge program offers an important vision of how ownership, facilitation, partnership, empowerment, and community

involvement can result in a sustainable, quality, basic education program.

II

The Integrated Pest Management (IPM) movement is a revolution that has been taking place across South and Southeast Asia that focuses on the learning experience. It allows farmers, especially women and girls, to become better managers, reduce dependence on chemicals, increase production and income, safeguard their health and protect the environment. The IPM programs strive to support community ownership, empower the farmers to make their own wise decisions and facilitate the participation of the farmers in their own learning process.

The IPM program includes four types of schools:

- Farmer Field Schools for Women: incorporates the development of a gender analysis matrix in addition to rice crop decision-making to generate discussion on important topics. These schools also link Farmer Field Schools to livelihood improvement and to savings and credit groups.
- Student Field Schools: using IPM methods, these schools provide children with education relevant to their surroundings.

- Farmer Life Schools: these schools are for graduates of Farmer Field Schools and are operated by the farmers themselves.
- Field Schools for Out-of-school Girls: these schools are meant to introduce out-of-school girls to sustainable farming practices and broad environmental issues as covered in the Student Field Schools.

IPM does not involve extension agents but rather is conducted through farmer-to-farmer training. Importantly, the IPM program is equipping women and girls in rural areas with skills that help them make informed decisions about agricultural practices that are more productive and environmentally sustainable. Using a discovery-learning approach, the IPM program is being implemented in Indonesia, the Philippines, Cambodia and Nepal. With collaboration of NGOs a major component, the IPM programs are in the process of becoming “community IPMs”; continuing to mobilize resources at the local level, fostering sustainability, and reducing the costs that incur in government-run IPM programs.

The IPM programs are not “business as usual” agricultural extension programs. In part because they are out of the ordinary, they face a variety of challenges. These chal-

Challenges include sustainability issues, accommodating programs to varying literacy levels, funding issues, collaboration with government agencies, and attitudinal issues surrounding women's roles in decision-making. Despite the challenges, the IPM programs continue to accumulate and expand upon their successful experiences.

II

In Honduras, Educatodos is a fast-track to the 9th grade. Utilizing a multi-faceted education delivery system that includes learning materials, radio, volunteer facilitators, field personnel, and evaluation. Educatodos has 315,000 student participants and is reaching more and more children in an attempt to leave no one behind. Those left out are the main target populations of its program. Educatodos is a holistic program that works through municipalities, religious organizations, private enterprise, government agencies, vocational centers, and NGOs. The Educatodos program begins with a set of assumptions of what the program can do to achieve 70 percent enrollment in grades 7-9 by 2015. These include facilitating:

- technical and management capacity
- sufficient and regular funding
- volunteerism of facilitators
- partnerships with civil society

- good relations with teachers
- youth wanting to continue studies, and
- political will.

In addition, Educatodos promotes testing to support learning that includes skills evaluated in context, self-evaluation, continuous evaluation, and evaluation for certification. Educatodos recognizes that youth are key resources for development and that a good education leads to

- improved living conditions
- readiness for work
- increased employment
- less vulnerability and risk
- higher income, and
- healthier and better educated children and smaller families.

II

The Learning from Classroom Inquiry Project in Malawi was a collaborative effort with Virginia Tech, Malawi Institute of Education, and Domasi College of Education to develop school-based capacity problem solving sites in three locations throughout the country. A series of activities took place to facilitate the achievement of this effort. The first activity was to study the cultural context of teaching and learning in each of the selected schools, "with emphasis on

the quality, efficiency, and access to basic education for girls." This was accomplished by examining the perspectives of teachers on teaching and learning, studying the teaching and learning process in the three schools, identifying educational needs of teachers, describing how staff development gets put into practice in the schools, and examining teachers' perspectives of student needs.

The second activity was for each head teacher to select a Site Team of five to ten teachers. This was followed by extensive classroom observations at each school site to determine how teachers interact with students, how students respond to the teachers, how students react to each other, how materials are managed, what is the role of materials in the classroom, what is the nature of tasks that students do, and evidence that examples from previous training workshops and in-service programs were used.

A monograph was written to present the findings and analyses of the classroom observations. This monograph provided the framework for seminars focused on helping teachers implement an inquiry-based approach to enhancing teaching and learning in their classroom. Site team members were asked to keep journals of their thoughts about teaching and learning. They were asked to think and



write about the following questions:

- What could you do to make learning better for your students?
- What could the school do to make learning better for your students?
- What kind of community activities would make learning better for your students?

The journals, along with information gained from further observation visits, were used in a four-day Teaching and Learning Seminar for all three site teams. The Seminar provided a forum for case analysis and identification of teaching and learning issues from the collective set of journals. Seminar participants then wrote and shared teaching stories, wrote collaboratively for various chapters in a teaching and learning handbook, and drafted preliminary plans for a school-based professional development model for each school.

As in the previous three examples, this Malawi project provides examples of qualities that exemplify “best practices”—facilitation, participation, empowerment, ownership, and involvement. As stated in project reports, “the work of the project has focused on teachers studying their own classrooms and the problems they identify, i.e., teachers are assuming “ownership” of their work and learning more about

their work. It is the ownership of the process that is critical for sustaining the classroom inquiry in which the problem-solving teacher development model is embedded.”

II

The Education for Development and Democracy Initiative (EDDI), which officially came to a close in 2003 but whose character and efforts live on within a larger USAID effort, was an innovative mechanism designed to support activities with the potential to become such examples. “EDDI (was) an African-led development program with special emphasis on girls and women, concentrating on improving the quality and access to education, enhancing the availability of technology, and increasing citizen participation in government to accelerate Africa’s integration into the world community of free-market democracies. In addition to governance projects, it promoted sustainable partnerships among African education and democracy organizations and between them and their sister organizations in the United States to educate children, involve communities, implement new business modes, and extend quality educational services.” Participation, being community-based, and involvement were all intentional requirements of an EDDI initiative and were all essential components for activities of “best practice.”

II

IF the opportunities and resources are provided, THEN basic education transforms. It transforms people and their capabilities, not just in terms of direct economic possibilities, but also in reading, communicating, arguing, in being able to choose in a more informed way, in being taken seriously by others, in overall self-fulfillment. Basic education transforms the extent to which people have the opportunity to achieve outcomes that they value and have reason to value. That this transformative capability is not always understood nearly as well as it should be both nationally and internationally is a challenge in itself. That so much has been learned and gained is admirable. That so much yet needs to be reformed before the basic education transformation gains the “traction” required to truly leave no one behind to make a greater difference...is challenging and essential.

CHALLENGE TWO: ECONOMIC GROWTH AND WORKFORCE DEVELOPMENT

THE CHALLENGE IN CONTEXT

Among the many reflections that have occurred since the attacks of September 11, 2001 have been the renewed realizations that the world is highly interconnected and that attention to the world's poor must be high on the economic agenda. Although there was great optimism twenty years ago, the record of the rich nations in raising the developing world to a minimal level of well-being has not been a shining one. "In 1983, The World Bank predicted that developing nations' average gross domestic product would grow 3.3 percent a year over 15 years. In fact it barely grew at all."⁵⁷ Poverty remains shocking and about a third of the world lives on the equivalent of \$2.00 per day. "In 1820, the richest country had only three times as much income per person as the poorest; today, the richest nation has 20 times the income."⁵⁸

"Economic growth" is an important economic and philosophical approach to meeting the world poverty challenge, but economists have long been divided about what drives "growth". In the 1980s, The World Bank advocated that countries to which it lent funds adopt such reforms as free trade in order to bolster competition, deregula-

tion in order to spur free markets to allocate resources, and restrained government spending to control inflation. The rate of success of these policies has been called poor; although from one point of view this was mostly because the Bank lent money whether the reforms were instituted or not. When nations adopted the reforms, this view maintains, the nations did fairly well.⁵⁹ Critics of the emphasis on market policies to stimulate economic growth, such as Joseph Stiglitz, former Chief Economist at the World Bank, suggest that economic growth is affected by a wide array of factors including education and the quality of financial institutions. The philo-

sophical divide also slides over into workforce development with the debate, to be noted later, over the differing development emphases on 'livelihoods' and 'jobs'.

From a global perspective, clearly millions are currently being left behind and left out of the world's workforce. One situational analysis of the workforce situation delineates the breadth and the depth of this challenge (or more accurately a crisis).

Another analysis offers hope. An international research project in 2001,⁶¹ using the tracer study methodology noted previously, has evaluated the further education and employment experiences of

THE WORKFORCE SITUATION

- **Nearly 150 million people in the world today are unemployed.**
- **a billion (roughly 30 percent of the world's labor force) are unemployed or have such low level jobs that they cannot support themselves or their families.**
- **3 billion people try to survive on two dollars a day.**
- **About 1 billion young people are in some form of school in today, or they should be in school, about to enter the labor market at unprecedented rates between and 2015. Right behind them; another 1.5 billion youth.**
- **Only 10 percent of these youth will live in countries where there are jobs for them (at the present time).**
- **All of these (youth) challenge the capacities of the educational systems of developing countries, already bursting at the seams, unable to cope.**
- **How will they earn their livelihoods?⁶⁰**



secondary school leavers and university graduates in four African countries: Malawi, Tanzania, Uganda, and Zimbabwe. Over 5,000 graduates and school leavers were interviewed. The university sample was drawn from graduates in a variety of occupational areas who left their national universities in 1980, 1987, 1994, and 1999. A representative sample of Form Four school leavers in 1990 and 1995 were also traced.

The study showed that despite increasing concerns about unemployment among university graduates in much of sub-Saharan Africa, nearly all the sampled university graduates in the four survey countries were in training—related wage employment in late 2001. Only between one and three percent of the university graduates were unemployed and looking for work. The incidence of wage employment among the 1990 school leavers, however, was much lower, with only half in wage employment in Zimbabwe, Uganda, and Tanzania. The figure was over 80 percent in Malawi. It was also estimated that between 10 and 38 percent of the terminal school leavers were in full-time self-employment in mid-late 2001.⁶²

The researchers concluded that the employment outcomes were better than expected but that there are still “enormous challenges of

educating and utilizing secondary school leavers and university graduates in an efficient and effective manner in low-income African countries.” They cautioned that “given the paucity of new employment opportunities in the formal sector, much more needs to be done in order to ensure that both of these groups are better prepared for productive self-employment, especially in high-growth and higher skill activities.” Importantly for the future direction of efforts in education, the researchers also concluded “that improving the overall quality of higher and secondary education is also absolutely crucial.”⁶³

A nation can be directly measured by the current prospects of its youth.

John F. Kennedy

The global challenge of the workforce crisis is both a threat and an opportunity.

The threat is complex and multi-fold. It is, as described earlier, both Jihad vs McWorld (Barber) and The Lexus and the Olive Tree (Friedman). The elements of the threat, whose foundation is poverty, are reflected in the unrest at world economic and trade forums, and include:

- the policymakers’ decreasing power to control what hap-

pens inside their borders in terms of information, capital and technology;

- the kinds of economies that are wanted;
- who gets to participate in the new economies; and
- who benefits and who bears the costs.

Poverty is also linked closely with social and political unrest, genocide, environmental degradation, discrimination against women, and decreasing levels of health. Wars in turn are being transformed from superpower confrontations to local community wars⁶⁴ or terrorist attacks where a “victory” response is nebulous and long-term.

The opportunity comes with the dramatic pace of the changes in the world today—costs of communication are dropping rapidly, political borders are disappearing, and economies are becoming increasingly interdependent. Capital, technology, and information flow freely in an out of national boundaries. This puts “unique pressures on developing nations, while simultaneously creating vast opportunities to realize higher levels of prosperity for their citizens if they can find ways that help their citizens participate in productive economic activity;”⁶⁵ in essence, workforce development.

Workforce development is therefore a key part of the response to the economic challenge and, before proceeding to review it in practice, it is important to clearly understand what is meant by the term. A strategic definition of workforce development is “developing the skills of a nation’s citizenry through a process of lifelong learning at work, in schools and community-based settings; a process that helps people with skills that allow them to earn livelihoods in local, regional and global markets.”⁶⁶

CRITICAL ISSUES

Meeting the challenge of economic growth and workforce development continues to be difficult. The situation has been likened to moving from “Teflon to Velcro.” The benefits of the unimpeded flow of capital, information and technology are slipping away from those without capacity and therefore a goal is to adapt quickly to help the benefits hold fast within each country.⁶⁷

A variety of critical issues therefore face economic growth and workforce development initiatives. These include:

- how to fulfill a set of prerequisites or needs that lead to competitive success;
- how to address a basic set of “disconnects” in developing nations;
- how to most accurately view

the world of economic development: through “jobs” or “livelihoods;” and

- for USAID, how to achieve a set of “breakthroughs” in overcoming obstacles to workforce development;

Responding to the globalization phenomenon will require initiating pressure internationally for the adoption of certain common standards in the workplace, the development of standards for those who will be competitively trained, and the adoption of competitive local standards. If a goal is to contribute to competitiveness through workforce development as measured by productivity and increased employment and employability, then there will be a need for:

- a more transparent and flexible labor market, with clear market signals and greater ability to respond to global industry trends;
- more portable skills through certification systems;
- greater efficiency in skills acquisition;
- more variety in training solutions;
- institutionalized articulation of competitive workforce needs by industry and training providers.⁶⁸

ADDRESSING THE DISCONNECTS

In order to fulfill these needs a number of basic “disconnects” on the demand and supply sides as well as the linking mechanisms between them have to be addressed. Table 4 delineates these disconnects and responses.

BREAKTHROUGHS

For USAID, there is a need for “breakthroughs” to overcome the workforce development obstacles. Suggestions include:

- Holistic approaches that are adopted to respond to issues at both the top and the grass-roots levels;
- Missions that should have more flexible money, not earmarked;
- Involvement of all stakeholders;
- Public works programs created that in turn create jobs;
- A long-term instead of a short-term view of workforce development.

LIVELIHOODS

Finally, it is important to note here, and briefly deal with, an issue that is critical because it focuses on a key word appearing repeatedly in the strategies and the initiatives on workforce development. That word is livelihood. It is not a word to be taken in passing or lightly since con-



Table 4
Workforce Developments: Disconnects and Responses⁶⁹

DISCONNECTS	POTENTIAL RESPONSES/STRATEGIES
<p>The Demand Side</p> <ul style="list-style-type: none"> ● Poor articulation of demand ● Low level of investment in training ● Organizations and individuals turned off with traditional education and training. <p>The Supply Side</p> <ul style="list-style-type: none"> ● Lack of responsiveness to needs of industry ● Lack of experiential training ● Poor understanding of industry needs ● Limited number and diversity of training solutions. <p>Linking Mechanisms</p> <ul style="list-style-type: none"> ● Poor bridges between industry and education/training providers ● Lack of industry-led initiatives on standards and certification systems 	<p>The Demand Side</p> <ul style="list-style-type: none"> ● Demand assessments ● Competency requirements ● Recruitment ● Retention ● Performance measurement ● Learning systems and knowledge management <p>The Supply Side</p> <ul style="list-style-type: none"> ● Experiential learning ● Diversity of off-the-shelf and customized training solutions ● Curriculum review committees. ● Consultancy mechanisms for faculty. <p>Linking Mechanisms</p> <ul style="list-style-type: none"> ● Industry demand assessments ● Job forecasts ● Salary surveys ● Job placement programs and clearinghouses ● Trainer rankings

siderable effort has gone into its increased use in a more meaningful way over the past decade.

Why is the word livelihood significant to workforce development, and why is it even discussed here? Basically, it is because livelihood and job are signal words; words that signal two major viewpoints on development. Understanding what these two words signal is crucial to understanding development as measured by principally economic criteria or by a wider humanistic set of characteristics. It is the difference between measuring development through hard World Bank economic indicators or by the broader soft indicators of UNDP's Human Development Reports.

The concept of sustainable livelihoods has been used extensively in international organizations, particularly in the United Nations system, to help provide a philosophical contrast to what often is implied in discussions of workforce development: the "job". This is not playing with semantics but, like the morphing of sustainable development into sustainable growth, simply points up some fundamental differences in the nature of development (hard vs. soft) that must at least be acknowledged.

It is important to acknowledge that the concept of job has emerged as a central element in human resources/human capacities strategies and policies. Education systems are expected to be able to prepare

people for jobs, individuals are to make job choices, and media (and in many cases public and private labor exchanges) are to publish job opportunities. Importantly, statistical systems count jobs (usually rather imperfectly) and job creation is high on the workforce development priority lists of governments worldwide. It is equally important to acknowledge that job does not say it all. Job is a word with baggage. Is it irrelevant to the majority of 'workers' who live in poverty, who make up the world's "workforce" and for whom the concept of a (single) JOB has been and continues to be, a distant goal? lxx

The concept of sustainable livelihoods, which subsumes job with other aspects of making a living as

part of an umbrella term, was conceived in order to include the more social (soft) aspects of development and has been defined by UNDP as:

The activities, means, and entitlements by which individuals make a living.

Sustainable livelihoods are derived from people's capacities to exercise choice, and to access opportunities and resources, and use them for livelihoods in ways that do not foreclose options for others to make a living, either now, or in the future.⁷¹

Job therefore is part of sustainable livelihood as is, among other things, the work of subsistence farmers, and the often unpaid and unnoticed work of multitudes of poor women around the world, including work in the household.

Paulo Freire taught us that we should listen for palabras generadoras or "charged words" that generate our worlds and imagine how we can improve them. Job and sustainable development are just such words.

BEST PRACTICES

Workforce development in practice ranges widely in approach and geography and it also is seen as in need of basic direction. The strategic definition of workforce development, in one view, leads to "Five

Compass Settings" by which developing nations may guide their workforce "ships", via best practices, to economic success.

Possible solutions and approaches to workforce development include creating and sustaining linkages, at all levels, among the employment pool, market conditions and the policy environment, educators and training providers, and employers. The solutions and approaches also include a workforce diagnostic that is process-driven among these linkages, and also the use of a cluster-

based approach in which the focus is on one industry cluster. In the ARCC Strategy (A=Adaptive, R=Resilient, C=Competitive, C=Clusters) for working through clusters,⁷² USAID and other donors invest in a dynamic, self-reinforcing process of economic growth through workforce development that links all of the stakeholders in an economic cluster to each other. If then there is a sudden shift in the economy, the system is able to quickly adapt.

Tourism Workforce Development for Cluster Competitiveness: The Example of Egypt⁷³ is a study that

Five Compass Settings

- **Enterprises, the economic engine of the nation, must upgrade their own strategies for workforce development to succeed in the new economy.**
- **Educational institutions must become far more flexible, responsive, and adaptive.**
- **Public policy must support increasing public/private partnerships and an engaged citizenry.**
- **Leaders, in government, outside government, and within donor institutions, must support the importance of local, grassroots, citizen participation as the cradle of economic growth, improved governance, and improved workforce development.**
- **USAID has pioneered such approaches in several countries, including South Africa and Egypt, and they show much promise. However, much more needs to be done and that is why the Agency has developed a major new initiative...a global workforce development 'IQC' that allows USAID Missions everywhere to buy in and participate.**

Monika Aring, EDC
Rising to the Workforce Challenge



provides an example of a cluster-based approach. A cluster is defined in this study as “a group of companies and service providers that rely on an active set of relationships among themselves for individual efficiency and competitiveness, linked by buyer-seller relationships, common customers, and common linkages to industry “foundations” (e.g., schools)”.⁷⁴ In the case of the Egypt experience, the cluster was and is tourism. The Egyptian tourism cluster promotes efficiency and competitiveness through (1) the work of the cluster foundation; related and support industries such as cleaning services, catering, advertising, and food producers; (2) facilitating industries such as hotels, restaurants, and travel agencies; and (3) attractions, such as museums, beaches/resorts, archeological sites, and entertainment.

A National Skills Development Strategy was established in South Africa.⁷⁵ The strategy emphasizes improved employees’ skills, equal opportunity, workforce development programming, lifelong learning, flexibility and decentralization, partnership and cooperation between government and industry, and a national education and training program. USAID actively supports a Labor Skills Development Strategy in South Africa through scholarships and skills training.

Workforce Preparation in Europe and Eurasia: In the Europe and Eurasia region, the challenges of workforce development are varied, and most of them are related to the communist legacy. Workforce preparation, through the education system, is free, but the graduates are often over-trained for the jobs they do. Centralized planning gives job appointments, but ability levels of the workers are often ignored. The economic environment is one in which there is little competition and few service-driven industries. There is little focus on the customer.⁷⁶

For “Making Cents,” an organization with offices in New York and Washington D.C., micro-enterprise development is the path to workforce development and job creation is the overall objective.⁷⁷ Its programs are now being used in 15 countries including Kazakhstan, South Africa, France, the UK, and the USA. Making Cents was founded to promote entrepreneurship and micro-enterprise training and education for youth and adults. It also seeks to make training accessible through the development of innovative training materials and training-of-trainers programs. Making Cents believes that micro-enterprise and entrepreneurial training should form an integral part of the education and training available to all youth and adults and that entrepreneurial skills are not

just related to business but are a mind-set. The characteristics of this mind-set are perceived to empower people with an increased sense of self-esteem and independence. The Making Cents programs use experiential methodologies in which the role of the teacher is to facilitate, not deliver, information and the action-based methodologies allow participants to apply skills, knowledge, and examples that are relevant to their own immediate environment. The major barriers to the approach continue to be lack of qualified teachers and trainers, lack of effective training materials, and the overall cost of materials and personnel.

U.S. community colleges offer another path to the application of skills development for employability. An example of this channel of assistance was the support, until 1998, of the Center for Vocational Education in India by a group of American community colleges. As a result of this previous effort, Madras Community College became a prototype for other community colleges in Southern India in the summer of 2001. Spin-off impacts of American community colleges’ efforts have also occurred in Tobago, Aruba, Namibia, Ukraine, and Thailand. It has been pointed out that community colleges can and should be an important partner for capacity building in workforce development.⁷⁸

Table 4

II

The economic growth and workforce development challenge is profound and daunting. It is “our choice.”⁷⁹ It is our choice to do nothing about the coming tide of unemployed youth and adults. It is also our choice to seize the opportunities represented by globalization to help countries build their societies (and economies) “by skilling their human resources—the only truly competitive advantage that’s sustainable over time.” IF workforce development is our choice, THEN the second option—skilling international human resources—must be chosen with clarity of direction, resolve, and a strong foundation of resources.

Ten Types of National Capacities
The Capacity to Set Objectives: based on an understanding of the national and local contexts, requires sound data and information about current needs and targets vulnerable groups.
The Capacity to Develop Strategies: requires a clear prioritization of needs, an understanding of the processes that can contribute to meeting them, and the development of meaningful benchmarks to determine progress.
The Capacity to Draw Up Action Plans: based on an agreed strategy, requires a detailed listing of required actions, identifies the parties involved in carrying them out and a clear timetable.
The Capacity to Develop and Implement Appropriate Policies: requires design of policies and methodologies for effective and accountable policy implementation.
The Capacity to Develop Regulatory and Legal Frameworks: requires adapting national laws and regulations for compatibility with relevant local conventions.
The Capacity to Build and Manage Partnerships: requires full and constructive consultation among key stakeholders (based on appropriate incentives) to secure commitments by the organizations and entities to be involved in the implementation of the action plan.
The Capacity to Foster an Enabling Environment for Civil Society: the success and sustainability of development initiatives require the participation of all relevant stakeholders, particularly the more vulnerable.
The Capacity to Mobilize and Manage Resources: requires a quantification of the resources (human, financial and other) that are needed for implementation and requires that these resources be mobilized and put at the service of the plan.
The Capacity to Implement Action Plans: requires that those responsible for carrying out every part of the plan be appropriately selected, that they be aware of their responsibilities, and know to whom they are accountable for performance.
The Capacity to Monitor Progress: requires that people and mechanisms be put in place to enable the measurement of agreed benchmarks and indicators; provides for feedback to ensure that objectives and strategies are adjusted so that progress is realized and sustained.
Stephen Browne. Developing Capacity Through Technical Cooperation: Country Experiences United Nations Development Programme/Earthscan Publications 2002, 4.



CHALLENGE THREE: HUMAN CAPACITY DEVELOPMENT AND TRAINING

THE CHALLENGE IN CONTEXT

As with all the challenges, it is essential to begin with clarity of definition, and capacity development requires this. The term capacity development, as differentiated from capacity building, has been referred to as a long-term process that encompasses many stages, including building capacities and ensuring ownership and sustainability.⁸⁰ Capacity itself has also been viewed as occurring in two dimensions—human resources and organizational functions—with capacity-building involving human resources development and organizational engineering. When reference is made to the public sector, institution building is used. Capacity is defined as “the ability to perform functions, solve problems, and set and achieve objectives.”⁸¹ Browne, writing for UNDP, also differentiates between three levels of capacity: individual capacity, institutional capacity, and societal capacity (“the opening and widening of opportunities that enable people to use and expand their capacities to the fullest”).⁸² Amartya Sen, as noted earlier, emphasizes the importance of “development as freedom:” freedom to develop human capabilities to dream, reflect, and make choices.

There has been an increasing call to emphasize (or re-emphasize) the linkages between goals and the development of national capacities. One proposed set of general goal/capacity linkages, albeit in the engineering mode, is shown below.

CRITICAL ISSUES

Training is a facet of capacity building (and, as such, usually short-term) rather than capacity development. Training has long been regarded as a panacea for the ills of organizations, including educational organizations, around the world. That it has not been that panacea has not surprised many practitioners, including those in the training field, but it has also eluded many in international and development education. Training people, especially using didactic methods, and then dumping them back into organizational environments to wallow once again in the problems that continue to exist, has been counter-productive. Institutional change is also required. On-the-job training that involves committed mentoring, or training that takes a more comprehensive view of organizational development, including a sense of ownership by trainees and performance improvement objectives, offer more viable training alternatives to the millions left behind. For these reasons, broad terminology such as human capacity development provides greater value and utility in its inclusiveness.

Training does not take place in an institutional vacuum. As Thompson (1995) has observed, “training alone will not convert a conventional, technically-oriented, bureaucratic institution into a more people-centered, learning-oriented, strategic organization”.⁸³ In order to have a lasting impact, training has to be linked closely to a variety of internal change processes—changes to an organization’s working rules. Thompson’s view of training refers not to simple classroom-based teaching and instruction but rather the creation of interactive learning environments and continuous learning opportunities. . . becoming ‘learning organizations’⁸⁴. . . to use the parlance of organizational change guru Peter Senge and his classic, *The Fifth Discipline*.⁸⁵

For training to have any impact at all, it must be one of an array of elements that comprise a social learning process, and be integrated into a program of human capacity development; an idea acknowledged by the coupling of human capacity development and training in many international development institutions. To paraphrase the oft-told parable: “if the only tool you have is a saw, every problem will look like it should be cut into small pieces.”⁸⁶ The problems, however, require making connections among a varying set of human capacity development processes and responses.

BEST PRACTICES

There is a broad range of approaches to human capacity development. Human capacity can be developed, for example, by learning to “do” democracy, by using distance-learning resources, via training, through a process known as Performance Improvement, and through a variety of other subject and learning methodology pathways. Each approach offers design and implementation strategies and lessons to be learned. Examples of these approaches are arranged here in three groups: Improving Training Design and Implementation, Learning to Do Democracy, and a more general third category covering Distance Learning Resources, Digital Story Telling, and Training Implementation and Management. Critical issues and lessons are offered with each approach description.

IMPROVING TRAINING DESIGN AND IMPLEMENTATION: ISSUES AND INNOVATIONS.

What has been traditionally referred to as training (the transfer of knowledge, skills and attitudes) has been “the largest single type of intervention funded by USAID for many years since the demise of infrastructure projects.”⁸⁷ Academic training has declined significantly for a variety of reasons, “among them the shorter span during which Strategic Objective Teams (USAID

terminology) must demonstrate that the investment is likely to help”⁸⁸ while short-term U.S. and third-country training has continued but at a lower rate in recent years. In-country training has expanded everywhere but is regarded as a “manifestation of the incorrect view that the same results can be obtained by spreading the training to a larger number of people locally.”⁸⁹ A major reason for the low level of return on investment is because, in part, there is little analysis of organizations’ performance goals.

The habits and characteristics associated with the way that USAID, for example, implements training in Africa highlight, according to Andrew Gilboy, why the rate of return on such training is so low. In abbreviated form this provocative list includes:⁹⁰

1. *The Training Wish List.*

“Training needs assessments” are often no more than inventories of training ideas put forward by employees. There is seldom any link to changes that might improve organizational outputs.

2. *Training as Donor-Driven.*

Often training is already budgeted so therefore managers assume it should be implemented.

3. *Training as Supply-Driven.*

Many U.S. universities, NGOs,

and for-profit training providers have developed capacities to train professionals from developing countries, often in languages other than English. These programs are marketed, sometimes aggressively. Sometimes there is an in-country organizational analysis but more often than not there is a “dispensing of the workshop” as publicized in brochures.

4. *Training Distributed as a Benefit.*

Viewing training as a benefit to meet individual needs fails to link interventions to results, strategic objectives or organizational change.

5. *Training to Win Friends.*

It is a ‘good thing’ to offer training to counterparts and local professionals in that they will later be able to communicate with U.S.-educated high-level officials in-country.

6. *Training to “Build Capacity”.*

Training in an institution does not build capacity unless the participants apply their skills and knowledge, engage themselves and peers in workplace behavior changes, and are supported in the entire process by supervisors and leaders.

7. *Training as a Quick Fix.*

Organizational development takes time.



A response to these perceptions is Performance Improvement (PI), a non-training solution defined as “a systematic approach to analyzing current and desired performance in an organization”⁹¹ and that emphasizes organizational rather than individual performance as well as workplace performance solutions. A major insight of PI is that focusing on individuals does not bring about performance changes. Organizations must focus on workplace performance solutions instead of providing employees with more individual training. Only changes in workplace practices will succeed in removing obstacles that impede high performance by individuals.

The PI approach is based on first understanding the relationship between behavior and performance:

Behavior + Accomplishments = Performance

Performance is then measured by measuring the ‘gap’ between desired performance and present performance. An intervention is then designed to fill the gap. ‘Performance’ is measured in three steps. In the past, this process is started with the last step but it is the first two steps in PI that are most important for organizational performance:

- Performance Analysis: Does the organization have a vision/mission/objectives?

- Process: Does the organization have adequate procedures, work flow, information flow?
- Job/Employee: What are the employee’s tasks and responsibilities, and are these suitably aligned with their individual abilities?

Tools used to measure performance include interviews with decision makers and employees, a review of documents, an analysis of employee competencies and values, and focus groups and presentations. When the causes of the gap between desired performance and present performance are identified, the solutions will become apparent. The basic PI steps for this process are:

- Build consensus for change within the organization;
- Conduct a performance-gap analysis;
- Conduct a cause analysis;
- Propose and design interventions with partners;
- Implement the interventions;
- Monitor the change and make adjustments.

The PI approach aims for incremental change and as its designer noted, “the intervention doesn’t have to address all of the problems to be effective.” Performance Improvement offers an interesting,

graduated and logical approach to implementing organizational change and tackling human capacity development issues.

LEARNING TO DO DEMOCRACY

School-based civic education or “Learning to Do Democracy” in developing countries is an entirely different type of training; training that receives little of the funds earmarked for Democracy and Governance. The focus of civic education includes the creation of support for democracy and tolerance for other points of view, and the development of advocacy initiatives. One particularly interesting element of this effort is the promotion of democracy within early childhood education through Step-By-Step (SBS) programs.⁹²

The basic premise of early childhood education that promotes democracy is that children “who encounter democratic principles at a young age are more likely to develop a democratic world view as adults, translating into respect for individual and human rights, and personal empowerment within the framework of civic responsibility.”⁹³ Step-by-Step (SBS) programs are now in operation in 28 countries and help to introduce democratic educational methods (while not changing the standards of education in each country). Democratic classrooms, making use of a variety of learner-centered techniques, emphasize children working and

cooperating together as well working individually, solving problems and making choices. The cornerstones of these programs are family and community involvement, individualized teaching and learning, equal opportunities and access to quality education services, and the development of critical thinking skills. The programs are now used by more than 82,000 teachers and impact on 600,000 young children.⁹⁴ The impact of the SBS program, based on a 1999 USAID evaluation, appears to be positive, with democratic practices pervasive in SBS classrooms.

Civic education also appears to be an “emerging posture” of USAID because it seems appropriate as a tool to inform ways of thinking. Until recently, however, there has been relatively little testing and evaluation of civic education programs. One study⁹⁵ looked at three countries—Poland, Dominican Republic, and South Africa—and concluded that civic education can make a difference in adults, especially when using participatory methods. This study also showed that men exhibited more civic behaviors than women, and so the question becomes how to make such programs more appealing to women. The objectives of the programs in these three countries were to increase democratic participation, civic competence, and adoption of democratic values such as tolerance and inclusiveness. The

effects of these civic education programs in terms of local participation included getting involved in organized problem-solving activities, attending local government meetings, working on local election campaigns, and contacting local government officials. Adult civic education programs in developing countries such as these are truly jumpstarting events because they do not have the benefit of 18-20 years of education available in the developed world. A set of useful lessons learned emerged from this study:⁹⁶

- the low rates of participation in most political systems, even moderate increases connected with good civic education programming can make a significant contribution to democratization.
- Teaching methods matter: “Civic education initiatives that provide little exposure, that lack a strong participation component in their instructional components, and that do not inspire confidence in their instructors, yield little impact.”
- Training of trainers is worth the investment.
- One size does not fit all in civic education programming. There was considerable variance of impact among the countries evaluated.
- Gender does make a differ-

ence. Including gender aspects systematically in future training of trainers might help at least reduce the tendency for programming in this area to widen gender disparities.

- The political advantages conferred by education can be compensated for to a modest extent by good civic education. Higher educational levels not surprisingly correlate with better scores on democratic orientations, but good quality civic education can help make up for these differences to some extent.
- Since participants already belonging to groups tend to gain greater benefits from civic education programs, group membership may be a useful training device for recruiting participants.
- “Fade-out” problems do exist, but high quality civic education programming appears to withstand them.

As an emerging issue, civic education is beginning to show proof of impact in building human capacity but part of this challenge “is trying to reach out to other donors and bring them into the orbit of valuing civic education and supporting those efforts.”⁹⁷

DIGITAL STORYTELLING

Another approach to human capacity development is “digital sto-



ytelling” which has been defined as “using digital media to tell meaningful stories.”⁹⁸ Digital media in this case refers to video, and the channel to human capacity development is through a technique called ‘knowledge management through storytelling.’

“Knowledge management” is basically getting the right information to the right people at the right time. There are, however, different types of knowledge. There is explicit knowledge, which is codified information represented in data and text. There is implicit knowledge that can be, but has not yet been, articulated and codified. There is also tacit knowledge that refers to unarticulated and inexpressible abilities and intuitions. The key questions for a knowledge manager involve how to manage these three forms of knowledge. Because it would take much energy to make tacit and implicit knowledge explicit, it is important to ask what of the implicit knowledge is important and how can it be captured. Storytelling is one way to do this.

Storytelling refers to narrative modes used by people to convey ideas, experiences, theories, emotions, desires, and interpretations. Storytelling has sometimes had a bad reputation as something children do but not as a serious, adult management activity. It is, however, an important executive skill, and

many effective leaders are also great storytellers. In a particularly useful and entertaining work, *Squirrel Inc.*,⁹⁹ Stephen Denning, a former World Bank executive, outlines seven high-value forms of organizational storytelling, differentiating each form on the basis of the objective of the storyteller (eg., to communicate a complex idea and spark action, to communicate who you are, to transmit value, and to lead people into the future). Storytelling is a difficult skill to master, but it is essential for launching initiatives and learning from successes and failures.

Using video as a means to gather and focus implicit knowledge that has not yet been articulated and codified is at the center of digital storytelling. Guerrilla video approaches are used to gather video footage from an organization. This footage contains one-on-one shots of core messages that need to be amplified through the organization. Knowledgeable people within the organization are interviewed. The resulting video becomes the foundation for digital storytelling and organizational development processes.¹⁰⁰

DISTANCE LEARNING

Another path to human capacity development is through distance learning. Cutting edge work is currently being spearheaded through a consortium of U.S. governmental

and private partners collaborating to make diverse training materials available on the web. This work is known as ADL/SCORM; an Advanced Distributed Learning (ADL) initiative with the goal of developing the Sharable Courseware Object Model (SCORM).¹⁰¹

Distance education has been around for a long time, and over the years a number of core principles have developed for it. The first principle is that distance education is and should be more about learning than technology; supporting the needs of learners is seen as fundamental. A second principle is that there needs to be development of both technological and human infrastructure. Third, distance education must emphasize certain values for itself. These include excellence, diversity, accountability, and commitment to world-class global education programs. Finally, distance education requires a substantial organizational commitment.

For distance education, partnerships are now seen as “in”, with university relationships and partnerships increasing. There once was a split in the ranks of those working in distance education between those who favored the virtual university movement and those who favored establishing inter-organizational partnerships. The virtual university movement is now fading, and the networks of universities

and other organizations working in reciprocal ways are on the rise. The partnerships face many issues: administrative, financial, and organizational change; the need for shared visions, content, and quality; and faculty issues such as commitment, compensation, and incentives. From a purely financial perspective, distance learning can be very expensive unless there are 'perfect' conditions. Distance learning of course also occurs through the efforts of organizations other than universities.

II

There are no "one size fits all" strategies or designs for implementing human capacity development. The approaches are situational and the challenges are varied. School-based civic education, digital storytelling, distance education, Performance Improvement (PI), and other approaches each have roles. Most require a high degree of participation and good facilitators. IF no one is to be left behind, THEN organizations, and particularly educational organizations, must regard training as but one tool for better performance; an imperfect tool that needs to be surrounded and supported by a foundation of other processes in order to achieve effective capacity development.

CHALLENGE FOUR: CAPACITY DEVELOPMENT AND HIGHER EDUCATION PARTNERSHIPS

THE CHALLENGE IN CONTEXT

As USAID seeks to develop a "Global Development Alliance" and other international organizations begin to explore the potential of partnerships, higher education institutions in the United States, despite the constraints post-9/11, continue to look towards partnerships with institutions in developing nations as mechanisms for implementing educational development. For the higher education sector, the "partnership" mechanism has been defined as "voluntary collaboration between American and developing country organizations that aims to achieve mutually desired objectives and that usually involves resource transfers and a written agreement."¹⁰²

Initiating and sustaining partnerships and alliances are key factors in many current efforts in higher education. Such partnerships are seen as appropriate for institutional strengthening, transfer of technical skills and approaches, and the development of long-term relationships, especially those involving US and developing country organizations.¹⁰³

Partnerships among higher education institutions of the US and

those in other countries offer a variety of advantages. They are cost-effective (universities are less likely to be concerned about profit), matching funds/cost sharing is often high (25-60 percent), there is good access to resources, capacity-building can take place (universities are uniquely geared towards building capacity), the approaches are often cross-sectoral, and sustainability can be implemented through long-term relationships.¹⁰⁴

The higher education partnership programs offer many other advantages and benefits. They help USAID and cooperating countries to access higher education resources, provide expertise in design and implementation of higher education development programs, enhance and help to launch development networks, and help to internationalize higher education institutions. The programs also help to foster a steady exchange of information and resources to benefit all sides and yield results beyond the life of each partnership (continuity/sustainability). Increased internationalization of American students and teachers occurs through faculty and student exchanges. Other networks and alliances can be started and there are the possibilities of improved economic and trade ties. To achieve these results, "partnerships have to be worked at from all ends."¹⁰⁵ It is the responsibility of the partners to



nurture these relationships and to take advantage of opportunities to develop and expand.

Higher education, through partnerships, also can offer opportunities to change not only curricula but also modes of learning. The dean of development writers, Robert Chambers, in *Whose Reality Counts?* (1997)¹⁰⁶ provides a set of five prescriptions for higher education that can complement and enhance its other assets:

1. Shift from didactic teaching to participatory learning.
2. Shift from classroom and things to field and people.
3. Learn through empowering lowers.*
4. Stress the personal and interpersonal.
5. Value diversity, creativity, and dissent.

Robert Chambers
Whose Reality Counts?
Putting the Last First

* Note: a "Chamberism" indicating those without power; local rural and urban people.

Building, and developing, education sector capacity through higher education partnerships offers a variety of benefits, and a challenge.

CRITICAL ISSUES

The challenges to building, managing, and maintaining higher educa-

tion partnerships are substantial. Higher education partnerships have been described as 'organic' in that they usually go through four sequential stages:

- Exploration.
- Establishing trust.
- Coordinating systems.
- Cooperation.¹⁰⁷

Effective partnerships in higher education are also seen to be associated with a set of factors, including:

- A supportive country context.
- Mature participating organizations.
- Similar organizational activities.
- Similar norms and organizational culture.

Complementary income structure (not competing for the same donor funds).¹⁰⁸

In order to facilitate effective partnerships there is a need to develop a common vision and a working framework among the partners. While recognizing cultural differences among these partners, there is also a need to maximize parity of power and influence and to facilitate transparent decision-making.¹⁰⁹

Sustainability is an important con-

sideration in establishing all higher education partnerships and, from experience, the sustainability issue has to be addressed early. Dispute resolution parameters that are clearly defined assist the sustainability of higher education partnerships between US and host-country organizations. Organizational and financial sustainability also require mutual consideration.

Critical issues for higher education partnerships in South Africa, for example, include:

- maintaining interest.
- commitment and ownership agreement on performance benchmarks.
- monitoring and evaluation of expected outcomes and results.
- management structures.
- replication of specific partnership strategies in culturally diverse environments.¹¹⁰

Coupled with the challenges of overall sustainability, the need for transparent decision-making and trust, and the cultural differences among key partners, higher education partnerships challenge all of the players to pay close attention to the design, implementation, and human relations aspects of their efforts.

BEST PRACTICES

There are many examples of internationally focused, USAID-financed higher education partnerships. The United Negro College Fund Special Projects Corporation, for example, manages sets of partnership grants. These include the Tertiary Education Linkages Project (TELP), which is available to other institutions as well; and the International Development Partnerships (IDP). The Education for Development and Democracy Initiative (EDDI) partnerships, a program launched in 1998 and concluded by September 2004 (but which has been superseded by other efforts), involved the public and private sectors. Focusing on partnerships at many levels, EDDI involved policy-making and grassroots democracy networking through community resource centers, technology innovations, and girls' scholarship and mentoring activities. EDDI sought to improve the level and quality of education in Africa and emphasized the participation of young girls and women in the educational process.

These and other higher education partnerships vary widely in content and focus. Organizing themes include:

- **Energy and Environment** partnerships in Bangladesh, Cambodia, and Jamaica/Barbados;
- **Health Sector** partnerships in

Brazil (Tennessee State University and University of Amazonas), and South Africa (University of Massachusetts and the Medical University of South Africa);

- **Industrial Research** sector partnerships in Egypt, South Africa, and Tanzania;
- **Democracy and Governance** sector partnerships in Ivory Coast, Romania, and Guyana;
- **Curriculum Development** in Armenia and South Africa;
- **Food Production** sector partnerships in Ethiopia and Guyana;
- **Community Development** sector partnerships in Benin (West Virginia State University) and Cameroon.¹¹¹

Other examples come from Texas A&M University/National Autonomous University of Mexico (Animal and Plant Health Constraints to Free Trade) and the ALO Partnership Programs. The latter programs, principally in Africa and Latin America but with some projects in Asia/Near East, are international partnership programs that offer \$100,000 awards (available to all accredited US colleges and universities) in an annual competition. The foci of these programs include international workforce development partnerships offering

\$50,000 awards to develop prototype programs addressing information technology (IT) and other fields, and special initiatives designed and funded by USAID missions (e.g., El Salvador; Rwanda, West Bank, Ethiopia).¹¹²

Community colleges have offered many examples of higher education partnerships. USAID provided, in 1992, resources to community colleges to establish linkages with counterparts in developing countries (a total of \$0.5 million funded 42 projects in six countries). That funding has ended, but the impacts of those partnerships are beginning to be seen.¹¹³ Impacts in India have included 5,000 graduates of community colleges, 60 community colleges established, and a 70 percent placement rate after graduation.¹¹⁴

II

Effective partnerships in higher education present opportunities and many challenges. They are not easy, but the results can be rewarding for all the partners. IF "lessons learned" can be applied, THEN we can improve decisions about and the management of these partnerships, and in the process improve the reach and quality of education in developing nations.



CHALLENGE FIVE: EDUCATION IN CRISIS/CONFLICT SITUATIONS

THE CHALLENGE IN CONTEXT

To begin, it is important to define what is “education in crisis/conflict situations.” The most simple and straightforward answer, by Margaret Sinclair, the mother of policy and research on education in crisis situations, is that it is “when children lack access to national education systems due to manmade or natural disasters.”¹¹⁵ More specifically there are three types of crises where education in crisis situations (ECS) may be required.¹¹⁶

- **Natural Disasters**, which include storms, earthquakes, droughts, volcanic eruptions, tsunamis, and floods. Education in these circumstances is normally discontinued temporarily as school buildings may be destroyed and learning materials ruined. ECS programs would have to be established quickly but most likely would only operate for a short period of time. The earthquake and tsunami of late 2004 affecting Indonesia, Sri Lanka, India, Thailand, and other nations has put ECS programs to a major test.
- **Armed Conflicts**, which can

occur as a result of war between countries or civil strife within countries. Such conflict can disrupt the educational process for a year or many years. ECS programs established during armed conflicts last longer than those set up during natural disasters.

- **Quiet Crises**, such as epidemics, famine, and/or failure of social systems (e.g. when families are unable to care for youth). Such crises gradually lead to large numbers of children whose educational needs are not being met. For example, a new quiet crisis challenge in countries with extreme poverty is an increase in the numbers of street children.

Many different categories of persons may want education during times of crisis. One important distinction is between refugees and Internally Displaced Persons (IDPs). Refugees are people who have migrated across borders to another country for reason of unbearable conditions or by force. It is estimated that during 1999 and 2000 there were over 11.6 million refugees in the world, and a majority of them came from developing countries of Asia and Africa.¹¹⁷ Internally Displaced Persons are people who have been forced to relocate within their own country.

A study by Save the Children/UK estimated that 13 million children have been displaced by violence within the borders of their countries.¹¹⁸ Other categories of persons who may require ECS assistance include child soldiers, illiterate adults, and street children/orphans.

Four reasons have been cited as to why education should be provided in conflict/crisis situations:¹¹⁹

- Because education is a human right. This position is supported by the following:
 - Universal Declaration of Human Rights (1951).
 - 1990 World Declaration of Education for All Conference.
 - 1995 Fourth World Conference on Women.
 - 1996 Education for All Conference.
 - UN Conference on the Rights of Children.
- Because the extent of the need constitutes a moral imperative. One estimate (prior to the crisis in Iraq) found that there were in the world:
 - 12 million refugees.
 - 30 million internally displaced people (IDPs); people living within their own

country with no access to government services.

- 27 countries engaged in conflict.
- Because of the need for mitigation and crisis prevention.
 - People are being excluded from opportunities such as education, which can contribute to some crises.
 - School is a safe place for children.
 - School is a place where children can learn about peace, cultural sensitivity, and job-related skills.

Because there is a need to promote sustainable development.

- Education improves productivity and health, and enables people to participate in democratic governments.

CRITICAL ISSUES

It is a reflection of the complexity of what is presented here as one overall challenge that Dr. Marc Sommers has helpfully divided it into ten sub-challenges of effective emergency education. These are listed below and appear in more detail in the Appendix.

- **The Predominance of International Agencies and the Evolution of New System Forms**

- **The Role of Communities**
- **The Role of National Government**
- **A Mammoth Capacity Gap**
- **The Uneven Access to and Quality of Schools**
- **Formulaic vs Adaptive Educational Approaches**
- **Coordinating Education in Emergencies**
- **Inadequate Donor Funding**
- **Educating Girls**
- **Teachers I 20**

Marc Sommers Education in Emergencies: Critical Questions and Challenges

Despite recognition of the importance of emergency education and calls for its support, it is estimated that aid for emergency education reaches, at best, only 30 percent of refugee children, and this support is often subject to “extremely disruptive short-term emergency funding arrangements”.¹²¹ It has also been pointed out that the percentage is much lower in war zones, in part because schools are military targets in most of the world’s civil conflicts.

There are a number of other basic issues that must be considered in ECS programs. These include the question of when does the program start (usually as soon as possible), the characteristics of the

people needing education (e.g., age, language, prior education, curriculum), the nature of the curriculum, and who will teach and manage the ECS program. Other issues include psycho-social factors, safety and security, and accreditation. Gender is of particular significance, with a UNHCR official noting that only one in ten school-age refugee girls worldwide is attending school.¹²² UNICEF has noted that “education plays an essential role in enabling women and girls to assert themselves and to develop the skills and competencies necessary to cope with new challenges during emergencies.”¹²³

As practitioners¹²⁴ have discovered, and as noted previously, there are important differences in the impact on education systems from natural disasters and armed conflict. Disasters are shorter than conflicts. In conflicts, displaced people move around within their own country while in conflicts they usually just run. The psychological dimension is usually much more serious in conflict situations, with the possibility of severe psychological trauma quite strong. In conflicts, many refugees end up coming to camps. One of the assumptions of development efforts is that refugee communities are functional, but in such war-torn places this is often not true.

The impact on educational systems after a natural disaster can be enormous as was seen when



MATRIX OF ACTIVITIES AND SUPPORT NEEDED FOR IMPLEMENTING AN EMERGENCY EDUCATION PROGRAM

Topic	Sub-topic	Immediately
Psychosocial Component	Recreational, Expressive and Community Service activities.	<ul style="list-style-type: none"> ● Quick structured activities for children and youth. ● Organization of community service activities.
Protection	Monitoring of the condition of children.	<ul style="list-style-type: none"> ● School statistics system developed including girls, children and young persons with disabilities, and minority students.
Life Skills Component	Life saving information that is outside or not adequately covered in the normal curriculum.	<ul style="list-style-type: none"> ● Dissemination of urgent preventative health, HIV/AIDS, environmental, land-mine awareness messages. ● Preliminary training of teachers and community workers in life skills. ● Audit of school subjects for removal of hate messages.
Academic Component	Non-formal Education (language and numeracy classes & related activities	<ul style="list-style-type: none"> ● Pre-school classes and groups ● Primary school type groups ● Youth groups including youth study group if desired.
	Formal Education	<ul style="list-style-type: none"> ● Planning restoration of a unified system of schooling through focus groups and planning meetings with community, government and regional authorities.
Capacity Building and Building of Operational Systems	Teachers and School Administrators	<ul style="list-style-type: none"> ● Volunteers teaching and working with young people.
	School Management Committees/PTAs	<ul style="list-style-type: none"> ● Concerned parents and leaders identifying space, shelter and coordinating volunteers.
	Local Government and NGO's	<ul style="list-style-type: none"> ● Identification of educational professionals and inclusion into planning and management of educational programs.
Supplies	Shelter	<ul style="list-style-type: none"> ● Plastic sheeting, poles, tarpaulin/plastic mats or tarpaulins for floor covering. ● Where possible area should be fenced.
	Furniture	<ul style="list-style-type: none"> ● Blackboards and supports, teachers' chairs
	Student Materials	<ul style="list-style-type: none"> ● Start-up set of exercise books/slates, pens/pencils, and recreational materials. Additional exercise books for adolescents/youth. ● Recreational/ other learning materials for life skills and trauma.
	Teacher/ Facilitator Materials	<ul style="list-style-type: none"> ● Exercise books, pens, textbooks, teacher's guides, or resource materials for preparing lessons; including basic resources on how to teach. ● Teaching/learning materials for trauma healing and life skills education. ● Registration and attendance books for students.

	Sooner	Later
	<ul style="list-style-type: none"> ● Incorporation of the importance of psychosocial issues into teacher in-service training. ● Psychosocial healing discussions for teachers and leaders in youth, women's and community groups. ● Strengthening of structured activities for adolescents and youth. 	<ul style="list-style-type: none"> ● Training of at least 2 persons (male/ female) per school as counselors. ● Systematic and continuing development of psychosocial activities within the curriculum. ● Development of programs for non-school going children and youth to provide basic literacy, numeracy, and life skills.
	<ul style="list-style-type: none"> ● Community survey using students and community groups to identify non-school-going children. ● Programs developed to target students not attending school due to discrimination and/or weak family motivation and poverty. 	<ul style="list-style-type: none"> ● Integration programs established and refined with adequate measures taken to ensure children's security. Including liaison with community (women, youth, and leaders) groups. ● Special programs to promote gender equity and participation of persons with disabilities established, documented.
	<ul style="list-style-type: none"> ● Audit of school subjects for Peace-tolerance/citizenship, health and environmental content; enriching curriculum with simple activities in these fields. ● Programs in the above developed for non-school going children, youth groups, and community groups. 	<ul style="list-style-type: none"> ● Thematic life skill activities in health, HIV/AIDS avoidance, citizenship/peace education included in the timetable following grade-wise curriculum for one period per with specially trained teachers.
	<ul style="list-style-type: none"> ● Pre-school classes and groups ● Primary school-type classes merge into normal schools. ● Some youth study groups develop into Secondary school classes. 	<ul style="list-style-type: none"> ● Non-formal educational activities with a Life skills Component for non-school going youth. ● Coverage extended to meet community needs e.g. youth/adult/women's literacy, with a Life Skills Component built-in.
	<ul style="list-style-type: none"> ● Primary school type classes merge into normal schools. ● Some youth study groups develop into secondary school classes. ● Emergency-related curriculum elements and structure prepare for the new school year. ● Restoration of a standardized curriculum similar to area of origin. 	<ul style="list-style-type: none"> ● Arrangement made for student certification. ● Where applicable (for refugees) development of a curriculum that "faces both ways" serving both the language and curricular needs where the students are, as well as in the area of origin. ● Inter-agency work to define 'basic competencies by school grade, and develop related study test materials.
	<ul style="list-style-type: none"> ● Assessment of volunteers' skills and development of on-going in-service training. ● Confirmed by selection tests ● Payment of "incentives" to full time workers to establish daily consistency, lessen turnover and improve quality.. 	<ul style="list-style-type: none"> ● Self-management of Schools.. ● Design of in-service training to cumulatively lead to recognized qualification. Certification of trained teachers and school administrators by government or regional body/bodies
	<ul style="list-style-type: none"> ● Committees selected and approved by community. ● Trained to promote educational quality, relevance, participation, and management. 	<ul style="list-style-type: none"> ● Trained in strategies for post-conflict reconstruction and the development of sustainable educational systems, and introduced to Life Skills messages
	<ul style="list-style-type: none"> ● Strategies developed to facilitate their ability to implement projects including material support, transportation, communication and training needs. ● Grants and administrative training supplied for educational services. 	<ul style="list-style-type: none"> ● Progressive increase in responsibilities of local partners. Leading to handover of management of educational programs and responsibilities. ● Facilitate direct donor support to government and local NGOs.
	<ul style="list-style-type: none"> ● More cost-effective shelter, typically good roof and floor, low tech walls. 	<ul style="list-style-type: none"> ● Where applicable construction of permanent schools.
	<ul style="list-style-type: none"> ● Benches/desks of the correct size for students preferably made by refugee youth apprentices. Oldest students receive desks before younger students. 	<ul style="list-style-type: none"> ● Chairs and tables for teachers and school administration. ● Locking cabinets for schoolbooks and administration.
	<ul style="list-style-type: none"> ● Textbooks or extracts/similar texts based on area of origin curriculum replenishment of consumable supplies. ● Supplies to promote participation, e.g. secondhand clothing, sanitary materials, food incentives. 	<ul style="list-style-type: none"> ● Replenishment of consumable supplies. ● Additional items added according to local and programmatic needs. Supplies for new programs e.g. literacy, youth writers, sports groups.
	<ul style="list-style-type: none"> ● Refugee/IDP professionals should hold writing workshops to reproduce key elements of previous curriculum and/or emergency related materials for schools and youth. ● Development of teachers' guides focusing on developing the classroom skills of new teachers. 	<ul style="list-style-type: none"> ● In reconstruction phase, mass reproduction and distribution of revised post-conflict textbooks teacher's guides, curriculum education aids and supplementary materials, with life skills areas strengthened, hate passages deleted, and controversial areas resolved.



Hurricane Mitch struck Honduras in 1998. More than 5,000 people died, and one third of the population of six million people was displaced. The purely physical construction impact on the education system consisted of 3,000 schools out of 9,000 destroyed or damaged. More than 700 other schools were further damaged after being used as shelters (e.g., furniture used as firewood, equipment destroyed). The most immediate question was how to communicate with teachers and students. This was solved by the use of five-minute daily radio broadcasts with instructions for educators and parents. In the long term the terrible damage opened a window of opportunity for reforming the Ministry of Education and quickening school reconstruction.

There are also important differences between emergency education and development education. One obvious difference is speed; emergency education needs to be fast in order to protect children. The structure of a school gives children an identity and can normalize the environment for them, especially in refugee situations. Typically, setting up an ECS program is divided into three phases that often blend together:

- Phase I: finding safe spaces and setting up recreational activities.
- Phase II: characterized as non-

formal education, this phase includes such topics as peace education, immunizations, survival messages, HIV/AIDS, land mines, and sanitation.

- Phase III: re-establishment of formal education using a standard curriculum. (it is important not to try to change the national curriculum but instead supplement it with complementary activities).

A “Matrix of Activities and Support Needed for Implementing an Emergency Education Program,” (See previous page) prepared by Margaret Sinclair and Carl Triplehorn,¹²⁵ neatly summarizes, in general, the principal components (psychosocial, protection, life skills, academic), and the timing of this type of program.

BEST PRACTICES

The best practices of ECS are divided among a wide array of organizational actors. These practices continue to evolve through the efforts of the varied major players in ECS: the UN agencies (UNHCR, UNESCO, and UNICEF); USAID (the Bureau of Humanitarian Response); the U.S. State Department, and NGOs. Each plays different roles during crisis situations, whether they are armed conflicts, natural disasters, or quiet crises, and it is important to understand how each may help to maintain the fourth pillar of emer-

gency assistance: education.¹²⁶

The United Nations is the major international body that funds and coordinates aid for refugees and IDPs. *The United Nations High Commission for Refugees (UNHCR)* serves people who cross country borders during a crisis. It provides policy direction and leadership for the administration of refugee camps, either directly or through contracts with NGOs. It also helps to improve the quality of ECS programs, increase girls' participation in such programs, and develop a broader range of programs that reach beyond the primary school years to touch on special topics such as HIV/AIDS, Environmental Education, and Peace Education. *UNESCO* establishes strategies and priorities for ECS programs. It also develops tools such as curricula and teacher education packages for ECS programs as well as checklists for setting up such programs. *UNICEF* is the main UN agency that deals with the emergency education needs of IDPs and has a large field staff of teachers and others involved in education topics for youth-at-risk, including HIV/AIDS, girls' education, and education in emergencies.¹²⁷ Other important and relevant UN programs include the *World Food Programme* and the *International Organization of Migration (IOM)*.

USAID, through its *Bureau of Humanitarian Response (BHR)*, works with American embassies to coordinate American response to armed conflicts, disasters and other crises. Three agencies within USAID/BHR focus on crisis issues. *The Office of Disaster Assistance (OFDA)* helps other nations “to prepare and plan for disasters and mitigate their effects, and teaches prevention techniques to increase the skills of local people to respond to disasters.”¹²⁸ OFDA also fields disaster assistance response teams (DARTS) in crisis situations. The Office of Transitional Initiatives (OTI) helps countries to make the transition from armed conflict to democracy. It focuses on “post-crisis needs such as demobilization and reintegration of soldiers, electoral preparations, and oversight and support for justice initiatives such as war-crime tribunals; landmine awareness and removal, and community self-help projects to reduce tensions and promote democratic processes and conflict resolution within communities.”¹²⁹ *Food for Peace (Public Law 480)* supports both humanitarian and sustainable development assistance in the form of American agricultural commodities. These resources can be used to “provide nutrition to sustain learning, as an incentive to attend school, and as an incentive to provide community support to school construction or maintenance.”¹³⁰

The U.S. State Department, through its *Bureau of Population, Refugees, and Migration (BPRM)* responds to emergencies in a manner similar to USAID’s Bureau of Humanitarian Response, albeit with a budget that is higher than the OFDA and BHR budgets of USAID.

Non-governmental organizations (NGOs) also play an important role in ECS programs, and the UN and USAID frequently contract with them to deliver specific services.

Momentum is now growing to focus more clearly on ECS within the international development community. A major focal point is the Inter-Agency Network for Education in Emergencies (INEE). The objectives of the INEE are to develop strategies and mechanisms for collaboration among the different actors within the ECS organizations and institutions, and to collect best practices and other information useful in establishing an ECS program. INEE members include multinational and bilateral agencies, government ministries of education, NGOs (national and international), practitioners and experts, academic and research institutions, foundations, and banks. The INEE Steering Group now includes CARE, the Norwegian Refugee Council, UNESCO, UNHCR, and UNICEF. INEE is really an alliance, not a formal institution.

A major challenge for this alliance and for ECS efforts in general continues to be funding. Emergency education in refugee camps is a relatively low-cost investment. It facilitates organization of the camps, and it frees parents to address other issues such as water and sanitation and food distribution. Education is also a tool for social protection and it provides a sense of normalcy. Nevertheless, “the intractability of some funding agencies on the subject of emergency education is troubling.”¹³¹ This disjunction between educational need during emergencies and current humanitarian response, according to one expert, boils down to a “lack of political will (and knowledge) to give priority to education, training, and lifelong learning.”¹³²

EDUCATION AND CONFLICT PREVENTION

Education and conflict prevention, although often viewed as a stand-alone topic, are briefly considered here because they are also closely related to the other themes within this challenge. The basic question is: “How does education prevent conflict?”

There are many ways to analyze the linkages between education and development. Variables include pedagogic systems, policies and inputs, outputs and outcomes. There also needs to be a focus on learners and what is learned as well



as such measures as quality and quantity. In order to understand education and the prevention of conflict more fully, however, it is necessary to include other, less 'usual', educational policy criteria and variables. Alternative analyses must focus on the societal consequences of mass public education. Going deeper than the plea that "it takes a village," these alternative analyses must recognize that "educational systems shape social capital; in a sense it takes a school to raise a village and an educational system to create a nation."¹³³ A broader interpretation would be that it takes a learning system or systems to raise a village and a nation.

Attention to inputs is important to understanding education and conflict prevention linkages. School building and school works set standards for other civil works, and public understanding of these aspects can drive other social development. Student record systems are often more accurate and more helpful than other data, such as from a census. Administrative and logistical problems for schools, such as paying teachers and teacher accommodation, are often linked to other development measures. Teachers often set benchmark standards, such as for salaries, which affect or are linked to other parts of the civil services of many nations. Preparation and distribu-

tion of textbooks are enormous logistical tasks with many social and economic linkages.

It is important to understand that where the provision of mass education is disrupted, there are varied consequences—political, social, and economic. When mass education is disrupted, political capital is dissipated, the legitimacy and the mandate of authorities are questioned at all levels, and social capital is eroded. For this and other reasons, there is a significant connection between education and the prevention of conflict.

II

Education for Crisis Situations is, for better and for worse, a growing and important development sub-field. Providing the stability of education has been shown to be crucial for refugees, IDPs and others in a crisis circumstance. IF "momentum (truly) is building" in the international development community for ECS, THEN ECS deserves to see concomitant resources in terms of increased funding and improved collaboration in policy and practice.

CHALLENGE SIX: HIV/AIDS AND INSTITUTIONAL/HUMAN CAPACITY IMPACTS

THE CHALLENGE IN CONTEXT

It seems appropriate but also overwhelming to begin a review of this challenge with the statistics on HIV/AIDS, which continually remind us of the enormity of the problem, particularly in Africa. As of the end of 2003, the estimated number of persons living with HIV/AIDS in the world was approximately 40 million¹³⁴ (within a range of 34-46 million). The proportion of HIV-positive women has been steadily increasing in recent years; in 1997 women comprised 41 percent of people living with HIV but by 2002 this figure had risen to almost 50 percent.¹³⁵ The estimated number of adults and children living with AIDS by geographic region, at the end of 2003, is shown in the following figure.¹³⁶

HIV/AIDS is not someone else's problem. Admittedly, the statistics show that sub-Saharan Africa is by far the most profoundly affected by HIV/AIDS, and the health, and educational, impact will be felt on that continent for generations to come. For African countries, one estimate of HIV/AIDS prevalence ranges from 15 to 40 percent for the population that is 15-49 years of age.¹³⁷ A United Nations report released in July 2004, concurrent to

GEOGRAPHIC REGION	PEOPLE LIVING WITH AIDS
Sub-Saharan Africa	25-28.2 million
South and Southeast Asia	4.6-8.2 million
Latin America	1.3-1.9 million
Eastern Europe and Central Asia	1.2-1.8 million
North America	790,000-1.2 million
East Asia and Pacific	700,000-1.3 million
Western Europe	520,000-680,000
North Africa and the Middle East	470,000-730,000
Caribbean	350,000-590,000
Australia and New Zealand	12,000-18,000

the 15th International AIDS Conference in Bangkok, noted that “infants born now in seven nations (Zimbabwe, Swaziland, Lesotho, Zambia, Malawi, Central Africa Republic, and Mozambique) with high rates of HIV infection could expect to live less than 40 years.”¹³⁸

If as Africans, we do not heed the implications, history may say we have collaborated in the greatest genocide of our time.

William Malegapuru Makagoba

HIV/AIDS, however, is not just an African problem. The overall health threat of HIV/AIDS is increasingly being felt in other world regions as well, with South Asia a key area of concern. According to one expert, “India is our worst nightmare.”¹³⁹ Beginning with an estimate of a few thousand HIV infections in the early 1990s, India was estimated to have between 3.8 million and 4.6

million children and adults living with the disease in 2002.¹⁴⁰ One United Nations estimate projects that between the years 2000 and 2015 there will be 12.3 million AIDS deaths in India, with the projection growing to 49.5 million deaths during 2015-2050. Although the number of people who will die of AIDS in Asia is smaller than in Africa, the absolute numbers are still quite staggering.

The world donor response to HIV/AIDS has been substantial, controversial, and despite best intentions, its critics say, not well coordinated. The United States is by far the biggest national donor through its own \$15 billion relief plan, the President’s Emergency Plan for AIDS Relief (PEPFAR), which grants funds to health groups in 15 countries of Africa, the Caribbean, and Southeast Asia. The plan’s approach, modeled on the experience of Uganda, focuses on

“A-B-C:” “Abstinence”, “Be Faithful”, and “Condom Use”. The focus on abstinence was strongly debated, and defended, at the AIDS conference in Bangkok during July 2004.

The USAID Africa Bureau Education Team has been responding to HIV/AIDS and its effects on education through a comprehensive strategy. That strategy consists of:¹⁴¹

- support to central Ministries of Education for capacity-building for long-term strategic planning and management of the impacts of HIV/AIDS on the education workforce;



- support for skills-based health education and HIV prevention;
- support for innovation in delivery of relevant education to orphans and other vulnerable children, with special focus on HIV prevention and formal and nonformal education, especially for girls.

USAID is supporting this strategy through a broad array of activities and initiatives. A selection of these includes:¹⁴²

- Participation in an Inter-Agency Workgroup on HIV and Education with DFID (Department for International Development, Great Britain), The World Bank,
- Coordination with other USAID Bureaus on HIV impact and prevention;
- Support for Missions building HIV/AIDS activities into all education programs;
- Research on life skills and HIV prevention materials;
- Advocacy for funding;
- Research on innovative strategies to deliver education to HIV affected and out-of-school youth;
- Explorations with teacher professional groups and other new partnerships;

- Documentary on street kids in Zambia;
- Support for country studies on promising approaches;
- Support for Ministry of Education HIV focal persons in Malawi, South Africa, and Zambia;
- Leadership of a multi-donor group on HIV and education in Malawi, Zambia, Namibia, and Ghana;
- Impact assessments in Malawi, South Africa and Namibia;
- HIV policy audits in Ghana, Zambia, Malawi, Namibia and South Africa;
- Community schools in Zambia and Namibia;
- Radio education in Zambia;
- School management board manuals on HIV/AIDS policies for schools in South Africa;
- Community mobilization to support HIV affected pupils in Zambia; and
- Community mobilization to prevent HIV infection among teachers and pupils in Ghana.

While the United States efforts flow through PEPFAR, a major international effort is also taking place through The Global Fund to Fight AIDS, Tuberculosis, and Malaria and a vast array of other

organizations. The Global Fund, founded in 2002, is an independent private foundation, under Swiss law, and is governed by an international board. It does not implement programs directly but rather is a global public-private partnership of governments, civil society, the private sector, and affected communities that attracts and disburses resources, principally through grants, to prevent and treat AIDS, tuberculosis and malaria.

As the amount of funding has risen, however, coordination and duplication of efforts have become obstacles for a variety of complex reasons. One reason, highlighted at the 2004 Bangkok conference, concerns the relationships between donors and recipient countries “as funds and materials are being disbursed at unprecedented rates”¹⁴³ and (in a reprise of previous comments on capacity development) the small recipient government staffs are overwhelmed by paperwork and high expectations. Some countries don’t want the donors to work together, fearing donor control. Lack of agreement among the donors on approaches and key issues is also seen as a reason for delays in implementation and problems of coordination.

There are many dimensions to the HIV/AIDS challenge. These include the institutional impacts of HIV/AIDS, particularly on education, health and research issues, and

the connections between HIV/AIDS and poverty. An examination of critical issues highlights these dimensions.

CRITICAL ISSUES

HIV/AIDS is not just a health concern; it is a complex global problem affecting all sectors of international development work. Currently, international aid organizations are focusing on treatment and prevention. The reality is much broader; however, as HIV/AIDS is causing massive human capital depletion that already is affecting educational institutions and will affect micro-finance and other programs. In 1998, 4 percent of the teachers died in Zambia.¹⁴⁴ As Buff Mckenzie of USAID noted at the “No One Left Behind” conference in 2001, the question becomes: “How are we going to do Education for All when people are dying?”

The impact of HIV/AIDS on the education sector, particularly in Africa, has been profound, multifaceted,¹⁴⁵ and a major obstacle to children achieving universal access to primary education by 2015. It is estimated that the net additional cost to offset the results of HIV/AIDS for the loss and absenteeism of teachers and the demand incentives to keep orphans and other vulnerable children in school is US\$1 billion per year.¹⁴⁶ In terms of supply, demand, and quality, HIV/AIDS aggravates existing prob-

lems in education including shortages of teachers, underscores the inadequacy of information systems, deteriorates the quality of education, and reverses gains that have been made in enrollment. In Swaziland, the Ministry of Education needs to train two teachers to replace every one lost, and this has resulted in an 80 percent increase in training costs. In a 2001 IEQ Study in Malawi, teacher absenteeism was 20 percent and class size had increased to 96 pupils per teacher.

With HIV/AIDS, clearly many people are being left behind, and there is a need for multi-dimensional “capacity-deepening” regarding approaches to dealing with this problem. This development of capacity will be a long-term endeavor, a process not an event, and it will require changes at several levels.

One critical issue concerns the medical challenges of HIV/AIDS, which remain enormous, and the linkages with needed medical research. Since medical research cannot take place in a vacuum, “if the United States is going to advance a research agenda to end the HIV/AIDS epidemic, collaboration with developing countries is essential.”¹⁴⁷ History has shown that the only way to interrupt an epidemic is to prevent it. Vaccines have proven to be the most common and effective means of pre-

vention of many diseases, but vaccines are not the only way. This means that the research agenda for HIV/AIDS must be multi-focused and should not only explore vaccines but drugs, microbicides, behavioral means, and combinations of these potential solutions. The research agenda also needs to be comprehensive and should therefore address unique issues for the developing world such as tuberculosis, malaria, and nutrition. The medical response must also be cautious and observant in other ways. “A massive airlift of antiretroviral drugs, with no plan for distribution or a means to determine the impact and to improve the effect, is a dereliction of duty.”¹⁴⁸

There are, however, even more fundamental issues, and fundamental causes, of HIV/AIDS that require broader and deeper policy perspectives, and significant action.

Governments now face a “trilemma” economically regarding capacity-deepening. First, they need to take a longer-term view of economic and social development. Second, the worsening social indicators require that they devote increasing amounts to short-term (consumption-oriented) activities. Third, with incomes declining, governments should reduce the real tax burden on their citizens by cutting revenue demands. Reversing the downward spiral that is resulting from this trilemma requires a

productivity-improving combination of internal improvements and external assistance. That combination would have to include efforts to reorient activities, improve efficiency (reduce waste), scale back, and carefully use selected technical assistance.¹⁴⁹

The whole connection, or lack of it, between what is mostly an ad hoc international AIDS policy and the “ecology of poverty” is now undergoing intensive and critical scrutiny. Eileen Stillwaggon is one of the most articulate critics on this issue. Dr. Stillwaggon has attacked the “fixation on the proximate cause of HIV transmission (that) reinforces tunnel vision among policy makers and analysts who continue to push for the same kinds of end-game interventions rather than tackling the broad array of cofactors that fuel the spread of HIV.”¹⁵⁰ In a paper delivered at the International AIDS Economics Network Pre-Conference in Bangkok (July 2004), Dr. Stillwaggon observed that:

“poverty is recognized as one of the key circumstances promoting the spread of AIDS and yet poverty eradication is said to be too expensive for countries facing major epidemics. Plans of the international community to spend billions of dollars to prevent HIV transmission fail to get beyond the sex act to address the larger context of disease in poor communities.

Similarly, although it is widely understood that gender relations play an important role in the epidemic, obvious strategies that would directly and immediately change the status of women are not part of AIDS policy. Condoms can be effective in minimizing transmission of HIV, but they are only of use to women who already have some degree of power in their sexual relationships. If now, more than twenty years into the epidemic, we are still doing little more than handing out condoms, when will we deal with fundamental causes, such as poverty and the oppression of women?

The current policy responses were originally conceived in the 1980s in an atmosphere of crisis and prejudice and consequently lack perspective. The problem of AIDS is not a special case; it is just another example of the transmission of an infectious disease in poor populations around the globe. Recognition of that context of poverty is almost entirely absent from the emergency, last-minute measures that comprise global AIDS policy.”¹⁵¹

BEST PRACTICES

In terms of how the education sector (Ministries of Education) does business, best practices generally include one or more of the following:

- incorporate HIV within continuing reform efforts;
- look for ways to train teachers and managers that address radical erosion of human resources;
- explore new ways to deliver basic education in an HIV epidemic environment;
- rationalize education finance with changing supply and demand;
- develop HIV/AIDS sensitive workplace policies for people living with AIDS;
- strengthen and adapt EMIS for HIV relevancy; and
- improve life skills and HIV prevention education.¹⁵²

These best practices are encouraging, but the challenge requires so much more, especially in the education sector, as the pandemic that is HIV/AIDS continues and grows in Africa and other regions.

II

The HIV/AIDS epidemic continues to play an increasing and deadly role in the efforts to improve the reach and quality of education in developing countries. It is reducing the quantity of the educated and the educators, and it is reducing the quality of education overall. HIV/AIDS has created new problems for educational administrators

in the realm of orphans and other vulnerable children (OVC). The trauma of lost caregivers, and the trend towards child-headed households is magnifying an already daunting human challenge. The total number of AIDS orphans since the beginning of the epidemic (in the late 70s) until the end of 2001 was 14 million.¹⁵³

If the implications of the HIV/AIDS challenge for education are to be overcome, THEN there is a need for long-term comprehensive planning and capacity deepening, with explicit attention to fundamental causes such as poverty. Better collaboration and coordination among the wide variety of international agencies would appear to be crucial. To paraphrase one development practitioner, "if HIV/AIDS is a war, where is the war room?"¹⁵⁴ That war room has not yet been developed.

CHALLENGE SEVEN: ABUSIVE CHILD LABOR

THE CHALLENGE IN CONTEXT

The global breadth and depth of child labor as a problem are hard to gauge accurately because of the difficulties in gathering the statistics. It is estimated, however, that of approximately 250 million children between the ages of 5 and 14 who are working, 50-60 million between the ages of 5 and 11 are engaged in intolerable forms of labor.¹⁵⁵ It is known that much of children's work is rural and agricultural, and that domestic work is the largest employment category of girls under age 16.¹⁵⁶

It is important to note that increasingly there is a differentiation between child labor generally and "abusive" or "hazardous" child labor, which includes child prostitution, slavery, bonded labor, child soldiering, drug trafficking, unsafe industrial conditions, and exploited domestic servitude.¹⁵⁷ In just one example of "targeting the intolerable", it is estimated that each year more than 17,000 girls are trafficked across the Nepal border for sexual exploitation.¹⁵⁸

Child labor in its worst forms is abuse of power. It is adults exploiting the young, naïve, innocent, weak, vulnerable, and insecure for personal profit.

**Geir Myrstad
IPEC/ILO**

CRITICAL ISSUES

Defining this problem has often been and continues to be a problem of its own since there are two common definitions of child labor. For a succinct introduction to the problem and the definitions, it is useful and practical to draw upon the publication, "Education to Combat Abusive Child Labor: An Introductory Guide to Policy and Practice".¹⁵⁹ One definition emanates from the International Labour Organization (ILO) and its Minimum Age Convention No. 138. This definition, which views child labor in "terms of economic participation activities contributing to the Gross National Product under the UN System of National Accounts,"¹⁶⁰ stresses child labor as children becoming economically active too young. The focus of the second definition is on children's involvement in work that is harmful to them regardless of age. This perspective is rooted in the UN Convention on the Rights of the Child (CRC) and the ILO Worst Forms of Child Labor Convention No. 182.¹⁶¹

There is now renewed international interest in child labor with the UNICEF, ILO, and The World Bank heavily involved. In 1999, ILO Convention No. 182, the Convention on the Worst Forms of Child Labor, was unanimously adopted and ratified by almost 90 countries, including the United States.¹⁶² This was a significant formal step in recognizing child labor



as an area of international concern. Other players include the U.S. Department of Labor and the U.S. Agency for International Development.

To more fully understand the challenge of abusive child labor also requires understanding four perspectives or policy frameworks, which were outlined at USAID's "No One Left Behind" workshop in 2001.¹⁶³

- A Labor Market Approach. From this perspective child labor is seen as "economic participation that discourages children's development (especially in education) and exposes them to unacceptable risk."
- A Human Capital Approach. Child labor is seen as a consequence of underdevelopment.
- A Social Responsibility Approach. From this perspective, children's work is "part of a system that excludes disadvantaged groups from full participation in the protection, benefits, and opportunities of society. Therefore, the solution lies in stronger families, targeted programs for working children and their families, improved basic services, community monitoring of workplaces to identify and remedy abuses, children organized to

defend their own interests, and political activism to make governments more responsive."

- A Child-centered Approach. In this view child labor is to be valued according to children's interests and welfare, without the filter of adult agendas.

BEST PRACTICES

Each of the major organizational players working to combat abusive child labor has adopted its own approaches, developed its own strategies, and identified best practices. From these varied processes, much has been and continues to be learned.

UNICEF approaches the elimination of child labor through a variety of methods:

- legislation/policy
- sensitization/social mobilization
- advocacy
- research/data/information sharing partnerships
- training/capacity development
- service provision
- monitoring and evaluation
- child participation

Much emphasis is placed on legislation and policy work in addition to

education. UNICEF has delineated the boundaries of abusive child labor to encompass domestic labor as well as abuses in agriculture, industry, trafficking and construction.¹⁶⁴

The fundamental lessons that have been learned by UNICEF include the belief that child labor causes poverty, and that there is a basic need to get good data for research. There needs to be a convergence of services because child labor is not just about poverty. It is also about value systems and abuse. Women's economic empowerment is essential. The age of children also is important; there needs to be protection measures for children between 15 and 17.¹⁶⁵ Taking children out of work is not sufficient; they need a good alternative. In terms of education, quality should be maintained because if it is not, the children will drop out. Schools need to work harder to bring children to school, and educators need to take greater responsibility.

The importance of "quality" as a key characteristic of basic education has been noted earlier in the BEPS study, and UNICEF has also redefined what it believes is the concept of "quality education". Much broader than traditional definitions, it emphasizes the learner as a holistic being with a full range of human rights.¹⁶⁶

UNICEF believes that children have a right to learn in rights-based, child-friendly schools. This means that schools and other learning environments must be effective with children, healthy for children, and protective of children. In addition, education must be transformed so that it is “gender-sensitive” throughout and inclusive to all children.

Mary Joy Pigozzi
Gender-Sensitive Education for Working Children. Improving Both Access and Quality.

IPEC, the International Program on the Elimination of Child Labour of ILO, works to combat the most abusive forms of child labor using multifaceted approaches and collaboration with other organizations. IPEC has been growing fast: in 1992 it only had one donor and six nations with programs; in 2001 there were 25 donors and 70 program countries. The key elements of IPEC’s country programs include encouraging partners, determining the nature of the problem, assisting in development of national policies against child labor, and helping to initiate material for outreach. IPEC began a development initiative called “Time Bound Programs” to eliminate the worst forms of child labor in El Salvador, Nepal, and Tanzania.¹⁶⁷ Since 2001, Timebound Programs were initiated in the Dominican Republic (2002), the Philippines (2002), Senegal (2003),

Indonesia (2003), Pakistan (2003), Brazil (2003), South Africa (2003), Ecuador (2003), and Turkey (2003).¹⁶⁸

The action plan of IPEC includes transitional education and mainstreaming as a part of rehabilitation, vocational training and skills training for older children, improved schools, and alliances to make the prevention of child labor a priority everywhere. IPEC has learned the importance of a number of key elements, including non-formal education as a “bridge,” the importance of social awareness-raising to increase participation, vocational training geared to marketable skills, a holistic approach to education, and teachers as a strong force in the child labor fight.

The International Child Labor Program (ICLP)¹⁶⁹ of the U.S. Department of Labor (DOL) is focused on research, public information, domestic grants, a child labor technical assistance program, and a new education initiative. There were 38 DOL direct action programs implemented through ILO/IPEC during the period 1999-2001. From FY 1995 to 2005, appropriations for the Bureau of International Labor Affairs (ILAB) of the U.S. Department of Labor have included approximately \$292 million for ILO/IPEC.¹⁷⁰

The first steps of the DOL direct action programs are identification

of children engaged in hazardous occupations, then advocacy and awareness-raising programs. It works then for withdrawal of children from abusive child labor situations and towards the empowerment of families. Critical steps related to education are:

- Identify children, causes of child labor, and the barriers to education;
- Build capacity of the educational system to absorb and nurture children;
- Withdraw children and place them in transitional settings;
- Strengthen the capacity of children to succeed in educational settings; and
- Improve the quality and relevance of education.

An important set of lessons has been learned from the education components of the Department of Labor/IPEC projects. These include:¹⁷¹

- Awareness raising and planned withdrawal must be accompanied by preparation of the education system to absorb children.
- Time between identification, withdrawal, and placement must be short.



- Educating child laborers is different from educating children who have not worked.
- Child education assessments are important to ensure correct placement, quality, and progress relative to non-working children.
- There should be a good ratio of teachers and infrastructure to children.
- There is a need to improve teacher involvement and motivation.
- There is a need for more teacher training to implement targeted programs in transitional, nonformal, and formal schools.
- Projects with more parental, community, and Ministry of Education involvement fare better.

The World Bank¹⁷² is relatively new to the issue of child labor. Because of this, the organization is trying to work on child labor issues through strong partnerships with other agencies. Within The World Bank, the child labor team is working to mainstream the issue so that it can be applied in existing projects and integrated at all levels of policy work. Understanding Children's Work is a joint project of the ILO, UNICEF, and The World Bank that was initiated in 2000, and is based

at UNICEF's research center in Italy. The key principles of this project focus on the linking of projects, avoidance of duplication of work, and coordination in moving forward. There are three key objectives: to improve child labor research, data collection and analysis; enhance capacity for child labor data collection and research, both at the local and national levels; and improve the impact assessment of interventions against child labor.

USAID draws its approaches and lessons learned about child labor from a variety of countries and a selection of effective and vibrant programs. USAID's Egypt Mission¹⁷³ has done substantial work in combating child labor. In Brazil,¹⁷⁴ USAID initiated the At-Risk Youth and Child Labor Program to deal with the massive problem of 2.9 million child laborers. Focusing on the extremely poor northeast region of the country, it is employing USAID's child labor strategy:

- Develop research tools to identify working children in informal sectors of major urban areas;
- Remove children from abusive labor situations;
- Place the children in formal schools and in nonformal educational activities;
- Support families through provision of MISA scholarships

and engagement in vocational training, literacy and income generation programs, including access to micro-credit;

- Develop monitoring and evaluation systems to support the implementation of policies targeting working children; and
- Provide teacher and parent training.

In Mexico and Brazil,¹⁷⁵ with USAID support, Missao Crinca ("Mission: Children) uses a strategy called Bolsa Escola. A school scholarship program reduces child labor by putting children in schools. Cash transfers are given to poor families with school-age children. The families agree to keep their children in school in return for the cash transfers. By 2002, 5 million children were in Bolsa Escola programs in Mexico and 4 million in Bolsa Escola programs in Brazil. For the same year it was estimated that 20 million children would be beneficiaries of the Bolsa Escola programs in Latin America.

The Solidarity Center's East African Plantation Project¹⁷⁶ is funded by USAID in Kenya, Uganda, and Tanzania. Key aspects of the program are that it works through the trade union structures, works at the local level, and involves and mobilizes all stakeholders as a team. The results of this effort include over 1,000 children who

have stopped work and returned to school, more children who have stayed in school with a new community and family pride as well as more emphasis on education, and 200 self-help groups that have been formed.

II

The increasing awareness of child labor issues holds the promise of progress in the face of a difficult task. Of all the lessons learned, one of the most important is that while education can do much, it is not a panacea. There is also poverty. There is adult labor. There is the need for women's empowerment. Many of the lessons learned from the cases described here have similar elements, occasionally with different wording. IF there are even more coordinated and focused efforts among the organizational players, THEN there will be even greater hope to eliminate abusive child labor.

CHALLENGE EIGHT: INFORMATION TECHNOLOGY

THE CHALLENGE IN CONTEXT

Is the "digital divide" unbridgeable? That is a divisive contextual question for development thinkers today. It lurks in the background of contemporary discussions about the importance and utility of information and communication technology (ICT) today, particularly for education. The answer to the question should probably not be stated so baldly as "yes" or "no," but more flexibly be broken down into a series of sub-questions beginning with words such as "how," "when," "for what," "why," and "for whom." For many development practitioners there seems to be a positive acceptance that the divide is bridgeable and that the questions do and should principally revolve around how: how to best use ICT (or more commonly "IT" for information technology; all forms of technology, including telephony and computers, used to create, store, exchange, and use information) in the service of education.

In 1900, 24 years after the telephone was invented, only 5 percent of the homes in America were hooked up to the telephone network. In most other countries the figure was negligible. Compare this with the spread of the Internet. In 2000, 18 years after the creation of the rudimentary Internet and 11 years after the beginning of the World Wide Web, 6.7 percent of the world's population were logging on. In other words, the Internet is spreading around the whole world faster than the telephone spread around its richest country a century ago.

The Economist
November 10-16, 2001.

The propulsive, sunny, "can do" perspective on the role of information technology in education garners much support today, particularly when one contemplates the rate at which changes in technology are occurring. It has been observed that information, and communication technology is spreading faster than any technology in human history. According to UNDP in 1998, only 12 percent of Internet users were in non-OECD countries. By 2000, the proportion had almost doubled, to 21 percent.¹⁷⁷

Information technology is also a set of tools that can help developing nations adopt outside technology faster and sometimes develop their own technology. It enables what Thomas Friedman calls "information arbitrage:" to "give and take information from multiple perspectives and weave it together to make sense of the world; a sense you wouldn't have if you viewed it from only one perspective. It is seeing the connections."¹⁷⁸

For all this, the digital divide is currently huge, and the world context



for IT emits a variety of danger signals, some of which will be examined in this review. Many development thinkers are concerned that while the “West gets wired,” poor countries are not only excluded from the internet but also continue to fall further behind as the deals and knowledge that lead to the next generation of IT spring forth from Silicon Valley at lightning speed. The current role, or rather the lack of a role, for women in the information revolution is particularly serious. Gender, politics, poverty, culture, and development priorities are all significant factors at work in the IT context.

CRITICAL ISSUES

Whether by radio or the Internet, IT is making its mark on the world in policy and in practice. As IT grows more and more visible, the issues that it raises are also receiving increasing attention. Interest is burgeoning, and the issues are becoming sharper. For practitioners, the on-the-ground issues and lessons are evolving as clarity and experience grow. For policymakers, the larger issues, some of which have been alluded to previously, remain difficult. A brief survey of the issues here moves from local practice to the wider policy perspective.

For those in the field, the issues facing IT activities are a mixture of the educational, financial and technical. A short selection of these

issues is presented here with the caveat that the issues and concerns are emerging from “works in progress” where assessments and findings are often relatively new and can’t always be generalized among different program types. The issues are grouped here in general categories, highlighting some major field concerns.

EDUCATIONAL ISSUES:

Quality and Access. These are important issues, just as for programs without an IT element. “Good content and pedagogy are vital.”¹⁷⁹ Access depends on the type of program and the technology. Interactive radio in particular offers access to those in greatest need. There is a need for good assessments of quality and access in IT programs.

Training and Learning. Traditional concerns remain for students and teachers involved in ‘mediated learning’; interactive instruction delivered on demand by computer. Both teachers and students need to be trained. This requires computer application skills and more initiative from the students. It also may require the need to build in ‘face time’ with the instructor.

Other. Open to argument, these would include the effectiveness of IT with certain kinds of “non-linear” subject matter; and, depending on the type of IT, the matter of student socialization. The need to use

local content and local languages are also of concern.

COST ISSUES

Cost issues also depend on the type of IT and the methods involved in using it. There may be high startup costs, but if an IT education program is scaled up, there can be long-term savings. Sustainability of these types of programs is a key issue because costs, including staffing, training, and maintenance and replacement of equipment, may often be beyond the capabilities of many developing nations on their own.

TECHNICAL ISSUES

These issues include concerns about the availability of infrastructure, (such as electricity and telephone service), connectivity, the availability of spare parts, maintenance and equipment replacement cycles, training of technicians, and, from a technical point of view, the sustainability of IT systems.

The field issues noted above are reflected in higher-level debates on the use of IT in education. For all of its passionate support and evidence showing the strengths of using IT in education for developing countries, there are also clear signals that there are some important difficulties and gaps.

To put it bluntly, the push for greater use of IT is simply out of touch with the realities of infra-

structure in much of the developing world as well as the sustainability factor linked to the economics of IT. On the one hand, the push for IT in developing nations is laudable. On the other hand, IT also has been called almost irrelevant. The “digital divide” is there, as new telecommunication technologies bypass the poorest countries and, in a swirl of technological passions by “true believers,” there is a lack of focus on financial, political, and even educational priorities.

70 PERCENT OF THE WORLD'S POPULATION HAVE NEVER EVEN HEARD A DIAL TONE

Today, there are an estimated 600 million Internet users in the world. That is an enormous number—yet it still represents only 10 percent of the world's population. Nearly 90 percent of those users are in industrialized countries, with some 27 percent in the US alone. In Africa, less than one percent of the total population—800 million people, has a computer. Forget never having sent an e-mail or used a search engine; 70 percent of the world's population have never even heard a dial tone.¹⁸⁰

***50 Facts That Should Change the World,*
Jessica Williams**

The Oxfam Education Report (2000) provides one of the most articulate expressions of this per-

spective when it observes that “attempting to close the wealth gap through technology transfer is like decorating the top layer of apartments in a skyscraper without taking action to deal with the rotten foundations.”¹⁸¹ Kevin Watkins, the author of the report, expands on this theme:¹⁸²

“Much has been written about the scope for extending computerized learning systems to the poorest countries. Unfortunately, much of it is divorced from reality. The emphasis has been on the creation of international funds to transfer education technologies through partnerships between development assistance programs and private companies. However, many of the poorest countries lack even the most basic infrastructural requirements. Most schools in sub-Saharan Africa and South Asia do not have the electricity and phone lines needed to use computers and access international websites, let alone the financial resources to purchase them. In countries such as Mali and Mozambique, where there are fewer than four telephone lines for every 1000 people, and where per capita student spending at the primary level is less than \$1, the prospects for effective use of new education technologies is limited.”

For some writers, the “future does not compute” for a variety of other

reasons. One crucial reason largely ignored in the passion for technology is that “non-westernized peoples frequently do not read perspectival images (including photographs) the way people do in the United States and Europe. They may see nothing recognizable even in a familiar scene, or else may piece the image together only with painstaking analysis.”¹⁸³ Another consideration is that the medium does have a message; learning on computers primarily promotes linear, rational thinking. Research on left-brain/right-brain thinking has made us aware that some of the most important and creative thinking does not occur via linear, rational paths. Furthermore, many cultures do not follow such paths. This too cannot be ignored.

Another aspect of the digital divide challenge concerns the access of women to information resources. The study, *Gender, Information Technology and Developing Countries*, offers hope and also an important reality check. IT is seen as presenting important and timely opportunities for women: “better economic prospects, fuller political participation, communication with the outside world, easy access to information, enhanced ability to acquire education and skills and to transcend social restrictions.”¹⁸⁴ Information technology is seen as a tool that is of particular importance to poor women because of the promise of increased access to



resources. This hopeful outlook on gender and IT is tempered by a number of harsh realities; IT is not going to be a panacea to surmount the obstacles to women's social, political, and economic development.¹⁸⁵ Access is clearly one obstacle.

While it is difficult to obtain reliable and comparable data on women's Internet use, available figures,¹⁸⁶ by region, show that women constitute 22 percent of all Internet users in Asia, 38 percent of those in Latin America, and 6 percent in the Middle East. No figures were available for Africa. The study does note that most of the women users in developing countries are part of small, urban elites. Factors constraining women's access to IT include "literacy and education (one of two women in developing countries is illiterate), language, time, cost, geographical location of facilities, social and cultural norms, and insufficient computer and information management skills,"¹⁸⁷ and the most important constraining factor is education. The study also notes that although IT is a new field, a "gendered" division of labor is emerging with women being concentrated in end-user, lower-skilled jobs such as data entry or word processing.¹⁸⁸ The study concludes with the advice that "to fully benefit from new technology, women must act as leaders in its development and as agents of

change, using technology to accelerate their economic and social progress."¹⁸⁹ Given the constraints, this will be a daunting task.

BEST PRACTICES

Both the State Department and USAID do much to promote IT policy in development and international education.¹⁹⁰ The strong support for IT in policy and practice rests upon a basic assumption—that the broad nature of IT enables it to address an array of economic, cultural, and political issues. It can maximize opportunities. For business, IT is efficient and economical. It can help with health care and other social sectors. It has the capability to profoundly change the relationship between governments and their citizens. IT is a cross-sectoral tool and it plays on the strength of the United States in this field.

Information technology is one of the five crosscutting objectives of the USAID Strategic Plan. For diplomacy and development, the State Department and USAID have worked together to bring the Internet to Africa through the Leland Initiative.* The internet is an important element of the Economic Development Initiative,[†] with USAID the prime implementer of this program to which 21 countries have signed an agreement. The Telecommunication Leadership Program[‡] also provides

IT experts for development activities using USAID funding and State Department expertise.

Also reflecting the cross-sectoral nature of American IT policy, The DOT.Com Initiative (Digital Opportunity through Technology and Communication Partnerships) has three major parts:

- **DOT.GOV** develops policy to design regulatory environments that foster private, market-based, telecommunications industries and Internet access. DOT.GOV fosters the use of IT to create more efficient governments and encourages the use of IT to stimulate interaction between citizens and their governments.
- **DOT.NET** is a program to expand access to the Internet in under-developed and under-served areas, and to incorporate IT use in education, democracy, and governance, health, environment, and economic growth programs.
- **DOT.EDU** encourages the use of IT in education, especially in teacher training.

The aim of a second United States government effort, the E-Government Initiative, is to transform the relationship between citizens and their governments by fos-

* The Leland Initiative is a five-year, \$15 million U.S. Government effort to extend full Internet connectivity to 20 or more African countries.

† The Internet for Economic Development (IED) Initiative was launched in 1998 to help accelerate the spread of the Internet and electronic commerce in developing nations.

‡ The Telecommunication Leadership Program (TLP) is a USAID-State Interagency Agreement (IAA) that serves as a worldwide mechanism for telecommunications policy and regulatory reform assistance. It helps to provide assistance in breaking down barriers to private sector investment for the improvement of telecommunications infrastructure.

tering greater accountability, providing more efficient delivery of services, and increasing the communication between citizens and their government. On the international level, USAID is helping to shape IT policy for The World Bank and the United Nations. In partnership with the G-8, it is helping to establish appropriate IT policies, fostering local capacity building, and conducting an economic readiness assessment.

USAID is also supporting a wide range of educational activities in developing nations that make extensive use of IT. Selected activities are as follows:

ProlInfo, in Brazil,¹⁹¹ is a decentralized national program to improve education by integrating the use of IT into teaching and learning in the public school system. Initial indications of impact show that attendance is improved, teaching is more interactive and learning centered, and learning is more intense and learner-driven. The challenges facing the program include the measurement of impact, the promotion of new teaching methods, continued growth, and sustainability.

Proyecto "Enlace Quiche"¹⁹² in El Quiche, Guatemala is strengthening the cultural identity and bilingual education in Mayan communities through the use of IT. Education about technology is taking place through the learning of computer applications while reinforcing

Mayan language and culture. Education with technology is occurring through the use of CD ROMS for learning to read and write in local languages and through the development of electronic grammar books. Education through technology happens as teachers are integrating technology-based activities into the curriculum and as students use the technology to create print and CD-ROM bilingual educational materials.

The Net\Work Project¹⁹³ in South Africa is developing distance education capacity at Vista University, an historically disadvantaged institution with seven campuses in three provinces. The other primary partner in this project is Prince George's Community College in Prince George's County, Maryland. Other partners include The College of Southern Maryland, Africare, and the Public Broadcasting Service/Adult Learning Service. The proposed response to Vista University's needs was to provide distance education training for Computer Science faculty, the piloting of a computer literacy course in distance learning (DL) mode, faculty participation in a web-based Internet Literacy course in order to learn to teach web-based courses, and internships for Vista University students with IT companies.

Community Internet Centers and Schools, established through the

USAID-sponsored LearnLink project,¹⁹⁴ seeks to explore appropriate telecenter models for sustainable public access to IT. The types of telecenter models include the "Adoption Model" in which a center foundation is sponsored by a local NGO and operated on a not-for-profit basis; a "Municipal Model" in which the center is subsidized by government funds; a "Commercial Model" in which cyber-cafes are created by local entrepreneurs as a profitable business; and the "School Model" in which the centers are operated by local school headmasters as computer labs. Examples of LearnLink Projects are Amica@s in Asuncion, Paraguay, LTNNet in Brazil, a teacher-training center in Morocco, and an IT-enabled bilingual teacher-training program in Guatemala. The challenges for LearnLink projects include limited community awareness, unreliable connectivity, security and operating costs, future planning that is not obvious to managers, and the finding that educators are not entrepreneurs.

GreenCOM is an initiative for global environmental development, and it makes use of IT for purposes of environmental awareness.¹⁹⁵ It also supports the GLOBE (Global Learning and Observation to Benefit the Environment) program. In Jordan, GreenCOM has worked with USAID's Asia and Near East Bureau to help a local NGO provide training for 20 teachers for the



GLOBE program. In Russia, GreenCOM works with the Europe and Eurasia Bureau in an initiative to bring access to the Internet to Central Russia. In this effort GreenCOM is paired with a pedagogical institute in the city of Perm in the Urals. Staff have worked with the GLOBE program there to train teachers for the program and provide ongoing support for the teachers.

GLOBE¹⁹⁶ is an international environmental education program that brings together teachers and students to enhance environmental awareness and contribute to the scientific understanding of the earth. It also supports improved achievement in science and math through hands-on, inquiry-based education programs in primary and secondary schools. Begun in 1994, the program is now in 95 countries in 10,000 schools with 15,000 teachers trained. An independent evaluation determined that the program has had a positive impact on student learning and performance, that students have improved higher order thinking skills, and that teachers have higher expectations for students. GreenCOM, in coordination with GLOBE, is promoting environmental education via the collection of scientifically collected data. Information technology is being used to report the data through the Internet and to access the GLOBE web page.

Interactive radio instruction offers a different and somewhat simpler avenue for the use of technology in education, and its supporters are as equally enthusiastic and passionate as those working with computers and the Internet. There have been stages or 'waves' in the use of radio for educational purposes.¹⁹⁷ Prior to the 1970s (the first wave) its major purpose was to supplement basic classroom instruction. The second wave occurred in the 1970s when radio instruction filled the needs of students who were being left out of the expansion of basic education due to lack of funding and trained teachers. The third wave is happening now, fulfilling the needs of students who were once a part of existing traditional education systems that have broken down. For many students, radio is now becoming the primary means of instruction.

Interactive Radio education programs are now supported by USAID in a wide variety of countries, including:¹⁹⁸

- In Haiti, interactive radio is part of the Education 2004 program, an initiative that is providing instruction for language arts in Creole, three lessons per week in reading, and four lessons per week in mathematics.
- In Guinea, interactive radio lessons for French and mathe-

tics are taught for grades 1 through 6 every day.

- In Honduras, interactive radio is reaching the out-of-school, post-primary students; these are unemployed youth that are posing potential social problems. Lessons are provided to grades 1 to 9, but the primary emphasis is on grades 7 to 9.
- In Zambia interactive radio was begun as a part of the country's commitment to Education for All and is therefore designed to reach the poorest students who do not have access to formal education opportunities (there are currently 800,000 children who do not attend school). The pilot phase of the program began with 22 learning centers in the summer of 2000, using locally available materials and selected untrained teachers to save money. With USAID funding the centers have been so successful that they will be increased to 300 next year. There are risks associated with this program however. These include doubts about the sustainability of the program and whether mentor teachers should continue to be unpaid and uncertified. There is a danger of the program going too fast too soon.

There is also the issue of not using indigenous languages since broadcasts are currently in English.

II

Information technology is full of promise. In many ways education and IT are made for each other. In other ways IT brings with it so much covert baggage. IT is, however, here to stay and as the world becomes more global and connected, it is poised, via a variety of technological approaches, to play a major role in education for developing countries. It is important to recognize the assets and opportunities that come with IT but also to balance sometimes overly optimistic viewpoints on the subject with thoughtful reality checks. IF we can move forward with a balanced perspective, THEN IT may become an essential factor in achieving Education for All.

CHALLENGE NINE: USAID'S GLOBAL DEVELOPMENT ALLIANCE (GDA)

THE CHALLENGE IN CONTEXT

Change is the key context for this challenge. The world of change that has occurred during the past 100 years has wrought respondent change, summarized earlier, in how educational development takes place. The past 20 years in particular have brought unprecedented social and economic upheaval worldwide for every nation and every level of society. For some the impact has been positive, while for many others it has been decidedly negative. Globalization has led to major changes in the expectations of business and governments. Civil society has been and is being strengthened as community or issue-based organizations help to expose bad practice and strive to protect the interests of those on the margins of society.

The "assistance environment" for education has changed. The challenges continue to grow as do populations. Although initiatives such as Education for All have brought greater attention to education and its importance worldwide, the resources for assistance have been and are scarce. The organizational environment for assistance has changed over the past 20 years. Prior to this period, the prin-

cipal organizational actors on the development stage were multilateral development banks, international organizations, and governments. Gradually, other actors have joined the mix including NGOs, PVOs, foundations, cooperatives, corporations, the higher education community, and individuals. Each of these players has brought new ideas and innovations, and new approaches. It is a rich environment in terms of alternative development solutions.

It is also an assistance environment that is full of complexity: complex inter-relationships tackling complex development challenges. As Mark Malloch-Brown, the Administrator of the United Nations Development Programme (UNDP), noted in a March 2001 speech entitled, "Bridging the Globalization Gap," "None of the world's problems lend themselves to one-shot solutions. We are forced into complex solutions. Multiple solutions are required."¹⁹⁹ Mr. Malloch-Brown was in Washington, DC for this speech and was making a case for development partnerships.

The Global Development Alliance (GDA) as announced by U.S. Secretary of State Colin Powell on May 10, 2001 is an initiative by USAID to identify and work with partners in order to leverage resources and expertise. It is significant because it recognizes current development assistance realities



Table 7
Models/Activities for the Global Development Alliance

ACTIVITY/ MODEL	CHALLENGES AND PURPOSE	STRATEGIES	PARTNERS
<p>Global Alliance to Improve Nutrition (GAIN)207</p>	<p>Purpose: Improving nutrition in developing nations through food fortification.</p>	<p>Make competitive grants to developing countries in support of food fortification initiatives and other sustainable micronutrient interventions. Options are:</p> <ul style="list-style-type: none"> ● mobilizing private industry, international donors and U.S. foundations in support of food fortification; ● working with multi-laterals; ● mobilizing NGOs and civic organizations to increase demand for fortified food; ● tapping expertise of the corporate sector in technology transfer, trade, and business development; ● utilizing public sector capabilities to address legislative and regulatory barriers. 	<p>Currently being formed.</p>
<p>Global Development Alliance: Information and Communication Technology for Africa208</p>	<p>Purpose: Strengthen access to and use of new information and communication tools to accelerate economic and social development.</p> <p>Challenges: anti-competitive policies and immature regulatory capacity.</p> <ul style="list-style-type: none"> ● severe shortages of skilled IT workers. ● limited infrastructure. ● obsolete equipment. 	<p>Mini-Alliances already initiated. Facilitated by the USAID Leland Initiative, the mini-alliances have been:</p> <ul style="list-style-type: none"> ● establishing the Makerere University Internet Backbone (Uganda). ● training computer-networking specialists in nine countries. ● through distance learning technology, helping to train policy makers and staff in the emerging regulatory agencies of Southern Africa. ● assisting University of Rwanda's Computer Science Department in establishing internet connectivity in surrounding schools. ● providing equipment, software, and training for National Internet Gateways in Mali, Cote d'Ivoire, Guinea, Madagascar, Mozambique, Rwanda. 	<p>Avaya, Hewlett-Packard, Schools-on- Line.</p> <p>Cisco Learning Academies</p> <p>Cisco Learning Engine</p> <p>U. of Rwanda, U. of Maryland, Lucent Foundation. Sun Microsystems.</p>
<p>Certified Forests International Markets Alliance 209</p>	<p>Challenge and Purpose:</p> <p>To close the gap in current market demand for certified forest products.</p>	<p>Increase the supply of certified forest products from developing countries through such activities as:</p> <ul style="list-style-type: none"> ● development of producer associations; ● strengthening forest policy reform; ● linking buyers to producers. 	<p>Still at an early stage:</p> <ul style="list-style-type: none"> ●USAID ●Industry ●Certifiers ●Foundations ● Investors ● NGOs ● U.S. Forest Service <p>Participating countries and areas may include: Brazil, The Andean Region. Central America and Mexico, Philippines, Indonesia, Uganda, Eastern Europe, Russia, the Congo Basin Region, Guinea, Kenya.</p>

and because it is seen as USAID's business model for the 21st century.

The GDA is an effort to make the ongoing work of USAID, through alliances, more strategic, to draw upon best practices, and to produce results that are pleasing to all of the partners. It looks for opportunities where relatively small amounts of risk or startup capital can be carefully invested in the achievement of overall objectives, much like a venture capital partner. Unlike venture capitalists, however, USAID will not take equity positions or seek early exits from activities in which it invests. Sustained improvement over time will remain a prime objective.

The fact is we are not the only development partner in town anymore. We aren't even the biggest player in many sectors. Religious institutions, NGOs, private foundations, universities, private companies, all provide "foreign assistance." The goal of the GDA is to reorient how AID sees itself in the context of international development; how we relate to our traditional partners and how we seek alliances with new partners.

**Andrew Natsios
USAID Administrator
Speech to the "No One Left Behind" Workshop 2001**

CRITICAL ISSUES

There is a veritable laundry list of risks and potential obstacles for the GDA's designers and implementers. Some are generic warnings that apply broadly to all partnerships while others focus specifically on USAID. They are presented here in the form of questions for consideration:

- How will the partnerships deal with communication difficulties among the partners?
- How will the partnerships deal with decisions relating to the equality of partners?
- Who will be the beneficiaries of the partnerships?
- What are the constraints on the parameters of partnerships due to differing agendas?
- What will be the internal bureaucratic obstacles for all the partners? What obstacles specifically face partnerships in which some partners relinquish some control?
- How will money be moved within the partnership? For USAID, an alliance is not a normal mechanism for moving money.
- How field-driven will the partnership be? A unique strength of USAID is field presence and its capability to

generate local alliances, but the GDA is not yet field driven.

An important issue is how to reconcile public sector and commercial goals. It has been recognized that private sector firms want to make money. How they make their money is a concern to USAID. Forming alliances with firms who do not have the best of reputations is recognized as a "risky business."²⁰⁰ Concerns relating to the environment (especially air and ground water pollution) and labor abuses, including abusive child labor, teeter on the cliff edge of development ethics. Private sector firms also have their concerns in these potential partnerships since many of them have not had good experiences in working with public organizations and NGOs; government (and international) agencies are not regarded as very efficient.

Time and flexibility seem to be two key factors identified as important to the potential success of partnerships such as would occur under the GDA. The hardest part of forming alliances is the time needed to reach out to partners in order to find out what organizations are interested and what they might want to contribute. Waiting for all partners to work through their own bureaucratic processes can also be time consuming. The increasing call for long-term vision



and implementation goals in international education rubs up against both short-term (and some would say) shortsighted desires by both governmental bodies and the private sector to see fast dividends in the often messy world of development. Aside from taking the time, flexibility is also seen as a basic solution to the challenges of alliances and partnerships. “If we are willing to take risks and adjust our mechanisms, then it’s going to work.”²⁰¹

A study (Levinger/EDC 2001)²⁰² examining the experiences of twelve intersectoral partnerships (ISPs) in Latin America that received grant support from and were deemed successful by the Inter-American Foundation, identified the challenges the partnerships faced and the benefits they generated. The partnerships studied included NGOs, local (basically municipal) governments, private sector businesses, government agencies, and community-based non-profit organizations.

Of particular interest was that the Levinger/EDC study chose to break away from much of the existing literature on partnerships to focus on partnership functions and outcomes rather than structures. An important and early finding of the field research was that “the most successful partnerships do not have formal hierarchical structures,”²⁰³ nor were they even bound by legal

contracts. Rather, these partnerships were built on strong trust that ensured accountability among participants. “The openness of such arrangements enables individual partners to flexibly draw on the complementary skills present in the partnership so that each entity can make significant contributions to the common goal—even as circumstances change and new needs arise.”²⁰⁴ A new conceptual framework for the study of partnerships, based on functions, was proposed. Five key domains of partnership activity were identified:

- **Service Delivery:** social and economic activities undertaken at the grassroots level with full participation of the poor.
- **Human Resource Development:** often described as “empowerment”, this activity generally focuses on building skills of disadvantaged people and/or personnel in organizations that partner with them.
- **Resource Mobilization:** the process of securing the financial and technical support required to carry out such project-related functions as service delivery, training, research, advocacy, evaluation, and dissemination of lessons learned.
- **Research and Innovation:** the activities that help local peo-

ple and the development practitioners who work alongside them to test and assess new ways of responding to priority needs and problems.

- **Public Information, Education and Advocacy:** these are activities that build upon research and field-based experience along with service delivery. Often there is a policy-oriented element to advocacy.²⁰⁵

To maximize partnership benefits, the togetherness study of Levinger (“How Governments, Corporations, and NGOs Partner to Support Sustainable Development in Latin America”) advocates the “3-Cs” to create a value-added dimension:

- **Continuity:** Continuity occurs when partners “extend their menu of services or activity domains, (thus creating) new opportunities for the poor to continue using skills and competencies gained in earlier development efforts.”
- **Comprehensiveness:** “Multiple activities of the partnership, whether in one or several domains, expand the likelihood that meaningful benefits will accrue to the marginalized and vulnerable.”

- **Coordination:** “Awareness of, and collaboration with, other development actors in the community allows partners to achieve better coverage, develop more cost-effective programs, create economies of scale, and build social capital that can be applied to new development challenges.”²⁰⁶

The focus on functions in partnerships and the presentation of the functions and value-added dimensions in a coherent form would appear to offer an important filter through which partnerships, including the GDA, can be analyzed and designed.

BEST PRACTICES

There are development activities that can act as models for and responses to the call for the GDA. Three examples of such activity/models are presented in Table 3. Each activity/model focuses on a different development sub-sector; has different purposes, and uses strategies relevant to the activity. Each has brought together, or is currently bringing together, different types of partners in order to respond to specific development problems.

Despite the positive models and practices, implementation of the GDA must address a variety of difficult issues and questions before it becomes an effective reality. Many

of the issues related to implementing and, even more importantly, sustaining partnerships have long been identified in the development literature (old lessons not yet learned).

II

Progress is being made in defining (or redefining) how partnerships, particularly those focusing on sustainable development, can be successful.

Partnerships like the Global Development Alliance are part of the new development paradigm. The GDA deserves the full opportunity to be developed, nurtured, and managed systematically. It will require a partnership broker; the taking of risks in the face of obstacles, professional and political willpower; provision of adequate resources, a long-term vision, the strategic selection of partners, flexibility, a lot of patience, and a lot of trust. IF these occur, THEN partnerships are more likely to flourish.

As observed in the concise and useful book on brokering partnerships, *The Guiding Hand*:

“Successful partnerships for sustainable development do not have to be left to chance. They can be developed, nurtured and managed systematically when a skilled individual acts as the partnership’s “broker,” steering and supporting the process and leading the partnership to maturity and operational independence”.

Ros Tennyson and Luke Wild

The Guiding Hand: Brokering Partnerships for Sustainable Development.



**"For in and out, above, about, below
'Tis nothing but a Magic Shadow-show.
Play'd in a Box whose Candle is the Sun
Round which we Phantom Figures come and go**

**The Rubaiyat of Omar Khayyam
Persian Poet**

IV. LOOKING INWARD

Is international development in its current state “nothing but a Magic Shadow show”...around which we phantom figures come and go? If no one is to be left behind, where are we as international organizations, both big and small, and as a system, however loose?

At times, despite the best of intentions, lessons learned, and cases of success, it seems like international development organizational players are suffering from a severe case of St. Vitus's Dance,* flailing and twitching at growing problems with severely limited resources. A few moments of introspection are warranted at where we are overall: systemically, organizationally, globally, internally, politically, and spiritually.

Looking Inward is asking for a moment to pause, briefly, and look at development organizations from a different perspective, focusing more on what they are in their inner workings rather than what they do. The review of the nine challenges examined how the

development community is looking outward at global problems and solutions. Only looking outward at the progress and the problems that are occurring as the world struggles to leave no one behind in education is like seeing only one dimension of a three-dimensional chess game. The progress is gratifying though muted by the problems, but the picture is decidedly incomplete.” As the Vietnamese philosopher Thich Nhat Hanh has observed, “When we are capable of stopping, we begin to see.” There is deeper seeing to be done.

Why bother to look inward at the functioning of international development organizations? How is this relevant to the nine challenges? The challenges are basically the content of current efforts in international development education, coupled in part with the process of those efforts. The actors in the development drama, the focus of looking inward, are the international organizations, governments, and individuals that are attempting to implement policy reforms. The

actors, the processes, the content, and the educational environment (culture, language, politics) are all key elements in this drama; a holistic perspective is valuable to understand education, policy, and reform.

There are four elements of this effort to look inward:

- ***The State of Affairs.*** What, in brief, is the status of international development and education, as implemented by key actors—the development organizations and their personnel?
- ***Developing International Development Organizations.*** What are the key trends in twenty-first century organizations, and how may these trends affect international development education institutions?
- ***Paradigms: New, Old, Lost, and Found.*** There is a call for new paradigms for development organizations such as USAID. This new call reflects

*The term St. Vitus's Dance comes from a form of hysteria that was widespread in Europe in the 1500's. Persons with this condition often visited shrines of St. Vitus to seek cures. St. Vitus's Dance was also the former name for a condition called chorea, associated with rheumatic fever in children. Symptoms of chorea include the uncoordinated movements of the face, limbs and body.

efforts at defining, or redefining, the paradigms of international development education. What are the paradigms—new, old, lost, and found—that may affect the responses to the nine challenges?

- **Learning to be Learning Organizations.** Emphasizing the need to bring together the fields of management, organizational development, and international education, what are Learning Organizations, and how and why is this concept relevant to the organizations working in international education today?

THE STATE OF AFFAIRS

First is the state of international education affairs. In capsule perspective, governments and the major international donor organizations focusing on education are struggling to regroup, restructure, refocus, reinvent, find niches, and in many cases downsize their organizations. A short reality check follows. In no way is this shortlist intended to be cynical. As with Education for All, it is time to “do the math,” and the math is not just about money.

- **Financial Commitment.** Foreign aid is suffering from various sorts of “arterial plaque.” Mark Malloch-

Brown, the Administrator of UNDP, speaking in Washington, DC on the need for partnerships in March 2001, gently chided the nations of the world, including the USA, on their lack of financial commitment to foreign aid. He noted that only four countries met the international goal of devoting 0.7 percent of their national budgets to international development: three Nordic countries and the Netherlands.²¹¹ This remains true despite major increases in the dollar amounts of American government foreign assistance in the past several years, and despite the admirable outpouring of American assistance for victims of the 2004 tsunami in Asia. Although it is difficult to obtain accurate figures on international private giving, it is important to note that private aid/donations by American individuals and organizations (from foundations, charitable giving by businesses, religious overseas ministries, universities and colleges, personal remittances) add major resources to overall American assistance. By one calculation, however, even if public and private foreign aid were combined, American assistance still amounts to less

than one percent of gross national income.²¹² The ongoing debate on the amounts, types, and percentages of foreign assistance is heated, full of nuances and intricacies, and is not going to be settled here.* Suffice it to say that more needs to be done.²¹³

- **Refugees and Government vs Private Funding.** As the number of refugees and displaced people from various conflict situations increases (in August 2001 the numbers were estimated to be 22 million worldwide), the United Nations High Commission for Refugees (UNHCR) cut its 2001 budget by over \$100 million to \$862 million. It then began cutting 800 staff members and closing down nine offices, including seven in Africa. Noting that UNHCR could do a better job at raising money than it does, an Economist (August 2001) article suggested that the agency would do better to seek private money (for example, UNICEF, derives a third of its \$1 billion dollar budget from private sources).²¹⁴
- **The World Bank.** The World Bank is the biggest international player in education and social development. The Bank

* For a particularly interesting and enlightening analysis of the 'sides' of this topic, see the transcript of an actual debate between Carol Adelman of the Hudson Institute and Steve Radelet of the Center for Global Development. Held in Washington, DC, January 13, 2005, the debate was co-hosted by the Hudson Institute and the Center for Global Development. The transcript of the debate, U.S. Aid: Generous or Stingy?, is available at CGDEV.ORG.

pledged at Jomtien (1990) to double lending to education. To its credit, it achieved that goal. From 1993 to 1998, the Bank averaged \$1.9 billion per year, with basic education accounting for 40 percent of this amount. The countries with the largest education deficits, however, experienced slower growth in Bank assistance, and soft loans from the International Development Association to low-income countries were lower in 1998 than in 1990.²¹⁵ Despite impressive efforts to add social dimensions to its policies, the Bank has been criticized for its structural adjustment programs as leading many countries into overwhelming debt situations. The Bank itself has undergone a series of “restructuring” exercises internally over the last decade that have left talented staff members overworked, demoralized, and departing. Fractious infighting over the Bank’s overall direction has slowed the institution’s intent to reinvent itself and become more agile. The Bank’s poor record in evaluating its efforts has been previously noted.

Other major players include the following:

- **UNICEF** has become a respected leader in education

in the decade since Jomtien but it has been “relatively lax in systematically documenting the impact of its work.”²¹⁶ Thus there is “little formal evidence of either cost or the effectiveness of its projects.” Furthermore, only a few of its initiatives have been adopted and continued by other international agencies after UNICEF’s initial piloting.²¹⁷

- **UNESCO** has the international mandate for education and coordinated the EFA 2000 assessment, but the organization is weak on the ground. As a result, other agencies have often taken the lead on education in its place.
- **UNDP**, after preparing a strategy on education in preparation for the Education for All conference in Dakar (May 2000), basically ‘switched gears’ and decided to limit its focus on education (‘bailed out’ in the words of one staff member) and instead emphasize democracy and governance.
- **USAID** has proven to be highly adept at adopting “niche” strategies, in part out of financial necessity, that complement the work of the major players such as the Asian Development Bank and The World Bank. The agency has managed to accomplish

much quality work as it has struggled to survive. It has supported the Education for All initiatives through its emphasis on improving access, quality, and equity in those countries in which it works. Nevertheless, access remains a major issue in these countries, as does quality.

Despite its targeted successes, with lessons learned carefully recorded, USAID, like the other international agencies, struggles with funding constraints and convoluted bureaucratic processes. Capacity limitations over the past decade—reductions in force, attrition, and hiring freezes—have affected the ability of USAID to guide large and complex education reform programs.²¹⁸ Its staff depend more and more on contractors to fill staff roles, leading to financial savings and efficiency but also to murky and awkward arrangements on information sharing and communications among the contractors. It also has had difficulty in effectively communicating to the U.S. Congress what it does. Announcing that the “old paradigm” of development is out, the agency is now looking to partnerships with other international organizations and with the private sector to lift its effectiveness and its spirits.



DEVELOPING INTERNATIONAL DEVELOPMENT ORGANIZATIONS

Guy Benveniste, one of the premier thinkers on planning and organizational development, has observed that six trends are shaping twenty-first century organizations in general. These trends are also important for international development organizations today. The first four trends are as follows:²¹⁹

- International competition for new ideas in the world economy, including a dramatic internationalization of research and development, with impacts on both public and private organizations.
- the continued upgrading of the educational and training qualifications of part of the work force,
- growing numbers of women in the workplace,
- advances in new technologies, particularly in communication and information.

These four trends give rise to two additional ones:

- an accelerated rate of change that results in change itself being institutionalized, and
- a new concept of the organization, growing partly out of

the tendency of government and the private sector to work together in vastly expanded networks.

From these trends Benveniste draws many lessons and themes that can be and need to be applied to twenty-first century organizations working in international development. Benveniste sees as important a “theme of decentralization and empowerment and the consequent need to still be able to bring efforts together, mass resources, and act purposefully.”²²⁰ Fittingly, the current trend in international organization rhetoric, as finances decline, is toward partnerships and collaboration—a positive sign that awaits fulfillment.

Another lesson and theme is that the large organization, including large international organizations, will live on. All the new technologies are not going to cause organizations to wither away, observes Benveniste. “On the contrary, the creation of an international economic order based on competition is bound to vitalize an organization.”²²¹ The creative individual—like the writer who works at home and communicates electronically—will be linked through complex and inter-related sets of organizations. Organizations are not going to disappear, and two trends are occurring and will increasingly occur.²²² Organizations will decentralize so that more and more of what mat-

ters are smaller subsets of organizations, the merging new spin-offs, and the creative milieus in which these organizations operate. The second trend, already happening, is that women’s full participation in the organization implies radical changes in life-styles. As women and men participate fully in the organization, they bring their families with them to the workplace.

A final, selected theme from Benveniste, based on the trends he has identified, is that he foresees the emergence of feminine management styles as an important development. “Current research indicates gender similarities in managerial style but also shows that women tend to be thought of as the ones who listen more, treat others as equals, share information, and maintain trust relations.”²²³ Benveniste’s last trend, “a new concept of the organization, growing partly out of the tendency of government and the private sector to work together in vastly expanded networks,” is now fortuitously being discovered at the international level, as international development organizations slowly dance toward partnerships. For international organizations, and for the world full of sustainable livelihoods, these lessons have profound implications.

The perceived legitimacy of international institutions is increasingly being called into question, and it is a subject that cannot be ignored.

International economic organizations in particular are attracting large crowds of protesters wherever the organizations have major meetings, with the protesters bringing a wide range of complaints. Of all of the complaints, however, the one that receives the most attention concerns globalization and in particular how it is destroying democratic institutions. This has been called “globalization’s democratic deficit.”²²⁴ This idea suggests that fundamentally “we the people” at the local level really have insufficient voices at the global level.

There is no clear and easy answer to this problem, whether perceived or real. One possibility could be greater accountability, even if indirect, of international organizations to governments. “The IMF and The World Bank should be held to a higher standard than domestic institutions,” states Joseph Nye, who also believes that increased transparency at the international level is also an element of the process to improve the legitimacy of international organizations.²²⁵ The international organizations can provide more access to deliberations. NGOs could have a role in this increased access, but NGOs themselves need to have the same standards of transparency applied to them. Nye suggests that an NGO such as Transparency International could encourage this movement.

PARADIGMS: NEW, OLD, LOST AND FOUND

Andrew Natsios, Administrator of USAID, has said that it is time to move away from the old paradigm of development, with greater emphasis on the development of various sorts of partnerships. Others also have examined the paradigms of how international organizations and development in general should operate, found them wanting, and proposed new ones. These paradigms—new, old, lost, and found—continue to influence how the development community or the ‘development business’ approaches such challenges as basic education, HIV/AIDS, and abusive child labor.

Operational paradigms for development and education are being re-examined in the face of the mega-perspective that the global south of low-paid workers struggles to survive while the global north grows richer on knowledge-based occupations. It is hard to ignore lost paradigms when the United Nations (in 1997)²²⁶ found that at least 100 countries were worse off than they were 15 years previously and that the “combined income of 3 billion people in the developing world is less than the assets of 358 multibillionaires.”²²⁷

Looking at development paradigms, Michael Edwards is optimistic as he reflects on current paradigms in his book, *Future Positive: International*

Cooperation in the 21st Century, but he also notes lingering memories of old, and not so old, paradigms. Despite some moves away from “projects”, with USAID now focusing on “activities” connected to programs through Strategic Objectives (SO) and Intermediate Results (IR), development education still takes place through “projects.” “A world without projects is inconceivable for many aid workers because they offer a controllable delivery system for foreign funds,”²²⁸ observes Edwards. “They provide the perfect framework for a mechanistic vision of development based on inputs and outputs—a security blanket for a system that lacks the trust to give money without strings attached and the confidence to hand over control.” Noting a wide variety of aid disasters ranging from World Bank projects to those of international NGOs, Edwards asks what breeds success and what are the real issues with projects. He sees three deep lessons of why project aid is often ineffective:²²⁹

- Too much focus on narrow goals and standard solutions. “Successful projects are the ones that strengthen local capacities to identify problems, suggest some answers, and develop the support base to push them through in the face of opposition from vested interests.”



- Winning short-term gains on the basis of heavy external inputs is not difficult; what is difficult is sustaining them against the background of weak policies. So, as a general rule, successful projects build broad-based demand among the population for improvements in governance, higher-quality services, and the produce and skills of poor people.”
- The right sort of help. “That help must be flexible, sensitive, strategic, experimental, and achievement-based. Small successes are better than large failures.” “The tunnel vision of the project system focuses too narrowly on the short-term and the easily measurable, squeezing out the broad-based, social, and institutional changes that are vital for sustainable results.”

Heavily administered projects and activities, tend to have a poor record in tackling the real issues in development. A prime example cited by Edwards, who observes that donors are always changing their minds on the basis of fashion or short-term disappointments, relates to efforts in combating HIV/AIDS.²³⁰

“According to Tony Klouda, one of the world’s leading authorities in this field, HIV/AIDS projects

provide a classic case of this general malaise: messianic fervor being followed by intensive action planning; a gradual recognition that the issue is much more complex than first thought, a proliferation of special programmes to deal with the complexity, growing disillusion when they don’t work, more new programmes and more disappointments, and finally a return to business as usual.”

The dangers, concludes Edwards, are many. Donor agencies often see NGOs as instruments of government policy. This impression often threatens NGO independence and flexibility to choose different roles as well as poses questions about social contracts between states and citizens over time as ruling orthodoxies prefer privatization in economic and social life.²³¹ The danger is that countries can become “aid dependent.”

Thomas W. Dichter, in his critical book, *Despite Good Intentions*, says development assistance to the third world has failed and it has failed for a variety of reasons, not the least of which is “avoiding history” i.e. avoiding the lessons that economic achievement depends on the conduct of people and their governments and that no one thing works by itself. First, he says, “the keys to development are mainly in the hands of the developing nations themselves and far less in the hands of outsiders, and second, development is not the same thing as outcomes.”²³² He severely faults the “production/engineering model” of development assistance; the very same model that comprises the everyday work of a myriad development assistance consulting firms. “By dividing up development into tasks that can be planned, budgeted, staffed, and implemented by experts, the production/engineering model makes it easy for almost everyone in the (development)

“You don’t solve problems by throwing more money at them through an ever-spreading web of incoherent projects; problems are solved by politics that have the wherewithal to decide on solutions and finance them from a growing local surplus.

The role of outsiders is to support that process, not usurp it—however long and whatever form it takes.....

People and their organizations must have the room to manoeuvre so that they can learn and change, try things out, and take some risks.”

Michael Edwards
Future Positive

There Is No 'Model': Development Is Not Technique

The planning and engineering model of development has led quite naturally to hope for the efficiencies that come from economies of scale whenever something appears to 'work'. We continue to look, therefore, for development 'models' and when we think we have one, we want to 'replicate,' to do the same thing again somewhere else, as if the first instance was a prototype that now needs to 'go into production.' This rarely succeeds because we forget how much the factors that appeared to work were particular to time and place.

Thomas W. Dichter
Despite Good Intentions

industry to lose sight of the forest and stay focused on the trees."²³³

Development, concludes Dichter, has always involved forces too complex to be planned or engineered. He also finds that the "history lesson that the development assistance avoids most is that development takes time."²³⁴

Paradigm Lost? An analysis of the implementation of basic education reforms in five countries of sub-Saharan Africa (Benin, Ethiopia, Guinea, Malawi, and Uganda) by Moulton et al in *Paradigm Lost: The Implementation of Basic Education Reforms in Sub-Saharan Africa* ((May 2001) sheds insight on this issue. In this publication, the authors suggest that the goal of many countries in sub-Saharan Africa to provide free universal schooling to all children through a pattern of educational reforms, with the help of foreign assistance,

may have been lost in implementation paradigms that generally featured a "top-down, rational, technical exercise led by experts seeking permanent solutions to persistent problems."²³⁵ The paradigm for providing high quality education for every child involved ministries of education taking the lead in education, with funding agencies providing support. This grew out of previous and valuable lessons learned; that modes of assistance through which funding agencies planned and implemented their own projects outside of government operations had not been sustained.

Paradigm Lost? concluded that policymakers relied too heavily on a single model to plan and implement basic education reforms. The authors felt that the systematic implementation of reform based on a technical comprehensive plan for giving every child high-quality

basic education did not accurately describe what took place in those five countries. "Although some policies and programs were successfully implemented, this happened in a piecemeal manner, not as comprehensive, coordinated reforms based on technically sound plans developed and led by Ministries of Education."²³⁶ The study noted that there was a lack of adequate resources for the reform plans and that there were weak capacities of the ministries to carry out the reforms. The study also found that governments and funding agencies used timeframes that were too short and that they made overly optimistic assumptions about economic growth for the countries. Even if time, funds and other resources had been adequate, the authors decided, "it is still unlikely the reforms would have been implemented as planned, because the process of implementing social and economic programs is not linear—there is more to the process than a systematic execution of a plan."²³⁷

This study of a lost paradigm drew considerable criticism of its own when first published; now it is being examined in a more positive light. The lessons it drew from the case studies were neither new nor unique. They are the same lessons that have appeared in myriad other articles and books on development education over many years. There



must a lesson somewhere in having these lessons repeated, and they are repeated here, in abbreviated form, to make that point:

- “To be successful, a full-scale reform requires complementary long-term agreements between the government and funding agencies.
- The reform process is ongoing, without a precise beginning or targeted end. Policies and programs should evolve as new information and ideas emerge.
- Implementation research studies of programs and projects with social goals have shown that it is the political dimensions of a reform as well as the technical ones that make or break it.
- Policies and programs should be driven by the will and preferences of schools and communities and regional and district officials, not just central planners.
- There is no single solution for every context. Competition among policies, plans, and programs will produce innovative solutions most likely to endure.
- There are at least five kinds of instruments that can serve to implement policies and

programs: inducements, capacity-building, mandates, transfer of authority, and dialogue. Each works well for some purposes and under some conditions. Thus, implementers must choose the right combination of instruments for each case.

- The challenge for funding agencies is to recognize the right time to exert their leadership, and the right time to relinquish leadership and support, rather than dominate or quash, local improvements.
- Reforms implemented under conditions of instability, insecurity, and lack of trust among stakeholders are unlikely to succeed.
- In the African context, personal relationships and politics may be just as critical to implementation as data and equipment.”²³⁸

There is wisdom in these lessons. If old paradigms are being thrown out and new paradigms of partnership are on the rise, these not-so-new lessons, and others that meld together international education and organizational development, deserve to form the core of a new paradigm—IF no one will be left behind.

LEARNING TO BE LEARNING ORGANIZATIONS

International education organizations need to be adaptive and flexible. They also need to be creative and willing to take risks. Those are not characteristics commonly associated with the key institutions of international development today. To paraphrase a book title analyzing General Motors, imbuing an international development education organization with these characteristics is like ‘teaching a hippopotamus to dance.’

The twenty-first century international organizations will need to depend less on defensive strategies that are based on internal centralization and routinization. In a different sense, and interestingly for this short look inward, organizations will need to increasingly look outward, not inward; decentralization will accelerate and organizations need to be able to adapt and to learn. The high levels of decentralization will create problems of integration. UNICEF, as one of the more decentralized of the international agencies, has blossomed under decentralization, but it has also wrestled over the years with integration as well. Adapting and learning are hard for organizations; there is a clear need for “learning organizations.” Trust will be crucial.

Looking inward at the organizations of international development and

also thinking of the nine challenges examined here emphasizes the need to bring the fields of international development, education, organizational development, and management closer together. Slowly they are merging, but much more needs to be done. The need for “grand generalists” in a world of specialists also becomes more clear. The compartmentalization of knowledge and efforts can often be counterproductive as Peter Senge, in his management classic, *The Fifth Discipline* (1990) notes:

“The compartmentalization of knowledge creates a false sense of confidence. For example, (there are) the traditional disciplines that influence management...divide the world into neat subdivisions...but the boundaries that make the subdivisions are fundamentally arbitrary. Life comes to us as a whole. It is only the analytic lens that we impose that makes it seem as if problems can be isolated and solved. When we forget it is only a lens, we lose the spirit of openness.”²³⁹

This thought, and the viability of the concept of the learning organization have led Senge to expand his Fifth Discipline ideas on systemic thinking most recently into education. In his book, *Schools That Learn* (2000), an important coalescence of ideas on education and systemic thinking occurs. Whether it is coalescing in international

development education and its various organizations is open to question.

When we think of learning organizations, the first types of organizations that come to mind are educational organizations such as schools and yet the learning organization concept seems late in coming to the world of education and international development. Senge even calls his latest work on education a prequel to his other works but the ‘learning organization’ idea is ripe for this time. A learning organization, which is more than just adaptive, is defined by Senge²⁴⁰ as:

A Learning Organization

An organization where people continually expand their capacity to create the results they desire, where new and expansive patterns of thinking are nurtured, where collective aspirations are set free, and where people are continually learning how to learn together.

Peter Senge
The Fifth Discipline

For organizations working in international development education, the need is therefore to go beyond the capability to be adaptive and to be generative. A learning organization is an organization in which individuals work in a creative environment, where every individual is stretching and enhancing her/his capacity to create, where employ-

ees are invited to learn about what is going on at every level of the organization so they can understand how their actions affect others, and where employees treat each other as colleagues—with mutual respect and trust. This can become a checklist for international development organizations, whether donor agencies like USAID or small NGOs. The irony is that organizations focusing internationally on education are often not themselves learning organizations nor are many of the schools or other forms of organizations promoting learning around the world.

It is important to note here the connection between the modern organizations, international or otherwise, and how people learn. Senge identifies some “industrial assumptions about learning” that have not been brought into clear focus in the latest iteration of Education for All. If the international development community truly believes that education is for all and no one is to be behind, these are assumptions with which we must reckon:²⁴¹

- ***Children are deficient and schools fix them.*** This assumption is straight out of the industrial age assembly-line perspective. It means “seeing children as poorly formed ‘raw materials’ from which the school system produces educated final prod-



ucts'. This is the deficit perspective of learning—an attitude of many parents, educators, and the staff of well-intentioned international development organizations. The survival skills of children in the schools of developed and developing countries has been transferred to modern organizations, including development organizations: please the teacher; and later we will try to please the boss; avoid wrong answers and only raise one's hand when one has the right answer just as we strive in the organizational dance to avoid blame; learn to be quiet and later not question the boss.

- ***Learning takes place in the head, not in the body as a whole.*** This assumes that children are not just mental storehouses of facts, but also lack the capacity to do something with the learning. The traditional classroom in developing and developed countries is often based on intellectual learning. "Only the head is required; the rest of the body can be checked at the door. The result is a passive rather than an active learning environment."
- ***Everyone learns, or should learn, in the same way.*** Despite an awareness by educators that this is not so and

that there are multiple intelligences, there are practical challenges of the mismatch between assembly-line schools and the varieties of ways in which children learn. The one-size-fits-all classroom may be a major reason why motivation for learning drops off after a few years of formal schooling.

- ***Learning takes place in the classroom, not the world.*** "The industrial-age school puts the classroom at the center of the learning process. Yet genuine learning occurs in the context of our lives and the long-term impact of any new learning depends on its relationship to the world around us."
- ***There are smart kids and dumb kids.*** This is the assumption that "smart kids are the ones who do well in school. The dumb ones do not." ²⁴² This ignores the alternative that all human beings are born with unique gifts.

II

The learning promoted through international development requires stiff questioning of these assumptions. Similarly, development organizations need to question themselves as to the kind of organizations they are and have become.

Phyllis R. Pomerantz, in an analysis

of aid effectiveness in Africa, looks inward and does question the current state of development organizations.

Upon looking inward, it is time, in many ways, to look for new paradigms. As Andrew Natsios has said: "The old paradigms don't work anymore. We need new alliances and partnerships that match the magnitude of the challenges and improve the effectiveness of our programs."²⁴⁴

II

This section began with a quotation by the 11th century Persian poet and philosopher, Omar Khayyam, that sees life as a "magic shadow show played in a box whose candle is the sun, around which we phantom figures come and go"; very non-linear, very non-western, very much involved with fate, also very mechanistic. Is international education development nothing but a magic shadow show today? For our purposes, the words of this Persian poet can remind us and challenge us phantom figures in several ways. First, the words can remind us that other cultures use different thought processes with which to view the world; thinking at odds with the rational and the linear. Second, the words challenge us to look, deeply and further, into what often seems to be the mechanistic and reductionist approaches of development organizations working in education. Despite all of the good ideas, the good inten-

tions, the lessons learned, and the committed people, many of those approaches are still lacking in flexibility, adaptability, sustainability and creativity. If one believes that the world is more than a “magic shadow show,” even if one has some sense of “fate,” we, the loosely knit “development community,” have an

obligation to the world to be more than phantom figures in a universal education organization machine –another magic shadow show. To develop the world, educational development organizations owe it to themselves to look inward, become learning organizations, develop themselves.

We are, however, as the organizational development and management philosopher Charles Handy says, in the “age of paradox,”²⁴⁵ and we have to learn to manage paradoxes as well as the paradigms.

“... in most development agencies today, there is also an air of disenchantment and cynicism. Staff morale is not uniformly high. The reasons for this include external pressures on the work environment, internal bureaucratic behaviors and norms, and individual psychological pressures. While many of these are not unique to donors and development agencies, the combination serves to distract attention from the work directly with the countries.”

“Efforts to streamline bureaucracy are being made in nearly all the aid institutions. But in agencies like The World Bank, project preparation and approval can take years. The internal demands are such that they take on a life of their own. Anxieties over aid effectiveness have made this problem worse as agencies struggle to implement complex monitoring systems in order to ‘prove’ their efficiency or the quality of their work. As one World Bank country director said to me: ‘We seem to be managing by the numbers. We are living by indicators.’ But are those indicators measuring the right things? With the exception of a few questions that are part of client surveys carried out every couple of years by some agencies, few, if any, of the indicators are concerned with the quality of dialog and the relationship between donor staff and their African colleagues. As Peter Senge noted: ‘Because service quality is intangible, there is a strong tendency to manage service businesses by focusing on what is most tangible. But focusing on what’s easily measured leads to ‘looking good without being good.’ It also leads to the classic bureaucratic behavior of avoiding risks that ‘won’t look good in the numbers.’ The common complaint voiced by staff in many development agencies rings true: feeding the beast is getting in the way of serving the client.”²⁴³



The road we have been on, throughout this century, has been the road of management, planning, and control. Those who stood on top of society's mountains could most clearly see the way ahead; they could, and should, plan the route for the rest and make sure they followed it.

In many ways the bigger the mountains, we thought, the better and clearer the view. We applied this approach to our organizations.

There should be a rational response to everything, we thought, It should be possible to make a better world.

It hasn't worked. Management and control are breaking down everywhere.

The new world order looks very likely to end in disorder.

We can't make things happen the way we want them to at home, at work, or in government, certainly not in the world as a whole.

There are, it is now clear, limits to management.

We need a new way of thinking about our futures. My suggestion is the management of paradox, an idea which is itself a paradox, in that paradox can only be "managed" in the sense of coping with.

Management always did mean "coping with" until we purloined the word to mean planning and control.

Charles Handy
The Age of Paradox

" Because...it is easy to explain things looking backward, we think that we can then predict them forward. It doesn't work, as many economists know to their cost. The world keeps changing. It is one of the paradoxes of success that the things and the ways that got you where you are are seldom those that keep you there."

Charles Handy
The Age of Paradox

IV. LOOKING FORWARD

IF NO ONE WILL BE LEFT BEHIND

If there is to be Education for All, in which no one will be left behind, then international development education needs to be reinvented, renovated, reinvigorated. “Education for All” and “No One Left Behind” are huge promises; they are announcements to the world that hopes will be satisfied. If governments and international agencies were more truthful (and realistic), they should either temper these bold and rosy statements with a modicum of realism...although “Education for (Almost) Everyone” or “Some May Be Left Behind, but We Are Really Going to Make Substantial Progress” do not provide the proper public relations rallying cry, or/and commit the massive resources, human and monetary, that are required to even come close to fulfilling this commitment.

It is hard to predict what comes next, for the world does keep changing. The nine challenges, and others, will continue to be the foci of international development education for the long-term. To review, the challenges are:

1. Basic Education and Education for All
2. Economic Growth and Workforce Development
3. Human Capacity Development and Training
4. Capacity Building: Higher Education
5. Partnerships HIV/AIDS and Institutional/Human Capacity Impacts
6. Abusive Child Labor
7. Education in Conflict/Crisis Situations
8. Information Technology
9. USAID's Global Development Alliance

Meeting and overcoming these challenges requires actions and commitment specific to each of them. In addition, these challenges also require more fundamental changes in how development happens. There must be a new paradigm born of old ones, lost and found. That the old and well-tested

ideas have not yet been implemented to their fullest asks us to contemplate the challenges of implementing policy reform in all of the focal areas.

Looking forward in implementing educational policy change means that we have to bring together “strategy, structure, and resources to achieve policy goals. It includes attention to sustainability, which implies the capacity to be anticipatory and proactive, not just responsive and reactive.”²⁴⁶ In order to do this, we know much that is useful, but as the soul singer Roberta Flack once said, “The only way to do it, is to do it.” Good implementation is key.

This attempt at “Looking Forward” is cognizant that the world changes and that looking backward, inward, and outward offers no guarantees that the things that got us where we are, are the things that will keep us moving forward. Nevertheless, outside of the specifics of the nine challenges, there are several observations on the future of international cooperation that must be



made as well as actions that must be taken if no one is to be left behind. These thoughts on the future are divided into four sections and offer “future-thinking” for international development education at several different levels, culminating in a brief matrix of “If/Then” questions and responses on the challenges of leaving no one behind and providing Education for All:

- International Cooperation: New Paradigms, New Challenges
- Education Reform Support (ERS)
- Strategies for the Age of Paradox
- IF/THEN. If No One Will Be Left Behind, then...

INTERNATIONAL COOPERATION: NEW PARADIGMS, NEW CHALLENGES

“There is nothing new”, laments one practitioner. There is actually a lot that is new, and there is also a slow accretion of evidence that some “old” ideas offer powerful and continuing solutions for the future. Communicating what basic education and the other challenges mean to the public and to those who walk the halls of power seems to be a major challenge in and of itself. To see how far we have not come, read the words of Lawrence

Summers, former U.S. Secretary of the Treasury and now President of Harvard University, in remarks to Country Directors of The World Bank in May 2001:²⁴⁷

“The suggestion that there would be generalized improvement in decision making processes by giving more weight to local community is a proposition for which there is little evidence...”

It seems to me that there is little to be found in that success (of the Asian countries) that points to the wisdom of much of what is said today in the name of empowerment or in the name of enfranchising those who have not been enfranchised.

II

Now I am sure that I do not understand the empowerment strategy in all of its nuances. But think about education, for example. As the Bank considers what weight to give to carefully controlled studies of what types of reading curricula work and what types do not, on the one hand, and to more extensive consultation with villagers about the design of curricula in their schools, on the other hand, it seems to me the Bank’s comparative advantage lies in the first and not in the second. I am concerned that the move toward empowerment rather than the economic approach is standing in some ways for a reduced emphasis on the analytic element in the Bank’s work. If that is so, it seems to me a troubling development.”

**Lawrence Summers
President, Harvard University
Remarks at the World Bank Country Directors’ Retreat
May 2, 2001**

That a dichotomy has to be made between consultation with villagers and carefully controlled studies is unfortunate, for both perspectives are of importance in different ways. Lack of understanding of empowerment strategies means there is a need for better communication, better “education,” and better understanding of the issues. As noted by Michael Edwards, “one of the problems of constituency-build-

ing has always been the *unimportance* (italics added) of international development to the political mainstream, but the changing global context makes questions of inter-

national poverty and conflict increasingly relevant to all our futures.”²⁴⁸ The events of September 11, 2001 underline this relevance. Dialogue, cooperation, and partnership are crucial. What qualities breed success in programs of development and foreign

assistance? For Edwards there are three such qualities, conspicuous by their absence from the programs of most rich-country governments, NGOs, and international agencies:²⁴⁹

- “Consistency with local realities;
- Long-term continuity of support, de-linked from the volatile selectivity imposed by foreign policy concerns, unreliable funding, and donor fashions; and
- Coherence between all the things that influence development performance, from debt relief to diplomacy.”

There is a yawning gap between rhetoric and reality in all development agencies, observes Edwards, and it will require concerted action in three areas to close those gaps: “better learning, with more feedback loops into policy and practice; stronger accountability, especially to users or beneficiaries; and positive incentives to perform in ways conducive to long-term impact, not short-term financial results.”²⁵⁰ Edwards argues strongly for a “global compact for the future supported by a world development fund independent of great power domination: a single negotiated framework of development cooperation for each country; consolidated funding (all assistance in one pot); and binding agreements on

domestic and international action.”²⁵¹ A “Global Compact for the Future” is one far-reaching vision for international development and international development education.

Another more recent vision for the future, more specifically focusing on education, comes from Gene Sperling, a guest scholar at the Brookings Institution, who calls for a “Global Education Contract.” Sperling notes the concerns of donors that aid-receiving nations lack “absorptive capacity” and efficiency to channel resources effectively. He observes that corruption and politics divert aid away from intended beneficiaries, while recipients sometimes fear the unpleasantness of conditions accompanying aid. Sperling calls for a new perspective.²⁵² He believes that the most likely way to achieve universal education by 2015 would be “a clear framework for collective action that outlines appropriate and realistic roles and responsibilities for donor countries, recipient countries, and multilateral institutions.” He calls for a “Global Alliance on Basic Education” (GABE) that would pool into one lending structure resources from multi-lateral, bilateral, and NGO organizations to give to developing countries with good education plans. He suggests that this vision might begin by coordinating existing aid instruments.

Whether global contracts or compacts, the push for partnerships seems to be an important and welcome trend for the future. The need for greater transparency and accountability, noted in the “look inward” chapter, will be essential. The Global Development Alliance (GDA), with all of its challenges, can be a major and fundamental step in a cooperative direction.

EDUCATION REFORM SUPPORT (ERS)

Looking to the future also requires expertise and action at the level of educational policy reform. Such reform is not easy, nor should it fall into a blueprint mode, but the future needs to build on what good lessons have been learned in the past and what foundations already exist. The predecessor to the current USAID-financed Basic Education and Policy Support (BEPS) activity, called the ABEL or Advancing Basic Education and Literacy project, has provided one such foundation or framework. This framework, called Educational Reform Support (ERS), pays increased attention to alternative forms of learning, and deserves enhanced development and wider usage.

The ERS process arose in response to several limitations perceived in the education sector:



“In the education sector, the limits to an obsession with physical and quantitative expansion have become clearer, local intellectuals question the legitimacy of the state as the sole supplier and funder of education, and education policy makers have begun to realize the relative uselessness of “pedagogical engineering” approaches based on production function models of the educational process.”

Luis Crouch and F. Henry Healey

Education Reform Support

Volume One: Overview and Bibliography, USAID.

The ERS process can (and does) help developing nations to shape policy. The process consists of a series of key steps:

- Step 1: Assess education issues and the political economy.
- Step 2: Start developing (or assisting if it already exists) a reform support infrastructure.
- Step 3: Develop a core group.
- Step 4: Develop, use, and train in specific technical needs.
- Step 5: Create demand.
- Step 6: Hold seminars, symposia, workshops.
- Step 7: Develop the capability to draft policy and legislation; go on to management and implementation.²⁵³

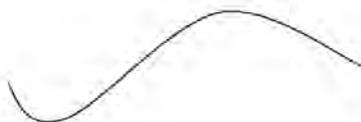
From this framework, a set of lessons is drawn and more detailed design steps are facilitated. The ERS framework and process continues

to offer a useful pathway for educational reform in the future.

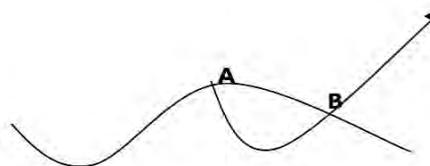
STRATEGIES FOR THE AGE OF PARADOX

No matter what framework of policies and cooperation for international development education is embraced in the future, there also needs to be thought given on how to cope with change and what Charles Handy has called the paradoxes of our time and our future. Before summarizing what must happen IF no one will be left behind, it is useful to reflect on the simple lessons of Handy’s “Sigmoid Curve.” These are basic to thinking about trends and innovations for the future, and the strategies for dealing with the many paradoxes (organizational, individual, intelligence, work, productivity) that continually will come our way.

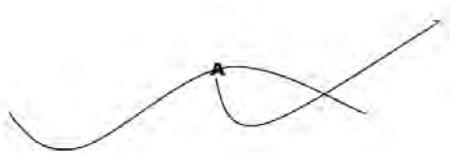
In essence, a “sigmoid curve” is simple. This is what it looks like:²⁵⁴



The sigmoid curve in many ways sums up life and has intrigued people for centuries (another old idea made new). We start slowly and experimentally, then we peak and then we fade (unless we think of life as circular, leading to reincarnation). The secret to constant growth (and anticipating change) is to start a new sigmoid curve before the first one peters out (goes down hill), such as at Point A in the curve below.



Change only may come when you are looking disaster in the face, around Point B on the first curve—and then it is probably too late, with energy and resources depleted.



The wise person or group or company or international organization will start its second curve at Point A because that is the pathway to build a new future while maintaining the present. The second curve can be a new product, a new idea, a new culture or a new way of operating (a Global Compact, a

Global Development Alliance) and it must be noticeably different from the old. The people may also have to be different than those who led on the first curve. For awhile, new ideas and new people have to coexist with those from the old order until the second curve is well-established and the first begins to wane.

This is not a complicated thought process, but to implement it can be difficult, especially in the time when both curves are co-existing and there may be confusion.

The idea of the sigmoid curve brings the worlds of international development education organizations in touch with the worlds of management and organizational development, and that is as it should be. In order to look forward to the future with a sense of strategy, for our organizations and for many of our challenges, we need to be able to cope with change and with paradoxes, and get on the right curve, at the right time.

IF NO ONE WILL BE LEFT BEHIND, THEN...

Even if nations and international organizations manage to tame their promises while increasing funding and overall efforts in a massive way, it is necessary to ask, and to answer the following "If/Then" questions about the nine challenges

that shaped this paper and then follow through for the long-term, with more detailed and sustainable answers. From this, new paradigms, and paradoxes, will be born. The real danger is not a lack of good ideas, but a refusal to try them.

The time has come to truly meet the challenge of education for all; to leave no one behind. The time has come to decide that IF we want certain actions to take place, THEN we must transform rhetoric into reality. The time has come to even more deeply look inward, outward, backward, and forward. The time has come to find lost paradigms of development and education, move away from old paradigms, and move on to new ones. The time has come to truly develop international development organizations, schools, and alternative educational bodies into functional "learning organizations." The time has come to look for solutions that emphasize learning, not just schooling. The time has come to move beyond stifling bureaucracies and into new partnerships. The time has come.

"I believe the time has come for higher expectations, for common goals pursued together, for an increased political will to address our common future."

**Gro Harlem Brundtland
Our Common Future**



Table 8

IF/THEN IF NO ONE WILL BE LEFT BEHIND THEN...		
LOOKING OUTWARD	IF	THEN
<p>Challenge One: Basic Education and Education for All</p>	<p>If basic education is to be for all</p>	<ul style="list-style-type: none"> • rhetoric must be transformed into reality and Education for All truly means ALL. • partnerships for development, (public/private, public/public, international organizations/governments, public/parent, parent/child/ learning institution/child) must be developed rapidly for the long-term. • long-term thinking must replace "short-termism". Development and education problems are not solvable by a 'pop a pill' or 'give an injection' mentality. • learning, not just schooling, must be in clear focus. • do the math. If the rhetoric asks for All, then the financing, through whatever collaborative arrangements, must rise to the same level as the rhetoric. • there must be recognition of McWorld, the Lexus, Jihad and the Olive Tree. The political, the economic and the cultural aspects of educational reform must be accounted for in the new paradigms. • access must be increased, especially for girls. • access must be coupled with quality, even if done in gradual increments, because access only for the sake of satisfying numerical goals ends up satisfying no one. • teachers must become midwives; brokers of knowledge, • education has to not be viewed as a set, unchanging body of knowledge; culture also has to be incorporated into learning. • local and international partnerships must be built. • support for improving data information collection and analysis procedures, with greater cooperation among agencies, is essential. Increasing the use of thorough 'tracer studies' could have a profound effect on educational policy-making. • "language of instruction" must receive major attention and support. • solutions based on local/regional requirements have a greater chance for cultural relevance. • greater investment must be made in nonformal education, community-based education, and empowerment-based education.
<p>Challenge Two: Economic Growth and Workforce Development</p>	<p>If workforce development is to be effective and have a lasting impact</p>	<ul style="list-style-type: none"> • attention must be paid to holistic approaches, more flexible money be given to (USAID) Missions, long-term instead of short-term views, the creation of better bridges between supply and demand, public policy that supports increasing public/private partnerships and an engaged citizenry, and leaders, inside and outside government, who support the importance of local, grassroots, citizen participation as the cradle of economic growth, improved governance, and improved workforce development.
<p>Challenge Three: Human Capacity Development and Training</p>	<p>If training is to be truly effective and have lasting impact</p>	<ul style="list-style-type: none"> • training must be linked closely to a variety of internal change processes within organizations, and must be a series of interactive learning environments and continuous learning opportunities rather than simple classroom-based teaching. • bad habits to be abandoned include the preparation of training 'wish lists', thinking of training as donor-driven or supply-driven or distributed as a benefit or a quick fix. Training, like education, is no panacea. • capacity development is key.
<p>Challenge Four: Capacity Development and Higher Education Partnerships</p>	<p>If higher education partnerships are to be effective</p>	<ul style="list-style-type: none"> • there needs to be a supportive country context, mature participating organizations, similar organizational activities, similar norms and organizational cultures among partners, and complementary income structures (not competing for the same donor funds).
<p>Challenge Five: Education in Crisis/ Conflict Situations</p>	<p>If education in crisis situations is to grow in quality and quantity</p>	<ul style="list-style-type: none"> • continued research must be supported to more clearly identify the needs of children and adults in such situations at different stages and in different types of crisis situations. • the fledgling Inter-Agency Network for education in Emergencies (INEE) requires continued and relevant support as well.

IF/THEN IF NO ONE WILL BE LEFT BEHIND THEN...		
LOOKING OUTWARD	IF	THEN
<p>Challenge Six: HIV/AIDS and Institutional/Human Capacity Impacts</p>	<p>If the efforts to combat HIV/AIDS and particularly its effects on education are to meet the challenge</p>	<ul style="list-style-type: none"> • strong 'capacity-deepening' efforts must be initiated at a variety of levels, and they must be long-term endeavors (a process not an event). • HIV/AIDS programs must be a fundamental part of overall poverty reduction and capacity development efforts, not separate 'events' (see Stillwaggon). • governments facing a 'trilemma' of declining funds,..the need to take a longer term perspective on economic and social development, and the need to cut revenue demands on already suffering peoples...must address these problems by reducing waste, scaling back and carefully using technical assistance. • there is an urgent need for a "battle plan" to be formulated to deal with HIV/AIDS and education. Good interagency collaboration, communication and cooperation will be essential to the planning and implementation process. • a new medical research agenda that is multi-focused (vaccines, drugs, microbiotics, behavioral agendas, and combinations of these options), comprehensive, and addresses the unique health issues of the developing world, requires immediate and substantial support.
<p>Challenge Seven: Abusive Child Labor</p>	<p>If programs targeting abusive child labor are to tackle this large and important problem effectively</p>	<ul style="list-style-type: none"> • there needs to be increased collaboration among agencies, continued and increasing support for innovative programs around the world, linking of projects, substantially increased support for research on child labor problems, and improvements of impact assessment re the interventions made concerning child labor.
<p>Challenge Eight: Information Technology</p>	<p>If information technology is to continue to have an important role in learning for developing nations</p>	<ul style="list-style-type: none"> • there must be continued and measured support of initiatives already begun (Learn-Link, DOT-GOV, DOT-NET, DOT-EDU, interactive radio, and others) tempered with a reality check on educational priorities within the constraints of limited funding, the infrastructure problems and needs of many developing nations, and the digital divide that is leaving girls and women far behind in the computer and internet revolution.
<p>Challenge Nine: USAID'S Global Development Alliance (GDA)</p>	<p>If a Global Development Alliance is to succeed and be strengthened</p>	<ul style="list-style-type: none"> • careful attention must be paid to the challenges of communication among partners, reconciling private and public sector goals within a framework of development ethics, and to making the concept truly 'field-driven'.
<p>LOOKING INWARD</p>	<p>If no one is to be left behind</p>	<ul style="list-style-type: none"> • international development organizations, schools and other learning institutions must become true 'learning organizations.' • work to bring together the fields of international development, education, organizational development, and management. "The compartmentalization of knowledge creates a false sense of confidence." (Senge). • review, absorb, and then implement the reform lessons of Paradigm Lost? Create new and better paradigms that truly are put into practice. • examine and abandon the industrial assumptions about learning and education. (Senge). • learn to manage paradoxes as well as paradigms (Handy).
<p>LOOKING FORWARD</p>	<p>If there is to truly be Education for All, and No One is to Be Left Behind</p>	<ul style="list-style-type: none"> • strengthen emphasis to the political mainstream on the importance of international development. • close the yawning gap between rhetoric and reality in development agencies by heeding the advice of Edwards to accentuate (1) better learning, with more feedback loops into policy and practice; (2) stronger accountability especially to users or beneficiaries; and (3) positive incentives to perform in ways conducive to long-term impact. • promises made have to be promises kept; the world deserves no less.



The hope lies in the unknown, in that second curve if we can find it.

The world is up for re-invention in so many ways. Creativity is born in chaos.

What we do, what we belong to, why we do it, when we do it, where we do it—these may all be different and they could be better.

Change comes from small initiatives which work, initiatives which, imitated, become the fashion.

We cannot wait for great visions from great people, for they are in short supply at the end of history. It is up to us to light our own small fires in the darkness.

Charles Handy
The Age of Paradox

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THE TEN CHALLENGES TO EFFECTIVE
EMERGENCY EDUCATION

Marc Sommers

These challenges are presented here in abbreviated form.²⁵⁵

1. “THE PREDOMINANCE OF INTERNATIONAL AGENCIES AND THE EVOLUTION OF NEW SYSTEM FORMS

Wars tend to disempower governments and create space for international agencies to fill the vacuum. By providing education services to communities, UN and NGO agencies effectively become “Ministries of Education” in the areas where they work.

2. THE ROLE OF COMMUNITIES

War-affected communities usually start the schools, but what is their role when international agencies arrive? Given the unavoidable differences in power between implementing agencies and affected communities, it is important to be consistently aware of the possibility that community education programming might become paternalistic.

3. THE ROLE OF NATIONAL GOVERNMENT

War-affected national governments may be largely ignored by international agencies until student national examination accreditation and teacher certification needs surface as high priorities (perhaps 6-18 months after the emergency begins). With weak national governments and their Ministries of Education working with empowered international agencies, government legitimacy, sovereignty, and real control of education programs often are indirectly or overtly challenged.

4. A MAMMOTH CAPACITY GAP

It is common for the education authorities (government or de facto Ministries of Education) to have low technical and operational capacities. Nonetheless, international agencies may assign capacity building for education officials a low priority until the post-war period.

5. THE UNEVEN ACCESS TO AND QUALITY OF SCHOOLS

- Children and youth in refugee camps often have the best chance of gaining access to education. The quality of education may be high when compared to other war-affected students in the region.

- Students in IDP camps may have access to education as well, although it is often of much lower quality than the education provided by international agencies in refugee camps.
- In general, children and youth who reside in cities and remote rural areas (either in refugee asylum countries or within their war-affected countries) tend to have the worst chance of attending school. This is a persistent, worldwide problem.
- Nonformal education is generally underfunded during and following wars—even while the need rapidly expands. Out-of-school youth in particular are generally overlooked.

In all of these cases, the highest degree of access is to primary education. Access to secondary, tertiary and non-formal education programs tends to be minimal at best, and is sometimes nonexistent.

6. FORMULAIC VS ADAPTIVE EDUCATIONAL APPROACHES

Should international agencies introduce school kits, or should they develop and adapt a local education response?

7. COORDINATING EDUCATION IN EMERGENCIES

National education authorities frequently are not situated at the center of the coordination structures, which tend to be dominated by international agencies. Donor coordination may be the most difficult component of education for education in emergencies. A contributing challenge is that each donor may have its aid restricted or “tied.” A related challenge can surface from shortsighted education goals, often largely due to the strains of addressing immediate needs with limited amounts of finances, capacity, and time.

8. INADEQUATE DONOR FUNDING

Many major donors are restricted by internal regulations from supporting education where conflicts persist. Others prefer to wait until there is peace before supporting education in conflict-affected zones. Funding shortfalls can significantly exacerbate deficiencies in the provision of education during emergencies, particularly when the emergencies are prolonged for years or even decades.

9. EDUCATING GIRLS

In many war or postwar situations, parents of girls, particularly girls who have reached puberty, may be forced to choose between allowing their daughters to attend school or keeping them home as a protection measure. The threat of rape or child marriage can be considerable for girls. Girls’ education programs may either fail to adequately acknowledge parents’ fears and concerns or be unable to provide educational responses that address them.

10. TEACHERS

Teachers are the core of emergency education. A persistent and largely unresolved problem concerns what teachers should be paid. Teacher salary or “incentive” levels are rarely coordinated between school programs existing between, for example, refugee and IDP camps. In addition, teacher certification is a constant concern. Will the teacher’s home government accept and recognize the training certificates they received during the war?”

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