

THE FORUM

For Advancing Basic Education and Literacy

Volume 2, Issue 4, August 1993

Resources for Education for All



To Our Readers

Access to primary education should not be rationed according to ability to pay.

— Marlaïne Lockheed & Adriaan Verspoor
Improving Primary Education in Developing Countries: A Review of Policy Options

"We need to give children's essential needs a first call on society's resources, whether times are good or bad."

— James Grant

Finance may be the greatest hurdle to education for all. Extending basic education to all children and upgrading existing systems to minimum levels of quality will require greater resources just as it becomes increasingly difficult to maintain current funding. Already, education accounts for a large part of government expenditures. Even as demand grows, governments are seeking ways to reduce their financial burden. Finance is a universal issue, and few countries have the money they would like to spend on education. Yet some countries are clearly worse off.

The global trend toward market-based development strategies derives in part from the failure of governments to provide quality services to all. Yet both states and markets can fail in providing social services or attending to the common good. The debate over "states vs markets," like many such debates, has generated more heat than light. What is important, in my view, is the opportunity to renegotiate linkages among the people, state and market, to achieve better social aspirations. Rather than forcing a choice, we should be looking at other questions:

- How can the market and the state best be related to each other and to the people to realize the goals of society? What mechanisms will ensure that the state and market continue to serve the common interest?
- Given the special importance of basic education in national and individual development, how can schooling best be related to the state and market? What resource priority will society give to education, especially basic education?
- What strategies can government adopt to improve education with existing resources? How will such strategies likely affect national goals—access, efficiency, quality, equity, gender, voice, choice and collective identity?
- Who pays, and should pay, for education? Who benefits? How should resource allocation decisions be made?

A number of countries have asked these questions. This issue of *The FORUM* reports on some of their experiences and on perspectives that have emerged in the process.

In the first article, I outline a framework for thinking about policy options in education finance. The next article, by William Cummings and Abby Riddell, sharpens issues in the debate over education provision, placing them in the context of history and empirical research.

The next two articles look at education finance in Zimbabwe. Fay Chung, former Minister of Education, describes the Government's strategies for increasing access in an inherited elitist education system. Some of the strategies have been controversial, especially the



1992 levy of school fees on urban primary pupils. In a study of school choice, school type and pupil background, Lynn Ilon examines the actual meaning of choice in Zimbabwe.

Fernando Reimers challenges both sides of the debate on structural adjustment and education. On the one hand, he wonders why we do not ask whether education — an essential component of development — has improved under structural adjustment. On the other, he stresses the importance of government choices, even under austerity. Kristi Fair looks at sustainability in the case of basic education reform in Namibia. While acknowledging the need to balance resources and expenditures, she points to the difficulty of forecasting the long-term economic or political sustainability of reform.

Market mechanisms are commonly suggested as means of increasing education resources. Christopher Colclough discusses one such mechanism, user fees, in light of economic recession. Mark Bray provides an overview of the potential and limitations of another common proposal, community finance. Cheng Kai Ming describes the Chinese experience with decentralization of basic education finance.

NGOs often play an important role where governments fail. Manzoor Ahmed, Colette Chabbott, Arun Joshi and the Academy for Educational Development look at BRAC in Bangladesh. The lesson for finance is not that BRAC's programs are cheaper than those of the formal schools but that BRAC is able to use its resources in such a way that a much higher proportion of BRAC pupils persist and complete their studies.

Finally, we conclude this issue with statistics that suggest patterns and problems with existing human resource investments.

With this issue we finish Volume 2 of *The FORUM* and step up preparations for Volume 3. In Volume 1 we examined goals of education—access, efficiency, quality and equity. Volume 2 has turned within, to issues of teacher training, curriculum, governance and finance. Volume 3 will look out again to the wider consequences of education—on work, health, the natural and socially-created environments. Please write us with articles, photographs and suggestions.

— James Williams, Editor

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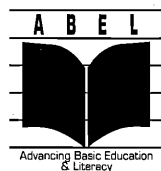
for Advancing Basic Education and Literacy
Harvard Institute for International Development
One Eliot Street
Cambridge, MA 02138, USA
Tel: 617-495-9478
Fax: 617-495-0527
Telex: 275276
Cable Address: HIID
TWX No: 7103200315

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Mobilizing Resources for Education

by James Williams

Despite ignorance in many areas, there are some things we do know about education finance:

1. Education, especially basic education, is a good social investment.

Primary education provides a high return for money spent. Rate of return studies consistently show high returns to primary schooling, usually higher than to secondary or tertiary education and comparable to investment in physical capital. There are important non-market benefits to education, such as higher productivity in formal and informal economic sectors, lower population growth and improved health. Many benefits of basic education accrue to society at large, so educational investment is in the collective interest. Though difficult to quantify, there appear to be high opportunity costs of not investing in education, and these costs are paid over a long period. These ideas, though well-known, are often not reflected in national spending priorities.

2. There are options for addressing schools' resource problems, some of which involve little financial cost.

Assuming the standard educational technology of teacher-led classroom instruction, there are two general ways to address resource problems in education: either additional resources can be generated or better use can be made of existing resources. As shown in Table 1, each of these general approaches can be broken down into a number of specific strategies. A few general comments on these strategies:

- More potential resources become available, especially from communities in cash-poor areas, when finance is broadened to include non-monetary resources. Communities lacking cash will often contribute labor, materials or expertise. In addition, many essential education resources are not financial but social, cultural or psychological.
- Not all spending is equal; some spending pays for itself in reduced costs and/or increased benefits. Thus, some inputs are critical for the success of others. For example, teachers need to be oriented to a new curriculum for the curriculum to be implemented effectively. Teachers need chalk and instructional guides, pupils need textbooks, inspectors need transportation and gas. Cost reduction strategies that eliminate such necessary inputs are likely to backfire.
- Some quality improvements also pay for themselves. Research in Northeast Brazil suggests that the poorest schools may have such high rates of repetition and dropout

that improvements in quality can lead to gains in efficiency that will more than offset the cost of improvements (see Harbison and Hanushek, 1992).

- Some human and organizational factors seem to act as catalysts for material inputs. Thus for example good, close supervision of teachers and a basic, highly-structured curriculum may substitute for extensive teacher training, as discussed in the BRAC article on page 14. Schools or systems having such catalysts need less money to achieve the same results. Other catalysts include: clarity of purpose; leadership and good management; commitment and engagement;

instructional collaboration among teachers and school leaders.

- Similarly the contexts of schooling affect the effectiveness of resources. Students seem to achieve more, for example, when values of home and school are complementary. The most important contribution of the community may be in providing a social context that reinforces the school's work. By actively involving parents in the school, the Philippines' PLSS program has increased pupils' achievement and motivation at very little financial cost (Carino & Valisno, 1992).

Table 1. Options for Addressing School Resource Problems

Strategy 1. Generate Additional Resources	
Policy	Example
Increase share of government or general education budgets	Allocate more to education, more to basic education
Get more resources (of same kind) from same sources	Increase taxes
Tap new sources of resources	Impose new taxes, permit private schools without subsidy
Develop new kinds of resources	Parental support – monetary, labor, in-kind, moral support
Shift burden to other levels of government or outside government	Privatize; Increase local (or central) responsibility for education
Strategy 2. Make Better Use of Existing Resources	
Policy	Example
Reduce Costs	
Use cheaper inputs	Use lower cost teachers
Use fewer inputs	Use fewer teachers
Reduce waste	Reassign teachers from overstaffed to understaffed schools
Increase Efficiency	
Use more cost-effective inputs	Educate some pupils with distance education
Develop a more effective mix of inputs	Ensure that all pupils have textbooks but reduce teacher-pupil ratios
Use existing resources more efficiently	Better classroom management, double shifts
Strengthen critical linkages and supplies	Link teacher training to curriculum reform; provide teachers with chalk, pupils with textbooks
Improve quality and internal efficiency	Reduce grade repetition
Reallocate existing resources	From defense to education; from higher to basic education; from subsidies of rich to subsidies of poor
Use catalysts	More teacher supervision
Create more facilitating contexts	Increase parental involvement

3. Finance strategies have implications for access, efficiency, quality, equity, gender, voice, choice and the collective identity.

Finance policies have differential impacts on different social groups and types of schools. For example a finance strategy such as school fees that increases the costs of education is likely to reduce girls' attainment if parents place less value on educating girls than boys. The same is likely to be true of any social group that values costs and benefits differently than planners do.

Averages may conceal large variations. The most advantaged are likely to be many times better off than the disadvantaged. The negative effects of spending cuts may be multiplied for the poor.

During periods of austerity, central governments are generally eager to shift the burden of finance onto other levels of government or to private organizations. To minimize negative impacts, it is important to pay careful attention to the capacity of those to whom finance is shifted. Shifting costs to groups that cannot or will not bear them will not increase educational resources. It is also important to pace the speed of the cost-shifting carefully. In many cases structural adjustment policies have been implemented so quickly that education has been unable to adjust. Because of size and dispersed organizational structures, education systems may need more time than other sectors to adjust to structural adjustment. Table 2 suggests possible criteria for evaluating finance plans.

4. Some strategies are unlikely to work.

Choice is meaningless unless parents have choices and the choices are feasible. Resource-based quality differences across schools will not improve if schools lacking capacity and access to resources are put in a competitive market with schools with more resources. Schools are unlikely to improve if responsibility for providing schooling is decentralized without authority to raise funds or decide how funds should be spent. Promises of future provision for people disadvantaged by certain policies are unlikely to be met without concrete commitments in the present. It is not known if and when the market can serve as the engine for improving school systems rather than just individual schools.

5. Design and fit are critical.

Finance and other reform strategies cannot be evaluated in the abstract but must be seen in terms of their specific design and how well they fit the needs of particular contexts. Some school choice plans in the United States, for example, lead to greater segregation of ethnic and income groups, while other plans increase within-school diversity.

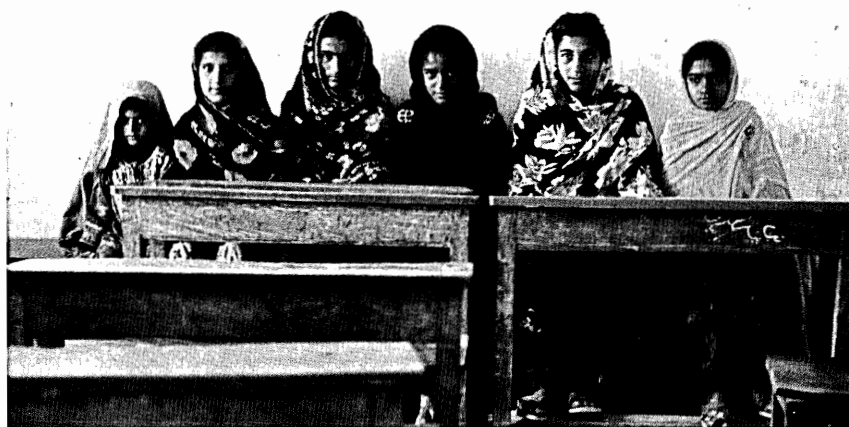


Photo: Bettina Moll-Drecker

6. Regardless of mode of provision, education systems need a center to ensure minimum standards and address inequalities.

Education systems without a central coordinating body have difficulty providing all children with minimally-acceptable levels of schooling. Decentralization tends to result in inequalities that only a central group can identify and rectify. Without some central coordination, communities end up with schools that reflect their current income. (See articles by Ricardo Lagos and Donald Winkler Volume 2, No 3 The FORUM).

7. A system's technical and managerial capacities and political will may be as important as its financial resources.

Technical and administrative capacity is needed to monitor the system, to identify and address problems. Political will is needed to

act for the common good, for example in real-locating resources toward more productive uses. Substantial capacity is needed to establish and maintain a political system in which the people manage both the state and the market (not vice-versa). Governments need to be competent and accountable. Markets need equalizing mechanisms and must operate within legitimate policies. Wealth is only part of the picture. Some very poor countries have attained universal primary education, while some much richer countries have not. ♦

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Table 2. Criteria for Evaluating Policies and Plans

What are the likely effects of a particular finance policy on:

- Girls and peripheral groups (for whom private costs are often higher and private returns lower)?
- Families, communities and schools lacking resources or influence?
- Incentives/disincentives for staff at different levels of the system?
- Principals' and teachers' engagement in instructional tasks?
- Pupils' attendance and engagement in educational tasks?
- The engagement and enthusiasm of parents and community members in the school's work?

Does the plan address:

- Private costs and benefits (individual, household, direct and indirect) as perceived by decisionmakers (eg, rural fathers) about those for whom they decide (eg, their daughters)?
- Necessary linkages – what other parts of the system must be put in place, strengthened or changed to make inputs work?
- Differences in pupil background, including differences in pupil readiness for school?
- Steps that will be taken to improve poor schools. How exactly will schools get better?
- Whether groups to whom costs are being shifted are likely to pay?
- How much money will actually be raised/saved?
- Opportunity costs?

Finance and Delivery of Education in Developing Countries

by William Cummings and Abby Riddell

Financial austerity has focused attention on alternatives to central government funding and delivery of basic education. Various measures have been proposed to shift some of the burden of education provision from the public sector to private and subnational organizations. Such measures include increased user fees, a larger private sector involvement and other forms of "privatization" along with various decentralization initiatives. We undertook a study to gain a better understanding of the historical and empirical issues involved in such policies.

Diversity of Funding and Delivery Strategies

In approaching the subject, we found confusion between the funding of education and its delivery. Table 1 shows the results of classifying education systems along these two dimensions in 1975. (These data were the most complete available, and describe conditions before the recent wave of decentralization).

The horizontal axis classifies education systems according to source of funding. Responsibility for financing education may be fully assumed by central government or shared by central and other levels of government. Central government financing is the most common pattern.

A separate issue is whether governments give subsidies to private schools. Thus the sub-

sidy/no subsidy option exists for both central and shared modes of funding.

There is more diversity in the delivery of education as shown below by the vertical axis.



Photo: Stephen Tournas

Governments may forbid or permit private delivery of education at primary or secondary levels (or both). The most common pattern is to permit private schools to supplement government schools at the secondary level. Private schooling is much less common at the primary level, reflecting the significant role of

basic education in forming national culture and the relative lack of diversity in primary education.

Thus our first major finding was a much greater diversity of possibilities and practices than is suggested by the common public-private dichotomy. These debates suggest that public, highly centralized education systems are the norm. Our analysis found that completely public systems are more the exception than the rule. Only 17% of the 127 countries for which we found data had no private schools at primary or secondary levels. Only 12% had neither private schools nor any decentralized funding below the national level. Perhaps more significantly, centralization of funding (and control), type of delivery, and subsidization are independent options. Many centralized systems, for example, have extensive private delivery of education. Still, of the 24 possible options, only nine were widely prevalent. To account for this limited number, we engaged in an historical analysis.

Historical Models of Education Provision

Pre-modern education was almost entirely funded by private sources. With the emergence of the modern nation-state in the mid-19th century, governments became involved in supporting education. In early modern education, central governments usually developed public school systems in cooperation with local governments. Later, the centralized approach became more common. The most influential models were developed over the long modern century from the French Revolution in 1789 to the Russian Revolution in 1917. Two families of approaches emerged: a more centralized Continental type with Japanese and Socialist variants and the more decentralized English and American type.

Most other education systems have adopted one or the other of these models through imitation or imposition. Thus the education structures inherited by most Third World nations were developed for other contexts and were imported with little thought to local economic, social or institutional conditions. The more recently a system developed, the more centralized it has tended to be. Somewhat surprisingly, decentralized systems tend to have more levels of administration and more administrative staff than centralized systems. Over time few systems have made radical changes in the extent or form of control.

Table 1. Numbers of National Education Systems by Modes of Funding and Delivery (1975)

FUNDING	Only Central Funding		Shared Funding		Total
	No Subsidy	Subsidy	No Subsidy	Subsidy	
DELIVERY					
No Private	15		7		22
Minimal Private	14	3	6		23
Primary Emphasis	4	5	1		10
Private at Both	9	7	4	4	24
Secondary Emphasis	16	10	8	4	38
Minimal Public	2	7	1		10
Number of Countries	60	32	20	15	127

Shared Funding: Responsibility for funding (and usually control) shared by central and other levels of government

Subsidy: Government subsidies to private schools

Minimal Private: Less than 5% of primary enrollment and less than 10% of secondary enrollment is private

Primary Emphasis: At least 5% of primary enrollment is private, and private primary enrollment is at least 5 percentage points higher than at secondary

Secondary Emphasis: At least 10% of secondary enrollment is private; percentage of private enrollment at secondary is at least twice as large as at primary level

Minimal Public: Private sector accounts for at least 60% of enrollments at one level and is large at the other

Micro Evidence and Macro Policy

Our literature review uncovered no macro, crossnational evidence on the effects of privatization and/or decentralization at the system level. Thus at this time, it is impossible to draw conclusions about the relative effectiveness of different systems of finance and control.

However a number of studies have examined the effectiveness of public and private schools at the micro level within countries. Many of the results need to be viewed skeptically. Nonetheless, certain lessons can be learned.

Findings

1. Research does not yet show a clear advantage to private or public schools, despite claims by some studies that private schools are more effective and no less efficient. Such conclusions need to be understood in their national contexts. Schools that are cost-effective in one context may not be so in another.

2. The advantages of private or public schools must be seen in light of particular goals. Effective schools in a system that values access are different from those in a system that values quality.

3. Though private schools may improve access and in some cases offer greater choice (eg single-sex and home language schools), privatization generally reduces equity. This is likely to be the case in countries that do not subsidize private education as well as in countries that permit decentralized control and subsidized schools.

4. All systems must balance access, equity and quality. A small group of high quality schools is likely to increase social differentiation. The increased access afforded by community-provided schools such as Kenya's harambee schools may be offset by lower quality. Access to schooling is sometimes increased without provision of sufficiently high quality instruction for children to pass examinations.

5. State intervention is essential to address imbalances. Increasing access and equity requires programs designed specifically to address equity problems. But the success of such interventions depends on the capacity of the system, and the political desires of those at the helm. Addressing disparities requires a management information system able to highlight needy cases and a financial system able to compensate for them. Many systems lack these capacities.

6. It appears that in developing countries schools explain more of the variation in pupil achievement than in industrialized countries. In industrialized countries, an average of 12% of the total variation in achievement test scores is explained by differences across schools (Bosker and Scheerens, 1990).



Photo: Stephen Tournas

Evidence from developing countries is sparse. But the available studies find an average of 47% of the differences in primary pupil achievement is explained by differences between schools (average 41% at secondary level). However, we do not know whether these between-school differences are primarily a result of variations in school quality or of differences in the socioeconomic backgrounds of students attracted to different schools (Riddell, 1993).

7. For schools to have meaningful autonomy and for a national education system to be both efficient and of high quality, a central hub is needed to set standards and regulate disparities. Without such a hub, a country is likely to end up with an educational system that fails to meet national goals.

Conclusion

Circumstances in many Third World countries are very different from those in the United States, the United Kingdom and other industrialized countries, where choice is most strongly advocated. Competition is meaningless unless there are sufficient numbers of schools from which to choose. There must be price elasticity for competition to drive efficiency in the marketplace. Neither of these conditions hold in many Third World countries. For school autonomy to work, schools need sufficient management skills to function independently. These skills are not always available, especially without explicit training. If user fees are to

be charged, careful attention must be paid to the most vulnerable groups who are likely to suffer disproportionately.

Privatization may hold potential for increasing educational revenues in Third World contexts. Decentralization, especially at the school level, may foster greater creativity and diversity in a nation's schools. But the ramifications for wider society must be acknowledged explicitly, and the prerequisites for success must be provided. Whatever path of educational development is taken, there will be tradeoffs in equity, efficiency and effectiveness. The decision to choose one path rather than another will be a matter of politics in the end. Policy analysis can only better inform decisionmakers. ♦

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William Cummings is Professor of Comparative Education at the State University of New York at Buffalo. Abby Riddell is Institute Associate at the Harvard Institute for International Development. A forthcoming issue of the International Journal of Educational Research will be devoted to a greater detailing of the material presented here.

Resources for Education: One Country's Strategies

by Fay Chung

For many African countries, independence in the 1960s brought a commitment to free public education for all. Three decades later the picture in Africa is uneven. There is far more literacy and numeracy. But universal primary education is still not attained in many countries, and access to secondary education is often severely limited.

Zimbabwe is certainly one of the more successful cases, for virtually all its children enter primary school. Although only 75% complete the full seven years, even dropouts get 4 or 5 years of schooling. Secondary enrolment rates are relatively high, 49% of boys and 42% of girls. Most students who enter secondary school complete the 4 years up to 'O' levels, equivalent of the British school certificate. After 'O' levels, selection is very stringent, with less than 7% of the age group able to enrol in higher education and less than 1% in university.

A major obstacle to attaining full basic education is finance. There are never enough resources for education in underdeveloped countries. Even in countries like Zimbabwe which have made education the foundation of the national development programme, resources are very tight. Government investment in education has increased from Z\$127.6 million in the 1979-80 financial year to Z\$2,302.4 million in 1992-93, an eighteen-fold increase in nominal terms. Education now comprises 15.7% of the budget, down from a high of 24.6% in 1985-86. Within a short peri-

od primary enrolments nearly trebled, and secondary enrolments increased tenfold, as shown in Table 1.

This increase was made possible by sharing responsibility for education among Government, local authorities, churches and parents and by choosing low-cost routes to democratizing education over more attractive and popular higher cost alternatives. Thus it was possible for local communities to contribute fully to construction and administrative costs, whereas higher cost alternatives would have excluded them.

Shared Responsibility Policy

In 1981 the Ministry of Education undertook a detailed study of existing schools, their locations and populations served. Following this exercise, it was decided to allow local authorities to establish schools according to demographic needs. Schools were to be located 22 kilometers apart to enable children to attend school as day students. Local authorities were permitted to establish schools according to the Ministry's school mapping exercise. The Government contributed building school grants, teachers' pay and a per student grant for school materials. In order to receive these

subsidies, local authorities had to build schools to the specifications and plans supplied by the Ministry. The actual location of schools was determined jointly by the Ministry of Education, local authorities and

Table 1. Primary and Secondary School Enrollments in Zimbabwe: 1979 & 1989

	1979	1989	% Increase
Primary	819,586	2,274,000	278
Secondary	66,125	695,882	1,051

the Physical Planning and Water Development Departments.

Under the Reconstruction Programme immediately after Independence and the end of the civil war, Government subsidies for the construction of primary schools were substantial. The Reconstruction Programme was later replaced by the Deprived Schools Programme which provides subsidies to deprived schools, particularly those in remote rural areas. Secondary school construction is also subsidized. Subsidies cover materials which must be purchased—cement, window and door frames, roofing, etc.. Local communities are expected to provide free labour, water and sand; to make bricks and to pay for local builders.

This arrangement catalysed widespread community organization and participation in building schools. Since communities had to do so much to qualify for subsidies, people identified very closely with their schools and were determined to ensure their success.

While the exact amount is difficult to gauge, a rough estimate of parental contribution is about Z\$5 million per year for primary and Z\$12.6 million for secondary school construction (estimated at Z\$2.27 and Z\$18 per child respectively). This amount is substantial, almost equaling the Government's annual investment.

Through school fees, parents also contribute substantially to the recurrent costs of secondary schooling. A three-tier system of school fees has been developed—Z\$150, Z\$70 and Z\$50 per term for residents of middle class urban areas, low-income urban townships and rural areas, respectively. There are three terms a year, and the unit cost of secondary education is about Z\$500 per year. Thus the upper tier pays for 90%, the middle

Resources continued on page 8



Photo: Victoria Baker

School Choice and Real Choices

by Lynn Ilon

Advocates of school choice argue that privatizing schools will improve access, the efficiency of distribution of educational resources and the quality of school choices to various groups in society. This note summarizes a study I carried out on school markets in Zimbabwe, where parent-financed schools exist at both upper and lower levels of quality. Findings suggest that school markets are stratified both by school quality and the socioeconomic status of parents. The existence of private schools alongside public schools provides educational options primarily for those currently attending elite schools. When only the elite enjoy real options, school "choice" replicates existing social inequities rather than providing a true "choice."

Market solutions have been proposed to address problems of austerity, inefficiencies in educational delivery and continuing high demand for education. User fees have been proposed as one way of increasing resources for schooling in a context of "excess" demand. Another solution involves a mixture of relatively inexpensive public schools alongside a robust private school market. Such an arrangement, it is argued, will permit parents to choose appropriate schooling from a range of options based on their children's abilities.

Zimbabwe is an excellent country in which to test theories of school choice against reality. The country is a model of World Bank recommendations. There is a range of schooling options of varying price and quality. It has a highly-developed private school sector, and public schools charge fees at all levels. The country has a relatively strong economic base. The government has allocated a large portion of the national budget to education.

Zimbabwe has a multi-layered education system, in which private schools represent 85% of all secondary schools. The government attempts to guarantee a minimum level of quality by paying teacher salaries at all schools.

At the high end of Zimbabwe's quality/cost spectrum are the "high fee-paying schools," which serve only a tiny fraction of the country's students. The next rung, "middle fee-paying" mission schools, are more accessible to the general public. Mission schools make up 15% of Zimbabwe's secondary schools and are well-financed, have high admissions standards and produce graduates who score well on exit exams. Government schools (another 15% of secondary schools) are of moderate quality, with trained teachers, government-supplied textbooks and adequate facilities. Community schools, representing 70% of the

Table 1. Some Schools Are Much Poorer Than Others

	Community Schools	Government Schools	Mission Schools
Students per Teacher	29.8	27.0	24.8
Texts per Student	0.5	0.6	1.0
Uniforms per Student	1.5	2.0	3.0
Unit Expenditures*	\$Z154	\$Z217	\$Z520

Table 2. Poorer Students Go to Poorer Schools

	Community Schools	Government Schools	Mission Schools
Average Years of:			
Mother's Schooling	5.4	8.0	8.5
Father's Schooling	6.6	9.3	9.8
Average Proportions of:			
Mothers Earning Income	19%	34%	43%
Fathers Earning Income	54%	79%	86%
Families Owning Car	11%	45%	56%
Value of Household			
Durables*	\$Z56	\$Z132	\$Z182

Table 3. Students' Prospects Vary According to School Type

	Prospects of Attending†		
	Community Schools	Government Schools	Mission Schools
Community School Students	70%	18%	12%
Mission School Students	40%	34%	26%

† Students' "prospects" were simulated statistically using data on school types, school quality, cost factors, family and individual characteristics. Refer to my 1992 article (referenced below) for details of estimation procedures.

* in Zimbabwe Dollars, 1989 (\$US 1 = \$Z 2.13)

country's secondary schools, are schools that were built by rural communities, who, before Independence, had no schools. The government pays for teacher salaries but leaves the building and maintenance of schools to local communities. Community schools tend to have high student-teacher ratios, poorly trained teachers and poor facilities.

My study included a survey, in January 1989, of 444 Form II and 405 Form IV children in

74 classrooms and 39 schools of different types. Each child was given a short questionnaire on his/her family and self. Demographic and quality data were also gathered on each school.

Results indicate that community school students (the poorest group) have only a small chance of switching to government (18%) or mission schools (12%). In contrast a typical

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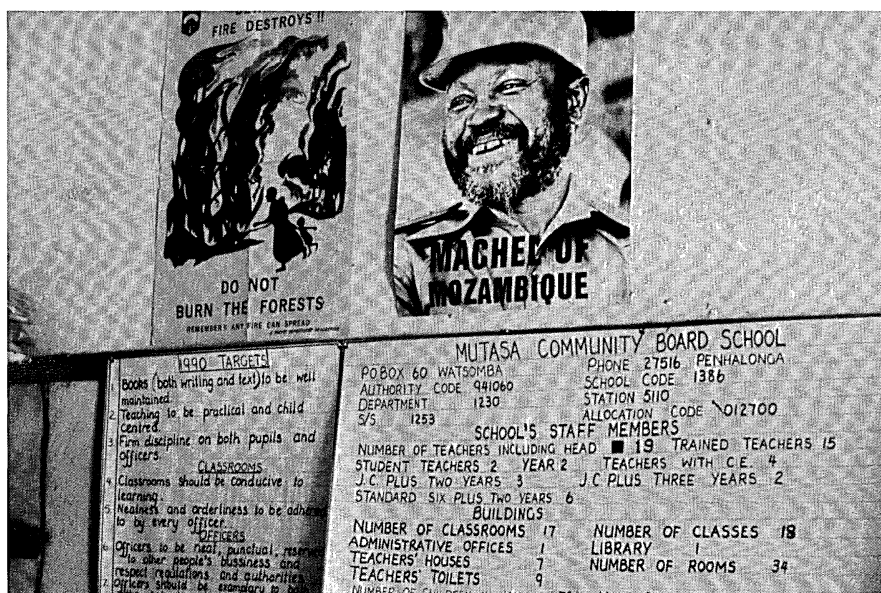


Photo: Victoria Baker

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tier 42% and the lowest tier 30% of the cost of education.

At the primary level until 1992, parents paid only for capital costs. Parents decided the level of payments according to their needs, the

People identified very closely with their schools and were determined to ensure their success

quality of work they required (equal to or above minimal building safety standards laid down by the Ministry of Education) and their ability to pay. In 1992 it was decided to charge urban parents for primary school. Rural areas, where 75% of Zimbabwe's population lives,

are still exempt. Urban parents pay on a two-tier system of Z\$70 and Z\$20 per term (for middle class and low-income areas respectively). In addition to fees, parents are allowed to supplement Government efforts through voluntary "levies," which permit schools to acquire libraries and computers.

This system of building fees and school levies has played an important part in Zimbabwe's school expansion programme, though it has its disadvantages. Richer communities can afford lavish provision, whereas very poor communities can afford little or nothing, thus widening gaps between rich and poor schools. The Government has tried to offset this by making special provision for deprived schools.

On the positive side, communities identify closely with the schools they have built. Communities work to improve school facilities, laboratory and workshop equipment and the quality of staff. Thus fees have had a positive and sustained impact on school improvement.

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mission school student has a greater probability of choosing other options: 34% government, 40% community and 26% mission.

Why are community school students so unlikely to choose mission or government schools? Parents of children in community schools, undoubtedly, do not feel they face a menu of school choice options. Their only realistic choice is the local community school, poor in quality as it may be. Mission and government schools are too expensive, inaccessible,

and "scholarships" are too difficult to obtain. For most families, the only choice is whether to send the child to school at all and for how long.

Thus, researchers need to examine the assumptions underlying their school market-public choice models. Apparent "choices" may not be available. In countries such as Zimbabwe, real choices are only available to those with the resources to afford the different options. ♦

Lower Cost Policy Alternatives

In order to make massive expansion feasible, Zimbabwe selected a number of lower cost policy alternatives. One of these was day secondary schools instead of the more traditional and popular boarding schools. As capital costs of boarding schools are 8 times those of day schools and recurrent costs 5 times higher, the day schools make better economic sense. Boarding schools are still permitted but receive little state subsidy. In addition, the decision to permit construction of basic facilities, within minimal building standards, meant that both costs and technology were within the grasp of the largely peasant population. More expensive provision would have made secondary schools both financially and technologically inaccessible.

To lower the cost of education, Zimbabwe adopted innovative educational technologies. The best known of these is the science kit, which at 1/20 the cost of a laboratory, has played a critical role in introducing an experiment-based secondary science programme. In addition, though space limitations prevent discussion here, distance education has been integrated into both formal and non-formal programmes to good effect.

Conclusion

Whilst education is expensive, the cost of ignorance can be devastating. An ignorant, illiterate population is powerless in the face of tyrannical dictators on the one hand and runaway population growth on the other. Education is part of the process of empowerment, and the democratisation of education must be seen as part of the spread of democracy everywhere. Moreover the cost of education is not fixed: different policies and technologies can provide education at lower cost. ♦

Currently Minister of State for National Affairs, Employment Creation and Cooperatives of Zimbabwe, Fay Chung was Minister of Education until 1992.

Lynn Ilon is Adjunct Assistant Professor at the State University of New York at Buffalo. She has consulted for the Harvard Institute for International Development, the World Bank and USAID, has lived in Zimbabwe for two years and in the Pacific and Middle East. This article is based on a study written up in more detail in "School Choice in a Privatized Market: Equity Implications in Zimbabwe" Journal of Education Finance 17(4) Fall 1992.

Sustainability in Namibia's Basic Education Reform

by Kristi Fair

Since the late 1970s, following the failure of numerous projects after the initial phases, donors made aid contingent on "sustainability"—the ability of a country to finance programs long-term. While it is reasonable for donors and recipients to analyze expected costs and resources, such studies are poor predictors of sustainability. However these exercises can serve other purposes, as illustrated by a recent study in Namibia.

At independence in 1990, Namibia began restructuring its education system to consolidate 11 separate ethnic administrations into a unified system. The Constitution mandates universal, free, compulsory basic education from ages 6 to 16. The Ministry of Education and Culture (MEC) is concentrating much of its effort on reform of basic education (which includes upper and lower primary, junior secondary, adult and nonformal education).

Through non-project assistance USAID is contributing \$35 million over 5 years to the reform. Funding is released in "tranches," or stages, subject to conditions. One condition for release of 1992 funds was a study of the resource base to determine whether the basic education program was sustainable. This study led to preparation of a report.¹ The study estimated costs of operationalizing the reform under four sets of policy assumptions, in addition to design and implementation costs:

1. "Baseline" estimate. Access, transition rates, class size and so on to remain at 1992 levels for the decade. (Issues such as inter- and intra-regional inequities in access, internal efficiency and unit spending would not be addressed. For example, the highest-paid teachers receive over 12 times the salaries of lowest-paid teachers.)
2. Costs of gradually enrolling all 6-year olds in grade 1, with automatic promotion but opportunity for repetition in grades 3 and 7.
3. The above, as well as costs of equalizing class sizes by 1998 and provision of needed facilities.
4. The above, plus equalization by 1998 of "non-teaching" salaries (headmasters, department heads, etc) across regions.

Annual shortfalls were predicted for all scenarios (calculated by subtracting expected costs from the midpoint of high and low estimates of resources). Projected total deficits, 1993-2002, ranged from 1.7 to 2.5 billion rand (\$US1= R2.62 in 1989). Yet the study, while acknowledging that costs exceeded resources, concluded: "Overall, the analysis suggests that although resources will be tight,

the Reform Programme is feasible and sustainable."²

If sustainability means staying within budget, then basic education reform—given the assumptions and best estimates of costs and resources—is not sustainable with the MEC's resources. However, is the reform "sustainable" if external assistance supplements Namibia's resources? If such assistance were given for a limited period, would the reform be unsustainable in the near future but sustainable in the long term?

The report recommends the government base decisions of external aid on long-term sustainability. But how can this be determined? Long-term macroeconomic projections are notoriously unreliable. GDP will be shaped by unknown factors such as drought, prices of uranium and diamonds, results of offshore oil drilling and so on. Also uncertain is the size of future allocations to general and basic education. These questions raise a larger issue. If cost and resource projections are unreliable, why are these studies done and what purposes do they serve?

Legitimation of Government and Donor Activities

While the predictive power of sustainability studies is low, their legitimation value is high. Namibia's newly elected government opted for reconciliation rather than confrontation with the old guard. There is strong resistance to social reform and cost is one objection. The national climate of austerity and the realization that the MEC's operating costs exceed its resources have pressured it to show that its reforms are affordable. In this context the study's conclusion that the reform is sustainable but that funds are tight is useful in both legitimating reforms and lowering expectations of immediate reform without tradeoffs.

In addition to its domestic political value, the study helps the MEC in its dealings with donors. The study satisfies a conditionality for release of USAID funds. It illustrates the MEC's efforts to institutionalize assessment of resource needs. The conclusion of sustainability confirms the reform as worthwhile investment. The gap between expected revenues and costs underscores the need for additional external funds. For USAID the overt meaning of sustainability is a country's ability to assume a project's recurrent costs. Another meaning is the donor's continued involvement in development work. A donor that does not provide funds and expertise is out of business.

Is sustainability then a meaningless term? Doubtless, resource needs must be consid-

ered, though studies may add little new information. Given the uncertainty of future conditions and the heroic assumptions required to calculate needed resources, sustainability is unpredictable. A wider consideration of the political and social climate is indispensable but is as unpredictable as economic projections. In Namibia a critical question is the persistence of political and societal will to pursue equitable access and operational effi-

Is sustainability then a meaningless term?

ciency. Assuming consensus on these goals and that improved efficiency will free funds for increasing access, the two goals will still compete for limited resources. Finally, sustainability depends on another unknown—the continued willingness of donors to support projects. In short, none of the broad or narrow views of sustainability can answer the unknowable—whether reform will continue and in what form.

This study intends to provoke an explicit discussion of the several, often conflicting purposes of sustainability studies. Such studies do not answer the question they pose, partly because of the uncertainty of future economic, political and social conditions and partly because assessing sustainability is not their sole or primary purpose, which is legitimation. Legitimation is not necessarily negative. A young democracy such as Namibia, with its still divided people, needs to justify its reforms as fully as possible, and economic analysis has great currency. However if donors and governments use sustainability studies solely as means of legitimation, there is room for alternatives. ♦

Kristi Fair was Research Assistant for the Ministry's Basic Education Reform Project, for which she conducted background research for the study. She can be contacted at Educational Foundations and Policy Studies, Florida State University, 306 Stone Building, Tallahassee FL 32306, USA.

¹ Republic of Namibia, Ministry of Education and Culture, 1992. *Basic Education Reform in Namibia: Costs, Resources, and Sustainability: Projections for 1993-2000*. Windhoek. Also see Republic of Namibia, Ministry of Education and Culture, 1992. *Basic Education in Namibia: A Framework for Nation Building to the Year 2000 and Beyond*. Windhoek.

² Ibid, p. xii.

Economic Adjustment and Choices in Education

by Fernando Reimers

Economic adjustment shapes the new context within which education policy-makers must make choices. It brings a new set of challenges to achieving the goals of Education for All. The social impacts of structural adjustment have been the subject of much debate. However, this discussion, it seems to me, has asked the wrong question.

The Essential Question

Much of the debate centers on whether declines in social indicators should be attributed to adjustment. It is hard to know, the argument goes, how things would have turned out without adjustment. The basic point, however, is not whether adjustment is to blame for declines in social conditions but whether adjustment has led to improvements. Adjustment was intended to restore long-term economic growth. One appropriate test is to examine the fundamental requirements of economic growth, such as education and human resource development. From this perspective, structural adjustment should be given due credit or blame in response to a different question: After up to a decade of policies aimed at improving resource allocation and efficiency, are countries doing better in education and human resource development?

Effects on Families and Governments

The 1980s were a time of growing austerity for many countries. Per capita income fell in 25 of 39 countries with available data in Sub-Saharan Africa and in 14 of 18 such countries in Latin America. In Sub-Saharan Africa income fell more commonly in adjusting countries. While 71% of "adjusting" countries experienced falling incomes between 1980 and 1988, 45% of the non-adjusting countries did so.

Economic adjustment influences both supply and demand for education. In terms of demand, education involves direct costs to parents as well as opportunity costs, both of which are influenced by the economic conditions families face. Reductions in incomes led to deteriorating living conditions and reduced potential household contributions to schools. The implication is that in hard economic times, the State must increase rather than decrease its contribution, to maintain levels of education provision. In highly inequitable economies, declines in per capita income may lead to further inequities for the very poor. UNICEF has estimated that a 2-3% decline in average income in Africa means a 5-fold income drop for the poorest (UNICEF, 1984).

In supply terms, education provision depends on the proportion of government revenues

allocated to education and the structure of the education budget. Under pressure to close fiscal gaps, many governments reduced education expenditures. This was done in the context of both overall reductions in government expenditures (net of interest payments) and disproportionate reductions to spending in education. The short-term focus of adjustment did not permit special treatment of education.

The costs of adjustment must also include costs of missed opportunities

As a result, education expenditures declined as percentages of GNP and of government budgets and in real terms, especially in countries undergoing adjustment. While education spending as a percentage of GNP declined in 52% of Sub-Saharan countries, declines were 5 times more likely in adjusting countries. In Latin America where education expenditures as a percentage of GNP declined in 41% of countries, declines were twice as likely in adjusting countries. Education spending declined in real terms in 38% of sub-Saharan African countries and in 53% of Latin American countries.

These findings are consistent with other studies. A World Bank analysis of the impact of structural adjustment found that:

"Expenditures on health and education have increased in non-adjusting countries. [But] Most of the intensely adjusting countries...show a decline in per capita expenditures for health and education...[these] are cause for concern, especially for those countries that, by any account, need significant improvement in their social sector infrastructure. ...Because providing health and education services is an investment in human capital, such greater emphasis can be fully comparable with adjustment policies that aim at long-term sustainable growth (Kakwani et al. 1990, 21-23)."

Facing cuts in funding, education ministries first cut funds for building construction and maintenance, then for teaching materials. The high wage component of education budgets meant that teacher salaries had to be cut to

reduce government spending, and so teacher salaries eventually fell in real terms. Class sizes increased. Teachers had less time to prepare classes, fewer teaching resources and poorer facilities. Deteriorating economic conditions put added stresses on students' households. Students were more frequently tired, hungry or sick and brought fewer supplies such as notebooks and textbooks. These changes in household and learning conditions led to declines in primary enrollment rates in many adjusting countries. In addition, the opportunity to move from primary to secondary education was substantially lower in adjusting than in non-adjusting countries.

Choices in Adjustment

These unfortunate developments resulted from choices made by governments with the support of international agencies. In many countries adjustment programs promoted by the World Bank and IMF have not worked to promote educational development. Rhetoric about the difficulty of establishing causality between adjustment and deteriorating conditions in education and other social sectors must give way to accountability. International financial institutions should be part of the solution, not part of the problem. Their record must be assessed by the number of successes they can claim not by whether or not they are to blame for failures. It is true that countries must live within their means. But there is room for creativity on the speed and mechanisms by which severely distorted economies are brought back to equilibrium. International institutions should dialogue with national counterparts to identify solutions fitting the economic, social and political realities of each country.

Countries also have choices in how they treat education within adjustment and how the education sector itself adjusts to new economic realities. International institutions can too easily become scapegoats for a lack of national capacity to restructure the economy. Developing human resources is not easy and does not happen simply by increasing financial resources, though resources are necessary. A number of adjusting countries chose to increase education spending as a percentage of GNP, including Bangladesh, Burundi, Brazil, Colombia, Gabon, Gambia, Ghana, Jamaica, Morocco, Nepal, Pakistan, Panama, the Philippines, Tunisia, Uganda, Uruguay and Zimbabwe. There is nothing inevitable about how education will fare under adjustment. There is no magic or universal way to treat the education sector or "protect" it from adjustment. In a context of declining resources, high

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Why User Fees Are Unlikely to Work in Sub-Saharan Africa

by Christopher Colclough

Reform of educational finance is needed in many developing countries. Current financing schemes do not generate the resources to provide formal education to all. Resources that are available are often not used most efficiently. And the wealthy capture more than their share of educational benefits. Less clear are the best ways to go about reform. Arguments tend to support a strong role for either public finance or for market mechanisms.

The Argument for Public Finance

Public finance of education has traditionally been justified because benefits accrue not only to those educated but to society at large. Thus individuals will not invest in as much education as society needs. Education is expensive. In the absence of public financing, poor families could not afford schooling, especially at tertiary levels. In such cases society's scarce educational resources would be invested in those most able to pay and not necessarily those best able to learn. Moreover, education helps determine future incomes. If access to education is determined by ability to pay, education will increase rather than reduce economic inequality.

The Case for the Market

In recent years an influential group of researchers has challenged these arguments. They have argued that public provision of education leads to inequity and inefficiency. Solving educational finance problems requires market mechanisms to allocate educational services and a reduced role for the state. Markets will allocate resources more efficiently than the state. Costs will be reduced and additional resources generated. The state can ensure equity by intervening with specific measures to address inequalities. Four specific reforms are proposed:

1. User fees at tertiary and sometimes secondary levels of schooling to shift some of the

cost of education from the state to students and their families. Scholarships would enable poor bright children to attend school.

2. Student loans at tertiary levels would have several positive effects: Loans would encourage student diligence. Education would be financed by students' future rather than present income, thus generating dynamic effects. And private demand for tertiary education would more accurately reflect social demand.

3. Private provision of education at all levels would generate additional resources and promote greater efficiency. The state could provide grants to equalize quality across schools.

4. Reallocation of public resources, using the above measures, to more socially profitable sub-sectors of education notably primary and junior secondary education.

My analysis suggests that these measures are not likely to reduce costs, generate additional resources or increase equity, particularly in sub-Saharan Africa. Instead they will exacerbate existing inequalities and reduce the efficiency of education. To clarify, let us look at user fees.

Cost Reduction. Under-investment of public funds in primary education can be addressed by either reducing costs or increasing user charges. Interestingly, market proponents do not propose direct ways of reducing costs, such as by reducing teacher-pupil ratios. Instead they propose to shift costs from government (or the taxpaying public) to students and their families, educational "consumers." As consumers, students and parents are expected to pressure education managers to reduce operating costs and develop cheaper, more efficient institutions. However there is little evidence that these results will follow.

Resource Generation. The primary rationale for user fees and other market reforms is to induce people with more money to pay more for education and thus to generate additional

resources. Such proposals make strong assumptions about people's response to increases in the price of education. They assume a sufficient number of people will be willing to pay for education to meet social goals. They also assume neutral or positive effects of market reforms on equity and quality.

Resources that are available are often not used most efficiently

The notion that people will pay more for education is based on rate of return studies. Yet the evidence is weak. According to a World Bank policy paper (World Bank, 1986), the private rate of return to higher education in sub-Saharan Africa is 32%. This figure is based on data from 16 countries. Yet only four of these countries report data after 1980. These countries, Botswana, Malawi, Lesotho, Somalia, represent only 4% of Africa's population and are hardly typical.

A more serious problem is that rate of return calculations are based on differences in relative prices. The assumption that prices have not changed over the past decade would be risky even in a more prosperous and stable period than the 1980s. My examination of real non-agricultural wages revealed a substantial drop in earnings from the 1970s to the 1980s. Wages in sub-Saharan Africa fell in almost every country for which data are available, typically halving in value between 1970 and 1985. Thus benefits of education in terms of future income have fallen considerably. In

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levels of internal inefficiency and inequity remained (completion rates, gaps between primary and university unit expenditures). The costs of adjustment must also include the costs of missed opportunities. ♦

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Fernando Reimers is Institute Associate at the Harvard Institute for International Development. This note is based on "Education and Structural Adjustment in Latin America and Sub-Saharan Africa," *International Journal of Educational Development* (in press).

Community Financing of Education

by Mark Bray

Fiscal austerity has led many governments to consider alternative ways of financing education, including the use of community resources.¹ Experiences in a number of countries suggest that communities can and do provide schools with extensive resources. The extent and forms of community finance vary widely. Some communities have assumed the entire burden of building, managing and financing schools. Other communities supplement government resources with voluntary cash, labor or in-kind contributions. Community finance is attractive to governments for non-financial reasons. Community contributions can heighten parents' commitment to their children's education. However the primary appeal for governments is that community resources can reduce fiscal pressure.

Yet there is a danger in idealising the role that communities can play in an education system. Community finance may have negative effects on equity, quality and social cohesion. Community schools, whether better or worse than government schools, often serve as instruments of social stratification. Community finance may also exacerbate regional disparities. When community-provided schools lack resources and expertise, they are likely to be poorly-managed and of low quality. If community finance helps schools maintain independence from national authorities, use of local resources may divert attention from national goals. Before encouraging community finance, governments must ask whether the likely returns are worth the costs.

If governments decide to encourage a community role in financing education, the question becomes how can community finance be encouraged and negative consequences minimized.

To Encourage Community Finance

1. **Neglect Education.** The greatest encouragement to community provision of education may be government neglect of a community's perceived needs. However, this is hardly to be recommended!

2. **Publicize.** Governments can encourage community finance more positively through publicity—radio, newspapers, public announcements and information campaigns. Publicity is useful for reaching a broad audience. However, more specific guidelines are needed to help communities provide schools with useful and appropriate support. Most communities can provide some resources, if not cash then labor, materials or other contributions.

3. **Offer Grants.** Government grants, particularly matching grants, can be quite effective in mobilising community resources. The relative contributions of government and community can be varied according to community demand and available resources. Labor and in-kind donations may be included in calculating the value of community contributions.

4. **Permit Fees and Levies.** Few community-run schools can operate without fees. School fees of course often keep poor children out of school, directly or indirectly. A school system that permits fees and is concerned about equity must devise ways of identifying and exempting poor children from fee requirements and pay careful attention to the effects of fees on different social groups. Centrally imposed and

significant management role if given guidance, particularly in technical areas such as accounting. Enabling communities to contribute to schools may thus require training and support.

8. **Relax Restrictions on Resources from Abroad.** Some communities can draw on resources from outside the country—money, instructional materials, teachers. Such resources are less likely to be forthcoming if they are taxed or heavily regulated by central government.

To Control Community Finance

Despite its potential for enhancing the resources available to schools, community finance may increase economic disparities, reducing the social cohesiveness of schools and diverting attention from government to community goals. Most governments decide to impose regulations and controls on the community's role in schooling. Regulations and control must be balanced against local initiative and autonomy.

Governments need to decide whether to permit unaided schools to operate alongside government schools. Such schools by definition require no government money, but are difficult for the government to control. Governments must decide the extent to which community schools will be permitted to determine admissions, fees, curricula and teaching staff. Groups that contribute to schools will expect something in return. The rights and responsibilities of all participants need to be specified. Finally, governments need to develop ways to identify and compensate for inequalities arising from community finance.

Community resources can provide a valuable supplement to government inputs. However, community initiative should not be seen as a panacea for the ills of education systems. ♦

Community contributions can heighten parents' commitment

collected fees tend to be rigidly enforced and involve high administrative costs. Local collection permits flexible adaptation to local circumstances. Fees place the burden of financing schooling on a narrower group than do voluntary community contributions or taxes but may be necessary for schools with big catchment areas.

5. **Define (and Reduce) School Catchment Areas.** Communities are more willing to contribute to a school they know. Defining and reducing school catchment areas often increases community identification with the school.

6. **Threaten Take-Over.** Governments can sometimes encourage communities to take greater responsibility for make-shift schools by threatening to take them over. In other cases, governments can enhance community commitment to schools by promising to leave them alone, provided certain conditions are met. To be effective, such threats and promises must be credible and consistently followed.

7. **Give Technical Assistance.** Communities may need technical expertise to make their contributions effective. Thus a community may be able to construct a school building with donated labor and building materials if provided with advice and an appropriate design. Communities may be able to play a

Mark Bray is Head of the Department of Education, University of Hong Kong. This article was abstracted from Community Financing of Education: Issues and Policy Implications in Less Developed Countries, edited by Mark Bray with Kevin Lillis (Pergamon Press, 1988). It is now available from The Education Programme, The Commonwealth Secretariat, Marlborough House, Pall Mall, London SW1Y 5HX, UK.

¹ Communities vary widely in their composition, size and defining characteristics. For present purposes a community is defined as a group of people who share economic, social and cultural interests. Its members recognize social obligations to each other, hold at least some common values and identify themselves with each other as "we."

Decentralising Basic Education Finance in China

by Cheng Kai Ming

With the reforms of the early 1980s, the financing of basic education in China has become virtually localized and heavily dependent on community funding. Before 1980 local Chinese governments were simply administrative arms of the central government with little financial power. Now local governments retain many of the revenues collected in their areas and are responsible for managing their expenditures, subject to central government guidelines. Relying on local finance has fostered local ownership of schools and has mobilised untapped local government and community resources. As a result, overall levels of funding in basic education have increased significantly. At the same time, however, disparities in regional funding have increased.

Localisation of Revenues

In China the term "local" may refer to provincial, county or township governments. Policies to localize finance were implemented to give local resources the primary role in supporting basic education. In most provinces, counties have become the major cost centers for basic education, though township governments have assumed the main responsibility for financing rural schools. Local revenues are spent primarily on basic education. Local governments may levy educational surcharges beyond local taxes, but such funds must be used entirely to support basic education.

The reform has created a situation in which each school's funding comes from several sources. The central government covers recurrent costs, mainly administrative expenses and salaries of teachers on the government payroll. Government teacher salaries follow a uniform pay scale which allows little variation among provinces. In rural villages however, many



Photo: Victoria Baker

primary school teachers are not on the government payroll. These teachers, representing 40% of all primary school teachers in the country, are partly subsidized by central government appropriations and partly supported by local finance.

Fishing

Much of the reform rests on a matching grant or incentive system. Popularly known as "fishing," this system maximizes community contributions while minimizing central government costs. Typically the local government provides incentive money (the bait) from local revenues to attract community contributions (the fish). Local donors include enterprises and individuals, who contribute either in cash or in kind. In-kind donations usually come in the form of discounted building materials or construction fees. Community contributions

are used primarily to finance the building of schools. As a result school construction now relies heavily on community donations, whereas previously the central government was expected to pay for most school construction. Other non-recurrent expenses such as improvements in school facilities are funded through "work-study" programmes. Typical work-study activities

include school-operated factories, shops or farms or income from renting school facilities to commercial concerns. Income from such activities is exempt from taxes if spent on school facilities.

Mobilisation of Local Resources

These policies have proved effective in mobilising local resources. In 1990 community contributions represented 88.5% of overall national education expenditures. Local government revenues accounted for 86.9% of government appropriations (ie budgeted expenditures).

One of the most significant achievements of local resource mobilisation is the campaign to build/rebuild schools. Begun in the late 1980s, this campaign has reduced the proportion of dilapidated buildings from 17% in 1980 to 4.4% in 1989. In many villages now, particularly in less-developed areas, the school is the village's most impressive building.

Increases in Regional Disparity

Unfortunately, financial decentralization has increased regional disparities in most aspects of basic education. Localizing funding has tied school finance to local economies. Thus economically stronger areas are able to provide more money for education in both donations and tax revenues as illustrated in Table 1.

Regional disparities have particularly harsh implications for teacher salaries because community teachers are paid with a combination of state subsidy and local supplement, plus community contribution. Similarly the success of work-study programmes depends on prosperous local economies. Where the economy is stagnant, there is little schools can do to generate income. However such programmes are quite effective in economically strong areas. Thus the net effect is to increase regional disparities.

These economic disparities are reflected in enrolment rates. The greater a province's income, the higher the proportion of counties in that province with universal primary enrolment. Thus poor areas are likely to suffer from both poor finance and poor access. While many of China's achievements in basic education over the past decade result from financial decentralization, the country is not immune to the equity implications of such policies. ♦

Table 1. Budgeted Primary Expenditures per Student in Selected Provinces*

	1988	1989	1990
Beijing	218	246	290
Zhejiang	103	120	132
Shaanxi	74	79	92
Hubei	45	46	61
National Average	77	91	105
Differences			
Beijing-Hubei (High-Low)	173	200	229
Beijing-National	131	155	185
Hubei-National	-32	-45	-44

*Figures in RMB Yuan: 1988 \$US1=3.7 Yuan, 1989 \$US1=4.7 Yuan, 1990 \$US1=5.2 Yuan

Data were obtained from the Shanghai Institute for Human Resources Development

Cheng Kai Ming is Dean of Education at the University of Hong Kong. For additional information, contact Dr KM Cheng, Faculty of Education, University of Hong Kong, Hong Kong. Tel: (852)-8592355. Fax: (852)-5170075. E-Mail: hradckm@hkucc.bitnet.

Lessons from BRAC

derived from a Project ABEL report

Bangladesh's largest non-governmental organization, the Bangladesh Rural Advancement Committee (BRAC), is recognized throughout the world for its rural development, credit and health programs. BRAC initiated the Non-Formal Primary Education (NFPE) program in 1985 in response to requests from participants in its rural development programs. The objective of the NFPE program is to develop a national primary education model to provide, in a 3-year period, basic literacy and numeracy to the poorest rural children unreached by formal schools. Girls are given special emphasis. By 1992 over 8,000 BRAC schools were in operation. The target of 70% girls enrollment was achieved.

Minimizing Direct Costs

BRAC schools are of two types: 3-year NFPE schools for 8-10 year-olds who have never attended primary school; and 2-year schools for 11-16 year-olds who have dropped out of primary school and are unlikely to return.

Bangladeshi parents identify poverty as the major reason for dropout. Thus the NFPE program is designed so that parents incur practically no direct costs for sending their children to BRAC schools. Books and supplies are supplied by BRAC. No uniforms are required. The cost of the child's time is lessened by allowing parents to choose and vary school hours according to the farming cycle. Because schools are located close to students, little time is lost in travel. Children's attendance in BRAC schools results in less loss of income

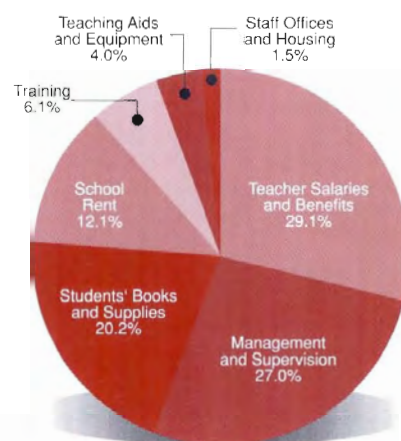
than in formal schools.

A school consists of 30 children living within 1 km of the school. A majority of BRAC pupils are rural girls. Teachers are generally married adults, 60-70% women, who have completed 9 or more years of school and live within walking distance of the school. Teachers are hired on a temporary, part-time basis and are paid modest wages. There is one teacher for 30 students. Teacher training consists of 15 days of initial training at a BRAC training center, 1-2 day refresher training sessions conducted each month by BRAC staff at an office near the school and weekly visits from BRAC field workers.

The school is in session about 3 hours a day, six days a week, 268 days per year. Students enroll at the beginning of the three years. At the end of a three-year cycle, the school begins again if there are enough children in the community. Instruction is provided in 1-room houses and storerooms rented for 3 hours per day. The children sit on bamboo mats on the floor and hold slateboards on their knees. The teacher has a stool and a metal trunk that doubles as a desk and supply cabinet.

The parents of most BRAC students are illiterate and socio-economically disadvantaged. While they make no monetary contribution to the school, they are expected to support the program in other ways. Prior to a new school opening, parents and BRAC staff meet several times. Parents must also pledge to attend monthly parent meetings and to send their children to school each day.

Figure 1. Breakdown of BRAC Expenditures



Student Achievement

BRAC students achieve as much as or more than formal school students. More than 90% of the children who start BRAC schools graduate. A large proportion of NFPE program graduates are admitted into the government system. BRAC students completed Class III and entered Class IV at a significantly higher rate than other students.

By any standard, BRAC's costs are low. Current costs per student are about \$US18 per year, approximately equal to the costs of government schools. The distribution of BRAC's costs (Figure 1), however, reflects a greater emphasis on management than in government schools. Because of higher attendance rates, lower repetition rates, higher completion and continuation rates, BRAC schools are substantially more cost effective per graduate than government schools. Even so, BRAC has had to rely on donors for much of its operating budget.

Lessons from BRAC

Several lessons can be drawn from the successful experience of BRAC's primary education program:

1. Part-time paraprofessionals can make good teachers for lower primary school, if they are adequately trained, supplied with a very structured curriculum, and most importantly, adequately supervised. BRAC's model for teachers is part-time paraprofessionals plus continuous training plus intense supervision. Government schools that use paraprofessional teachers without such supervision do not



BRAC continued on page 15

BRAC continued from page 14

achieve the same results as BRAC schools. Thus while BRAC has been able to economize on teacher salaries, it has maintained quality with a simple curriculum and close supervision.

2. Primary school participation can be improved, even with traditionally hard-to-reach populations. Features needed to increase girls' access to and persistence in primary school are not necessarily expensive. What is required is a targeted approach that minimizes direct and opportunity costs of school attendance and persistence.

3. A basic curriculum that is fully implemented is better than a more progressive one that is not. BRAC schools with a simpler curriculum are achieving as much as government schools with more elaborate curricula. Thus, again, good basic education need not be expensive but must be implemented well.

4. NFPE schools are not handicapped for lacking permanent school buildings. Rented rooms provide space, at minimal cost, for BRAC's small group format. The program is thus able

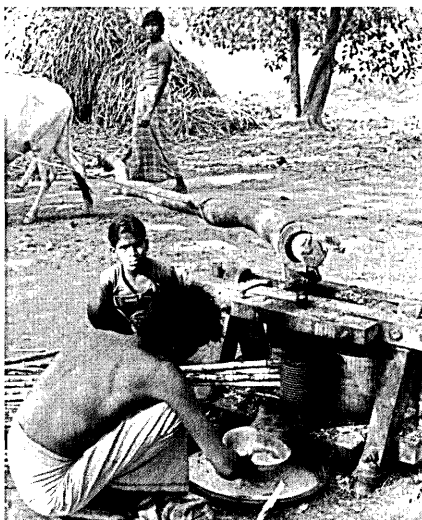


Photo: UNICEF/Sean Sprague

to concentrate resources on other aspects of their program more closely related to program objectives: enrollment, persistence and achievement.

5. Parental enagement helps ensure pupil interest and attendance. Securing significant participation by illiterate parents requires appropriate participation structures and ongoing follow-up. BRAC staff hold monthly parent meetings and follow up absentee students with home visits.

6. Technical expertise may be less important than managerial expertise in developing a basic education program of adequate quality. The success of NFPE's programs is due less to the rigor of BRAC's original design and more to its willingness to "learn as it goes" and its determination to fully implement its basic approach. ♦

This article is derived from recent work on BRAC conducted by a joint USAID, UNICEF and Rockefeller Foundation team. The team included Colette Chabbott, Manzoor Ahmed, Arun Joshi and Rohini Pandi. Copies of the completed case study on BRAC will be available after September 1993 from Project ABEL, AED, 1255 23rd Street NW, Washington DC 20037, USA.

User Fees continued from page 11

addition, differences in earnings between secondary school leavers and university graduates have fallen dramatically over the past 20 years. This further erodes the value of education. We cannot know the precise effects of increasing direct costs of education through user fees in such contexts. But there are certainly grounds for concern about the effects of such policies on equity and the composition of the student population.

Efficiency and Equity. Even if gross enrolments are not affected by user charges, the composition of the student body is likely to change to reflect ability to pay rather than ability to learn. This has major implications for the technical manpower capacity of countries with skill shortages.

Student aid schemes for bright but poor children have been suggested as a way of mitigating the equity and efficiency costs of user charges and private sector provision. Yet scholarships schemes in Europe have not efficiently captured intended beneficiaries. There is little reason to suppose other regions will do better. Unless scholarships are provided on a sliding scale, families just above the maximum level of income qualifying for scholarship

would be disadvantaged. Such a system would doubly disadvantage the non-bright poor, who would neither qualify for scholarships nor be able to afford private schools.

Student loans (at tertiary levels) have also been proposed as a way to retain the benefits of the market without excluding the poor. By taxing the future income of the student rather than the family, student loans are more equitable than fees. Even so there are costs to taking out loans, and such costs weigh more heavily on the poor. Moreover, loans to be paid back in the future do not solve the government's short-term finance problems. Finally, repayments of student loans will not increase educational resources unless future governments earmark such funds for education.

School fees in sub-Saharan Africa exemplify market solutions that are not likely to work. They are strategies to shift rather than reduce costs. A more efficient and equitable way of raising additional education resources would be to increase rates of taxation in the context of a progressive tax structure. Opportunities for fiscal reform are not limited to increasing rates of direct taxation on individuals. Various

reforms to accompany taxation are desirable in many countries, including payroll taxes on individuals trained to high levels at public expense. Significant opportunities to reduce educational costs exist in most countries (Colclough with Lewin, 1993), even in those African cases which are amongst the poorest and most indebted. ♦

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The material for this article is taken from Christopher Colclough, "Who Should Learn to Pay? An Assessment of Neo-liberal Approaches to Education Policy," in Christopher Colclough and James Manor, eds, States or Markets? Neo-liberalism and the Development Policy Debate. Oxford: Clarendon Press, 1991. Christopher Colclough is a Fellow at the Institute of Development Studies at the University of Sussex, Falmer, Brighton BN19RE, England.

Finance Statistics

The following statistics provide a glimpse into some of the ways public money is used.

Public unit expenditures, all levels of education, 1988 (1988 \$US) (a):

Developed countries:	\$2,888
Least developed countries:	45

Average public spending on instructional materials, 1985 (1985 \$US) (b):

High income countries:	\$52.40
Upper middle income countries:	5.50
Low income countries:	0.80

Total school enrollment, all levels in 1988 as a percentage of school enrollments in 1970, least developed countries (a): 248

Percentage of age group enrolled in (a):

Tertiary education, Sub-Saharan Africa, 1970:	0.5
Primary education, Sub-Saharan Africa, 1970:	46.3
Tertiary education, Sub-Saharan Africa, 1990:	2.1
Primary education, Sub-Saharan Africa, 1990:	76.2

Difference between Number of Years to Produce a Graduate and Years in Primary School System (b):

Low income countries, 1970:	8.6
Low income countries, 1980:	4.5
Low income countries, 1985:	5.2

Repeating girls as a percentage of girls enrollment (b):

Low income countries, 1965:	21.1
Low income countries, 1985:	10.9

Social rates of return, 1970s, percentage (b):

To tertiary education, developing countries:	13
To primary education, developing countries:	24
To tertiary education, Sub-Saharan Africa:	13
To primary education, Sub-Saharan Africa:	28

Ratio of unit expenditures in tertiary education to unit expenditures in pre-primary, primary and secondary education (a):

Developing countries, 1975:	11.4
Developing countries, 1985:	7.0
Developed countries, 1985:	3.3
In Sub-Saharan Africa, 1975:	35.7
In Sub-Saharan Africa, 1985:	22.1

Percentage of public subsidy of tertiary education captured in Chile 1983 by (c):

Poorest 30% of population:	15
Richest 30% of population:	61

Likelihood a child will die of malnutrition or preventable disease rather than war (d): 33 to 1

Estimated cost per year until the year 2000 (in addition to present expenditures) of providing every man, woman, and child on earth with adequate food, clean water, safe sanitation, primary health care, family planning, and basic education, in 1993 \$US billion (e): 25

Public expenditure on military, 1987 (1987 US\$ billion) (d):

Developing countries, 1987:	144
Developed countries, 1987:	722

Amount saved in the US in later special education, crime, welfare, and other costs for each \$1 spent on quality preschool education (g): \$3.00 or more

Amount saved in the US in later crime, welfare, and other costs and lost tax revenues for each \$1 spent for comprehensive job training, education, and support services (g): \$1.46

Amount saved in the US in later medical costs for each \$1 spent on childhood immunizations (g): \$10.00

Amount saved in the US in later health care costs for each \$1 spent on comprehensive medical care for pregnant women (g): \$3.38

Amount saved in the US in medical costs due to low birthweight babies for each \$1 spent on food and nutrition counseling for pregnant women (g): \$3.13

Annual cost of foreign experts in Sub-Saharan Africa, in US\$ billions (f): 4 - 5

Total estimated decrease in income due to stagnant or declining export volumes, Sub-Saharan Africa, 1970-1988, in US\$ billions (f): 9 - 10

Total debt service, Sub-Saharan Africa, 1970-1988, in US\$ billions (f): 9 - 10

Military expenditure as a percentage of health and education expenditure (h):

Least developed countries, 1977:	89
Least developed countries, 1990 :	146

Soldiers per doctor (h):

Least developed countries	77
World	15

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- UNDP, 1993. *Human Development Report 1993*. New York: Oxford University Press.

Additional Reading

In addition to the sources listed in the articles, interested readers may wish to refer to:

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Knight, John B and Richard Sabot, 1990. *Education, Productivity, and Inequality: The East African Experiment*. New York: Oxford University Press.

Mingat, Alain and Jee-Peng Tan, 1988. *Analytical Tools for Sector Work in Education*. Baltimore, Maryland: Johns Hopkins University Press.

What's Happening

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Negara Brunei Darussalam

Contact: Secretary, Organising Committee
"Towards Education for All"
Faculty of Education
Universiti Brunei Darussalam
Gadong 3186 Brunei Darussalam
Tel: 673 2 427001 / Fax: 673 2 427003

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Singapore

Contact: Educational Research Association
Conference Secretariat Office
c/o Tele-Temps Services
1002 Toa Payoh Industrial Park #06-1475
Singapore 1231
Fax: 65 253 2228

24-28 September 1993

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Oxford, England

Contact: W I Ozanne
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Tel/Fax: 021 449 3339

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Contact: M. Ed. Grace Castro Torres
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Ciudad Universitaria Rodrigo Facio
San José, Costa Rica
Tel: 506 340901 (M.Sc. Mayela Cubillo Mora,
CICAP)
Fax: 506 340452 (Rectorat)

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The Open Learning Institute of Hong Kong
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Brighton, United Kingdom

Contact: The Conference Co-ordinator
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Falmer, Brighton BN1 9RG
United Kingdom

* Listing provided courtesy of the bulletin of the International
Association of Universities; IAU/Unesco Information Centre on
Higher Education, International Universities Bureau, UNESCO.

Closing Thoughts

It is now actually possible to provide virtually every man, woman, and child on earth with adequate food, clean water, safe sanitation, primary health care, family planning, and basic education — by the end of the century and at an affordable price ... We need to put children first, paying special attention to the girl child.

— James P Grant

"Children and Women—The Trojan Horse Against Mass Poverty?" address given to the International Development Conference 11 January 1993, Washington DC, USA

The only basis for "optimal" resource allocation practice is one centered on process, because optimal depends on one's perspective. ... If the "technical" is simply hidden politics, a "good" allocation of resources should depend on setting better, more open, political processes to make choices.

— Steven Klees

"Resource Allocation and Social Choice in Education: Suggestions to the World Bank as to Alternative Criteria and Processes" Paper presented at the Comparative and International Education Society Annual Meeting 16-19 March, 1993, Kingston, Jamaica

Our guiding principle in the design of a choice system is this: public authority must be put to use in creating a system that is almost entirely beyond the reach of public authority. ... we think the best way to achieve significant, enduring reform is for states to take the initiative in withdrawing authority from existing institutions and building a new system in which most authority is vested directly in the schools, parents, and students.

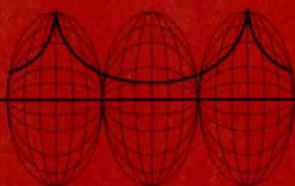
— John Chubb & Terry Moe
Politics, Markets and America's Schools

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