

# EDUCATIONAL PLANNING

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The Journal of the International Society for Educational Planning  
PROMOTING THE STUDY AND PRACTICE OF EDUCATIONAL PLANNING





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**EDUCATIONAL PLANNING**  
A JOURNAL DEDICATED TO PLANNING, CHANGE, REFORM, AND THE  
IMPROVEMENT OF EDUCATION

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## PREFACE

Linda K. Lemasters

There are three articles in this issue of our journal, the third issue this year. Once more there are several persons that are due appreciation for their assistance with getting the journal ready for publication. *Glen Earthman* has continued to make sure that the printing and mailing are done in an effective and timely manner. Most importantly he is always nearby for advice and consultation. The Editorial Review Board assisted with the juried reviews, as well as three guest reviewers: *Carleton Holt*, *Russell Mays*, and *Tim Toops*.

This journal is a venue in which we would like to showcase meaningful research on planning and change. The International Society of Educational Planning (ISEP) encourages the readership to submit their research documents and articles. School leadership is experiencing success in student achievement as a result of planning and making changes based on strategic thinking. We need to get this word out, as certainly all of us are bombarded with the news when success is not achieved. Not only do we want your articles, please note at various conferences, with your other professional organizations, and with your colleagues at your university that we are interested in their research as well.

I especially would like to thank the authors of the articles in this issue; they accepted the suggestions of the reviewers and revised their work in a very timely manner. Appreciation goes out as well to the ISEP Board and the membership for their support and willingness to help.

Please note that we are publishing in Volume 16, No. 3, a personal account by *Guy Benveniste* of the creation of the International Institute for Educational Planning (IIEP). Although the reviewers generally do not recommend this type of article, the ethnographical account is important for the members of ISEP to better understand the genesis of such an organization and its international impact on educational planning. Dr. Benveniste's writings establish the intended scope and importance of our mission. Most of all, we are indebted to such leaders in IIEP and ISEP, who have reminded all of us in the past and continue to do so in the present that without planning, our missions become neglected and accidental occurrences fill the spaces of deep, meaningful, sustained change.

The authors have added to the body of knowledge in planning and change. It has been a pleasure to work with them and the reviewers; please enjoy the product of our collective efforts.

## ABOUT THE EDITOR

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## ABOUT THE AUTHORS

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# CREATION OF THE INTERNATIONAL INSTITUTE FOR EDUCATIONAL PLANNING

Guy Benveniste

## ABSTRACT

*This is a personal account by Guy Benveniste, now retired from the Berkeley faculty, of his participation in 1961-1963 in the creation of the International Institute for Educational Planning (IIEP) at UNESCO in Paris. The account covers the early days of financing education at the World Bank (IBRD), UNESCO's early interest in educational planning including various major regional Ministers of Education Conferences for Asia and Africa, and the UNESCO Santiago Conference of Ministers of Education and of Economic Planning in March 1962. The account focuses on the problems of coordinating foreign aid to education and the potential conflicts that might arise as the World Bank began to finance education projects. Benveniste relates how various multilateral and bilateral agencies sought to avoid potential conflicts by agreeing to establish an autonomous institute that could assist in such coordination. He goes on to relate how UNESCO finally reached a direct agreement with the World Bank, how meanwhile the Institute was established, and how the Institute began to train educational planners and conduct research. The account provides many details on the bureaucratic intricacies of creating a new international agency. It points out that what finally happened was not exactly intended and the path of change is not always straight. The account ends in March 1963 when the IIEP held its first seminar.*

## INTRODUCTION

I have written this personal account to contribute to the documentation about the history of the educational planning movement. Personal accounts are shaped and limited by memories and documentation. I happen to have been involved between 1961 and 1965 with the US aid program, educational and cultural affairs at the State Department, education at the World Bank (IBRD), and the first years of the International Institute for Educational Planning (IIEP) at the United Nations Educational, and Cultural Organization (UNESCO). John Hall, now retired from the IIEP, has been most helpful in finding and transmitting relevant documents and editing this text. My account pays attention to the strategies pursued by organizations. I will show that the IIEP was born out of concerns at the World Bank and UNESCO, the Ford Foundation acting as catalyst (or midwife). I also will want to illustrate that bringing about change involves many people in different roles and results from a fair amount of fortuitous and unpredictable events. My account is based on personal experience, the people I knew at the time, the changing roles we played. Like all personal accounts, it is incomplete.

## PLANNING

In the 1950s and 1960s planning was considered necessary for the economic and social development of third world nations. As backdrop there was the experience of socialist countries. There was indicative planning in France. There had been planning during World War II and subsequently in British overseas territories. There also were management considerations. It was argued that "rational integral planning" would avoid the inevitable disorders, waste, corruption, or overlap of plain everyday politics. Importantly, it would allow the coordination of bilateral and multilateral public and private foreign aid. There existed no consensus about the meaning of "planning." No one could state what worked or did not. This explains why the IIEP was conceived, in June 1962, as a place where, "The results of the work going on throughout the world can be brought together; where a synthesis, so to speak, of this work can take place; where new ideas can be advanced and discussed and where practitioners and potential practitioners in educational planning can take courses and get useful experience" (UNESCO, 1962, p. 1).

## UNESCO

In the late 1950s UNESCO became fully involved in planning promotion, discourse, and action. But our story begins elsewhere. In Colombia, Ricardo Diez Hochleitner, a young Spanish engineer who had completed a plan for technical education, was recruited in 1956 by the recently appointed Minister of Education Gabriel Betancourt-Mejia, to prepare a Five-Year Overall Education Plan along the lines

of the development policies pursued by Dr. Raoul Prebisch, the influential head of the UN Economic Commission for Latin America (ECLA). Several years later, in June 1958, Ricardo Diez Hochleitner was in Washington at the Organization of American States (OAS), undertaking the first Inter-American Conference on Overall Educational Planning, so as to share more widely the Colombian initiative. At that point in time, he was recruited by Luther Evans, then UNESCO's Director General, to come to Paris as an expert in educational planning. In that capacity he laid out a broad program of proposed planning activities for UNESCO. These included regional conferences, establishing regional training centers for educational planners, sending advisory missions on educational planning at the request of member states, and last but not least, the idea of creating an International Institute for Educational Planning (Diez Hochleitner, 2007).

With funding from the UN Special Fund and later the Development Program, UNESCO began sending planning missions to various third world countries. Malcolm S. Adiseshiah, then UNESCO Assistant Director General, an economist and student of Lord Keynes, was encouraging many of these activities together with René Maheu, the Deputy Director General who was to become the new DG in 1961. At the same time UNESCO organized a succession of meetings of Ministers of Education. Broad and bold target plans for primary education in Asia were discussed: at Karachi in late 1959, for primary and secondary level for Africa at Addis Ababa in May 1961, and then at a meeting in Tokyo in April 1962 when the Asian targets of Karachi were reviewed. At all these meetings the need for training educational planners and to coordinate external assistance was stressed. A major meeting bringing together Ministers of Education and Ministers of Planning was to take place later in March 1962 in Santiago, Chile (Cerych, 1965). By then UNESCO had become concerned that economists and planners also should attend. Michel Debeauvais, of the French Institute for the Study of Economic and Social Development (IEDES, Sorbonne, Paris), was asked by René Maheu to travel to Latin America before the Conference to ensure that both Ministers of Education and Ministers of Planning be present in Santiago (Debeauvais, 2007).

One reason for this concern was that UNESCO was not the only international organization moving in the new field of the economics and planning of education. In 1961 the Organization for Economic Cooperation and Development (OECD) replaced the Marshall Plan's Organization for European Economic Cooperation (OEEC) created after General Marshall's speech at Harvard on June 5, 1947. The OEEC and later the OECD were concerned with chronic and persistent shortages of scientific and trained workers. This brought them to establish in the late 1950s a Study Group on the Economics of Education. This Group began a series of studies and activities, including a concern for the organizational aspects of education and manpower planning. At the beginning of the 1960s the OECD was planning two major activities in education: an international conference to take place in October 1961 in Washington on the Economics of Education and a major multi-country manpower planning project called the OECD Mediterranean Regional Project involving Portugal, Greece, Italy, Spain, Turkey and Yugoslavia (Gass, 1967).

As these international organizations moved in a new field of activity, there were many opportunities for both cooperation and competition between them. And at this point a third actor emerged: The World Bank.

### THE WORLD BANK (IBRD)

In September 1960 the scope of lending at the International Bank for Reconstruction and Development (IBRD) was expanded. In addition to providing loans financed on the world's bond market, a soft loan (low interest) window was added: The International Development Association (IDA). It was financed mostly by member state contributions. Soft or low interest loans were intended for countries or projects that were not expected to rapidly create economic wealth and consequently were less able to repay conventional loans.

With the IDA in place, the financing of education and other social sectors became possible. Until then, the Bank had concentrated on infrastructure projects such as dams, ports, roads, power plants, and railroads. There had been long delays in initiating and terminating projects, and these delays were often due to insufficient educated and trained workers. A mission to Tunisia headed by Andrew Kamarck, Director of the IBRD Economic Development Institute, had found that the economic infrastructure left

by the French was under utilized. There was no need for the kinds of loans the Bank made. What was needed was more entrepreneurial activity. This led to thinking about investing in education (Kamarck, 2007). As economists formulated the notion of human capital, they provided a rationale and methodologies to justify investments in education. The IBRD moved into education. At first, the Bank would assume that the expected additional stream of income generated by more educated workers would legitimize such investments, just like savings in the maintenance of lorries provided legitimation for road investments. Later, in 1963, the Bank would consider using manpower forecasting for that purpose (Heyneman, 2005).

In 1961 the Bank began searching for staff to carry on educational investments. The first selected to head the new education group was Ricardo Diez Hochleitner. At that time he was still working in Paris but also helping Gabriel Betancourt-Mejia who was now at the Organization of American States (OAS) in Washington. They were elaborating a Ten Year Education Plan for Latin America under the “Alliance for Progress,” which President John F. Kennedy had called for in his inaugural address on January 20 of that year. That plan would be issued in 1963, but meanwhile Ricardo was commuting back and forth each week between the two capitals. The second selected was Duncan S. Ballantine, former president of both Reed College in Portland, Oregon, and Robert College in Istanbul. He was to go on a Bank mission to Colombia, to take place early in 1962, and would join the staff later. And I was the third to be selected. I was working on economic development at the Stanford Research Institute in California and had been lent to the Labouisse Task Force. President Kennedy, very soon after his inauguration, asked Henry L. Labouisse to head a task force to reorganize US foreign assistance programs. This work led in September 1961 to the Foreign Assistance Act, which separated military from non-military aid. In November the President established the US Agency for International Development (USAID). To return to our account: Mr. Labouisse, a UN civil servant, recommended me to the World Bank, and I was invited to join the Bank staff in November 1961.

### PHILIP H. COOMBS AT THE STATE DEPARTMENT

I declined the Bank offer. Instead, I accepted to become a Special Assistant to the first American Assistant Secretary of State for Educational and Cultural Affairs. Philip (Phil) H. Coombs had come from the Ford Foundation to join the Kennedy administration, at the suggestion of Chester Bowles who remained Under Secretary of State for only 10 months in 1961. I joined Phil on December 1, 1961. The new unit at the State Department had many tasks, and these were exciting days. Phil was very busy as mentioned in his own recollections of the origins of the IIEP. He had much to do with improving cultural relations with the Soviet Union. He also chaired in October 1961 most of the sessions of the Organization for Economic Cooperation and Development (OECD), the Washington Conference on Economic Growth, and Investments in Education. There, for the first time, he floated the idea of having the OECD and UNESCO jointly sponsor an institute for educational planning (Coombs, 1992).

I had three tasks early in 1962: a) To prepare the US position for the March 1962 UNESCO Santiago Conference; b) To plan and undertake a mission to Spain to identify post Franco leaders who could be invited to the USA under our cultural exchange programs. At that time, Gabriel Betancourt-Mejia and Ricardo Diez Hochleitner had many contacts with Phil. I worked closely with Ricardo on arrangements for that mission; and, c) Phil had been asked by President Kennedy during a White House meeting to make sure USAID paid attention to education. I was to coordinate that activity. I therefore attended interagency meetings. During that period USAID was shifting from providing direct budgetary assistance to foreign governments to insisting on host country national planning to guide US allocations of aid for broader long-term development. The British were already insisting on five year plans for its colonies as a condition for receiving assistance under the Colonial Development and Welfare Acts (Williams, 2007).

I attended the Santiago Conference in March 1962 with Phil. This is a story in itself and I will not go into much detail. Suffice to say that the US Delegation was very heavily involved with the UNESCO Secretariat and the Director General in discussions of what a “plan for Latin American Education” could be or could mean. The UNESCO Secretariat, actually a young American statistician named Erwin Solomon, prepared a region-wide target plan for primary, secondary, and higher education similar to

the plans prepared at Karachi and Addis Ababa. He had used target enrollments and obtained their estimated cost. He then had used the GNP estimates of a well-respected economist, Paul Rosenstein-Rodan, and applied target percentages to be devoted to education by Latin American governments to obtain resources. The difference between costs and resources had to be provided by donors, and a formal commitment for earmarking this level of aid was sought at the Conference. The US Delegation insisted that planning had to take place at the country and not the regional level. In that regard we reflected very recent US policy. USAID had just decided to tailor its programs to host country integrated national planning. At a rather dramatic plenary session of the Conference, Phil, helped by Rashi Fein, a member of the President Kennedy Council of Economic Advisers and on our delegation, demonstrated that if one used the estimates of future GNP, targeted at Punta del Este early in 1961 for the "Alliance for Progress," which were higher than those of Rosenstein-Rodan, the proposed plan resulted in a surplus and no foreign aid was needed. How could the "Declaration of Santiago" repudiate the "Alliance for Progress"? As a result René Maheu got to know Phil and me quite well as we participated in endless and sometimes heated negotiations. A compromise was reached. The "Declaration of Santiago" called for countries to elaborate national plans including education. Several delegations asked for foreign aid coordination. But the "Declaration" also urged the signatories of the "Alliance for Progress" to target no less than 15% of public foreign aid to education (Cerych, 1965, pp. 19-20).

I went to Spain in April 1962. While there, to my complete surprise, I received a cable from Phil informing me that he had resigned from the State Department effective April 19. I returned to Washington on April 28. Phil was not in town. I immediately arranged to have lunch with Arthur Schlesinger, Jr., who was a Special Assistant to President Kennedy. Schlesinger told me that Phil had been testifying in Congress to obtain a larger budget. He had lectured Congressman John J. Rooney, a Democrat from Brooklyn, New York, for past failures to sufficiently fund cultural affairs at State. Rooney, who chaired Appropriations for State, did not appreciate this. He placed considerable pressure on the President to get rid of Phil. The President had resisted several previous Congressional attempts to dislodge other appointments. By the time Rooney complained, President Kennedy felt it was time to assuage Congress. Phil was told to resign immediately. He was told to announce he was returning to the Ford Foundation in New York, which was not true. Schlesinger admitted that the firing had been far too draconian: "Someone goofed somewhere."

I attended the swearing in of his successor Lucius (Luke) D. Battle. I called the World Bank. I was told the offer from the previous November was still good. I accepted it. We were in early May 1962. I would transfer to the Bank staff on June 8, 1962. Meanwhile Phil, who had not gone to the Ford Foundation, was in Essex, Connecticut, and at times in Washington at the Brookings Institution.

#### THE CONSULTATIVE COMMITTEE ON THE IIEP: JUNE 25-26, 1962

Before leaving my post in the State Department, sometime in May, a request from the US mission to UNESCO landed on the desk of my colleague Robert H. B. Wade for an American expert to attend a meeting on the IIEP in Paris in June. We shared an office, and he consulted me. Time was very short; I recommended myself. Wade and I went to see Lucius Battle, and Battle accepted to send me. Wade also would go to Paris later. He became permanent US representative to UNESCO in 1964.

During the rest of the month of May 1962, I spent considerable time consulting about the IIEP. I went to New York to meet with the Ford Foundation. I went to the Bank and met with Ricardo Diez Hochleitner and Hugh Ripman, who headed Technical Operations where the education group was housed. I also consulted with Phil on the phone. As he relates, in his account of the origins of the IIEP, René Maheu had contacted him (Coombs, 1992). We discussed the idea of the IIEP and the need for autonomy. The Bank and the Ford Foundation had management concerns. They were preoccupied with the duplication and potential conflict between international and bilateral missions sent to advise on education. Potential conflict between the recommendations of different missions could lead to conflict between donors. Planning was seen as a way out. It had already been suggested that the Organization for Economic Cooperation and Development (OECD) might undertake this function since the membership of the OECD included the principal donors. But the OECD was not part of the UN. UNESCO was strongly opposed to that idea. Instead, the institute Ricardo had included in his original plan of action

for UNESCO and that Phil had suggested at the OECD Conference was now taking shape. It would be sponsored by the Bank and UNESCO and other donors. It would be able to send missions to coordinate the actions of donors. The Ford Foundation was interested. Ricardo discussed it with other Bank directors including Richard H. Demuth who would undertake the necessary negotiations later on. The idea of the IIEP took importance. All these conversations centered on the idea of an autonomous institute. Many suggestions were made as to how to achieve autonomy. These went as far as suggesting that the IIEP be created as an autonomous new institution with its own international treaty within the UN. That idea was obviously far fetched, but it indicates the level of preoccupation.

I attended the Paris meeting of the Consultative Committee. By then, I was already on the staff of the Bank, but went there as representing the State Department. Harry Curran of the IBRD Paris office represented the Bank. At first, the Committee was chaired temporarily by Malcolm Adiseshiah, UNESCO's Assistant DG. I happened, by chance, to sit next to Hellmut Becker of the Max-Planck Institute for Educational Research in Berlin. He knew Phil, and when he found out I had worked for him, he asked what had happened to Phil, why he had resigned from the State Department. I recounted the story and told him also about my consultations with the Ford Foundation and the Bank. At the start of the meeting, Malcolm Adiseshiah informed us we would elect our Chair and Vice Chair, and that UNESCO would provide the rapporteur. I did not know what the rapporteur did at such meetings. To my surprise Becker objected strongly and nominated me as rapporteur. I was elected. I did not know our elected Chair, Sir Alexander Carr Saunders, but I had worked in Santiago with Paulo de Berrêdo Carneiro, the Vice Chair. The rapporteur, I found out, writes the final Committee report and has therefore some limited influence on the outcome.

At one point, I was able to brief the Committee about my conversations at the Bank and the Ford Foundation. I explained why the Bank and the Foundation thought that an autonomous institute, benefiting from academic independence to conduct research, also would be able to send impartial missions to coordinate donor aid to education. I mentioned that they might be willing to support the Institute at least in its formative years. But Malcolm Adiseshiah objected. It was clear to him that UNESCO and only UNESCO should send such missions and be responsible for aid coordination. After all, UNESCO was the "conscience of the world on education." He also saw autonomy in a different light. He argued that the UNESCO Institute of Education in Hamburg, Germany, had sufficient autonomy. The DG appoints each member of their Governing Board, and he also appoints the Director. But they run their own programs. The UNESCO Institute in Hamburg had more autonomy than the IBRD Economic Development Institute, which, he pointed out, was a mere department within the Bank. Why insist on so much autonomy for the IIEP? The final report I wrote in July stated that "a lengthy discussion" took place. As I recall, Hellmut Becker took a leading role in our discussions of the IIEP statutes. Those finally recommended by our Committee gave more autonomy to the Institute than those adopted later on by the General Conference. We had the Board both select and appoint the Director. The DG only appointed his representative on the Board. Other members of the Board were appointed by other UN institutions or elected by existing Board members. Malcolm Adiseshiah dissented, and this was noted in the report. The report also stated that the Institute, once staffed and established, would send missions to advise on foreign aid. Malcolm Adiseshiah again dissented and he promised to draft further documents on the subject. That matter did not appear settled.

Before leaving Paris I met with René Maheu. I brought him up to date on the work of the Committee, and we discussed the resignation of Phil Coombs. I explained the situation at the World Bank, the mission and autonomy problem. We discussed the possibility of having Phil head the Institute and the fact that Phil would be seen as a desirable Director by both the Bank and the Ford Foundation.

## THE EDUCATION DIVISION AT THE WORLD BANK

At the end of June 1962, Ricardo Diez Hochleitner, head of our new education group, Duncan Ballantine, and I were at the Bank under Hugh Ripman, in the Technical Operations Department. The formal creation of the Education Division did not take place until February 5, 1963. Ballantine went to Tunisia in an "accelerated" mission in the footsteps of a fall 1961 UNESCO mission headed by Michel Debeauvais of IEDES in Paris. A first IDA soft loan for education was made to Tunisia as early as

September 1962 (Ballantine, 1986).

We had several tasks: First, we had to convince more traditional European finance people that investments in education would not reduce the attractiveness of Bank bond issues. With the help of Americans, familiar with school bond issues, we were able to assuage these fears. Second, we had to have our methodologies accepted within the Bank. We argued that expected additional income streams could justify investments in education because that methodology seemed more similar to the methodologies used in other sectors financed by the Bank such as transportation. This would mean the Bank would tend to select vocational training investments, in contrast to UNESCO, which, until then, would tend to want to articulate the various components of education systems. This led us back to the issue of mission conflict. I briefed the Bank and the Ford Foundation about the Paris meeting on the IIEP and went to work as rapporteur of the Consultative Committee. At this point in time a tentative decision to sponsor an autonomous Institute was emerging.

In September 1962, I went on a month-long Bank mission to Afghanistan to study a second soft loan for education. The mission was headed by Ahmed Tukan, a Palestinian educator. We were concerned about aid coordination and visited UNESCO in Paris, FAO in Rome, the UN Economic Commission for Asia in Bangkok, and the Ford Foundation in New Delhi. Later, Ricardo Diez Hochleitner would head a mission and make several visits to help the Royal Afghan Government formulate their request. The second soft loan for education was approved for Afghanistan in 1964.

Meanwhile, in that summer and early fall of 1962, Ricardo Diez Hochleitner found time to work with me on IIEP matters. The Bank, UNESCO, and the Ford Foundation were exchanging formal indications of intent to finance the IIEP in its initial years if and when approved by the UNESCO General Conference. Ricardo was drafting the letters the Bank was sending to UNESCO and the Ford Foundation. But his contribution did not stop there. He had contacts in the UNESCO Secretariat. He also drafted the responses of René Maheu to the Bank and to the Ford Foundation. During that period from June to September, the Ford Foundation acted as catalyst (or midwife). When problems arose or opposition began to build, we were able to point out, that “The Ford Foundation thinks it is a great idea” or, “The Ford Foundation would never approve of that” and when on the phone to someone at the Ford Foundation we would say, “But the Bank or UNESCO insist on it.”

### THE FORMATIVE IIEP

Upon my return from Paris in late June 1962, I sought out Phil to tell him about the Paris meeting, my conversations at the Ford Foundation and at the Bank. In all three institutions his becoming the first Director of the IIEP was seen as highly desirable. In fact, at the Foundation there had been considerable resentment at the shabby treatment Phil had received at the State Department. I found him in Essex, Connecticut. I told him about Paris, the Bank, and what his friends at the Ford Foundation wanted him to do. I also explained the opposition of Malcolm Adiseshiah. We had a good dinner at a fish restaurant, and this is when I first claimed I had “hired” Phil to become the first Director.

I kept in touch with Hellmut Becker who understood fully the procedures of UNESCO. He assured me everything would work out. He had made sure that his colleague Friedrich Edding would be involved in the three-person Working Party charged with reviewing the recommendations of our Consultative Committee just before the UNESCO General Conference in the fall of 1962.

In due time, Phil was invited by René Maheu to attend the General Conference and present the proposal for the IIEP. It was fortuitous that Phil knew the head of the Russian delegation, who was reportedly opposed to the idea. There was considerable uncertainty given the known opposition of Malcolm Adiseshiah, the Assistant DG. A concession was made. The Working Party modified, somewhat, the degree of autonomy we had recommended. The Board would select the Director but the DG would appoint. Thus a veto was provided to UNESCO. At that time the Bank was still concerned with the mission problem and the Institute was thought to be the solution. René Maheu supported the proposal. The General Conference voted unanimously to adopt the recommendations of the Working Party. The French Government pledged to provide it with a building.

Malcolm Adiseshiah was only defeated temporarily. The proposed role of the Institute as a sponsor of missions to coordinate foreign aid did not survive six months. People in the UN objected. If the Bank

was to begin to finance several social sectors, new institutes would have to be created. Such proliferation made no sense. UN pressure was applied on the Bank to reach an agreement with UNESCO. This agreement was reached later. As a result, in 1964 Ricardo Diez Hochleitner would transfer back from the IBRD in Washington, to head a new Office of Educational Planning and Finance at UNESCO under Gabriel Betancourt-Mejia, who, meanwhile, had become the Assistant Director General for Education. Malcolm Adiseshiah would become Deputy Director General in 1963. But the General Conference had voted: the semi-autonomous IIEP had been approved.

### EARLY DAYS OF THE INSTITUTE

Prior to the first meeting of the IIEP Board, while still in the US, Phil became the Director Designate of the Institute. As of January 1, 1963, I was assigned by the Bank to spend one day a week working for him in Washington. The Board had to be brought to life and meet. We had to make arrangements to obtain space and staff in Paris. In May the Bank asked me to accompany Phil for two weeks in Paris. We arrived on May 1, and stayed at the Hotel Duquesnes. We obtained three small offices in the basement of the UNESCO building. Madeleine Alpert, the first secretary, occupied one, Charles Berkowitch, our administrator, took the second, and Phil and I were to share the larger third one. This never worked when Phil was around, and I would retreat and occupy the “observer” desk of the World Bank in the General Conference auditorium. I was, after all, on the Bank staff. We saw no indication that the French Government was actively obtaining a building for us, as promised at the General Conference.

The Bank transferred me and my family to Paris in June 1963. I remained on the Bank’s staff until I could be appointed at the IIEP on October 14. The IIEP was to reimburse the Bank later. Those early days were spent preparing for a meeting of the Board, selecting the first staff members, and looking for a building. The latter took considerable time. We decided we could not wait for something to happen. We decided to embarrass the French Government. We would make appointments in various Ministries and ask if space could be provided for our Institute. The Ministry in charge of French refugees from the war in Algeria occupied a lovely building bordering the Champs de Mars on Avenue Charles Floquet, very close to the UNESCO headquarters in the 7<sup>th</sup> arrondissement. The work of that Ministry was coming to an end. We had high hopes for that location. The Minister was charming but could not help us. Phil also recounts our meeting with Andre Malraux, then Minister of Culture and with the Mayor of Paris. All these visits were unsuccessful (Coombs, 1992).

Meanwhile, I was still at my Bank desk in the auditorium on September 30, 1962, when Yuri Gagarin, the first man in space, addressed UNESCO. My desk was high in the back next to the center aisle. When Gagarin finished his speech, he came up the aisle followed by René Maheu. Gagarin saw me writing, maybe he thought I was an important newspaper reporter. He stopped, shook my hand several times and beamed. René Maheu looked very puzzled. I tried to mimic to him that I had no other place to work. Maybe that influenced Maheu: if I was such a good friend of Gagarin, the IIEP should get a building?

We needed space for the new international staff. Raymond F. Lyons, an English social scientist who had been a consultant on human resources at the OECD, and Raymond Poinant, a Frenchman who was the rapporteur for education under the French Plan and a member of the Conseil d’Etat, were joining us. We were arranging to transfer George Skorov, a Russian who had been on the staff of the World Economy and International Affairs Institute in Moscow, from his UNESCO appointment to the IIEP. Secretaries were being interviewed. Our new Board headed by Sir Sydney Caine, who was Director of the London School of Economics and included Hellmut Becker, was beginning to be concerned. Poinant and Maheu probably made phone calls. The French Government finally came to life, and we were offered a dilapidated villa, at 7, rue Eugène Delacroix situated on a very large lot. This was across the Seine from UNESCO headquarters, in a plush part of Paris: the 16<sup>th</sup> arrondissement. Phil accepted, although at the time it was supposed to be a provisional solution. We immediately asked for a temporary prefabricated conference building, which Poinant, who had worked on French standards for school construction, knew existed and could be readily obtained. Other new staff included Jane King. She worked on a catalogue of educational planning training and research institutions. Tony Wheeler worked on a bibliography of educational planning. Jacqueline Schwab became our librarian. Phil also hired two

consultants: John Vaizey of Oxford University to prepare a seminar at Bellagio on priorities for research and Hector Correa of Pittsburgh University to work on our first Latin American seminar. Other staffers included Monique Roche, Jacqueline Bouquemont (later to wed John Hall), Sonia Brodie-Smith, Nicole Leclerc (who worked with me), Monique Amand, and Harold Rose.

During five weeks, in April and May 1964, we held that first Latin American seminar in conference facilities at UNESCO headquarters (the prefabricated conference building was not erected in time). Some 80 or so participants came from nine Latin American countries, Europe, the Soviet Union, the USA, the UN, and several other agencies. Phil, Lyons, Poignant, and I were on hand. Good friends were there: Gabriel Betancourt-Mejia, now Assistant Director General for Education at UNESCO (father of Ingrid); Ricardo Diez Hochleitner, still at the Bank; Ladislav Cerych from the Atlantic Institute; Ronald Gass from the OECD; Albert Baez, head of the Office of Science Teaching at UNESCO (father of Joan); Fred Harbison from Princeton; Michel Debeauvais and Sylvain Lourié both at the time with IEDES in Paris (Sylvain, my best friend at the Lycée du Parc Imperial in Nice in 1941--we recognized each other at the seminar); Peter Williams of the Overseas Development Institute in London; and, many others. The seminar was a success. Interestingly, foreign aid assistance coordination was still a topic. Harry Curran of the IBRD mentioned the agreements being negotiated between the IBRD, IDA, UNESCO, and the FAO (Lyons, 1965). Many seminar participants would play important roles in the educational planning movement: both Poignant and Debeauvais would become Directors of the IIEP. Lourié also would head the IIEP and culminate his career as Assistant Director General for Planning, Budgeting and Evaluation at UNESCO. Ricardo Diez Hochleitner would serve four years at UNESCO to become, after 1968, Under Secretary of State for Education in Madrid where he initiated a major reform of Spanish education. He would conclude his career as President of the Club of Rome.

The last night of the seminar we held a roaring Latin American party at the old villa in the 16<sup>th</sup> arrondissement with food, music, and dancing. Roger Grégoire, head of the European Productivity Agency, was a seminar participant. He was a tall, imposing man, decorated member of the Conseil d'Etat. Raymond Lyons, our British senior staff member, was also tall, a careful man prone to wry humor; I would say very English. I want you, dear reader, to remember as I do, that late that night with all the music, at one point Roger Grégoire and Raymond Lyons were dancing a duet together on top of a desk to the acclaim of all of us.

The International Institute for Educational Planning had been launched.

## CONCLUSIONS

Much of our current literature on educational planning, or on planning in general, did not exist in 1961. We had very little experience. The field was new, at least to most of the education people with whom I was involved. We knew very little about politics. In fact, we distrusted politicians. We thought of planning as a technical professional activity divorced from politics. I would go on and publish *The Politics of Expertise* in 1972, but that was much later. At that time, many of us were involved in foreign aid and the problems of coordination of foreign aid loomed large. We hoped planning would help coordinate and rationalize these activities. The international and bilateral aid agencies were concerned with this problem and sought solutions. The OECD, UNESCO, IBRD, the Foundations, the bilateral aid programs were all interested. There were turf considerations. My purpose here was to show that this search led to the creation of an Institute with considerable autonomy. This IIEP did not solve the aid coordination problem, but it went on to widely contribute to research and training in educational planning. It is now a thriving institution with a large permanent modern building, which the French Government finally built on the same site: 7, rue Eugene Delacroix. You will ask me: "What is the lesson from all this?" I guess the lesson is that the path to change is not always straight, and our understanding of educational planning evolved and is still evolving.

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# TEACHING SCHOOL FACILITIES IN A PRINCIPALS' PREPARATION PROGRAM: USING ELCC STANDARDS

Tak Cheung Chan, Judy Patterson, J. Eric Tubbs, Daniel Terry, Earl Holliday, Roy Rowe

## ABSTRACT

*School principals need to be well prepared to manage school facilities assigned to their care. Educational leadership programs can make best use of the Educational Leadership Constituent Council (ELCC) Standards to develop a course of study to address school facility management issues. Every standard has its facility implications that lead to designing course activities to prepare school principals to be facility managers. A school facility management course can be effectively delivered by meeting all ELCC Standards.*

## INTRODUCTION

School facility management is an important aspect of the daily operation of a school. School principals have major responsibilities over the safety, healthfulness, and efficient management of the school buildings under their administration (Chan, McCleod, Bessette, & Whitson, 2005; Berry, 2002; Dunklee & Siberman 1991; Glatthorn, 2000; Shideler, 2001). Yet, many school principals are not prepared to address school facility issues (Chan & Ledbetter, 1999; Bradley & Protheroe, 2003; Brent & Cianca, 2001; Futral, 1993; Shafer, 1999). Many of them actually learn about facilities on the job by trial and error. Some of them may simply assign facility responsibilities to their assistant principals or school custodians who report to them about facilities periodically. The problem with the first case is that principals learn through making mistakes. Sometimes, mistakes could be very costly. In the second case, when principals leave the facility responsibilities to their employees they trust, they give up the opportunity of gaining first hand experience in handling facility problems and are always at the mercy of their employees. Both cases are unhealthy for the long-term development of principalship. Principals need to be well prepared to address facility issues of the school buildings to which they are assigned. To meet this significant facility need of principalship, principal preparation programs have major responsibilities in developing their curricula to ensure that candidates have the knowledge, skills, and disposition to independently handle school facility problems.

## ELCC STANDARDS: THE FACILITY IMPLICATIONS

Most principal preparation programs at the universities employ the Educational Leadership Constituent Council (ELCC) Standards (National Policy Board for Educational Administration, 2002) as guidelines to develop their programs and courses (Tubbs & Chan, 2006). The ELCC Standards consist of seven standards and each standard has its school facility implications.

Standard 1: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by facilitating the development, articulation, implementation, and stewardship of a school or district vision of learning supported by the school community. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to have professional vision and first hand knowledge of facility development of their school buildings and have included facility planning and maintenance as a component of the mission statements of their school improvement plans.

Standard 2: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by promoting a positive school culture, providing an effective instructional program, applying best practice to student learning, and designing comprehensive professional growth plans for staff. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to understand the conceptual background of how school facility impacts student and faculty performance, and thus create the conducive environment for

better teaching and learning. School staff that has the facility responsibilities needs to be included in the staff professional development programs.

Standard 3: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by managing the organization, operations, and resources in a way that promotes a safe, efficient, and effective learning environment. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to be aware of all the building codes, environmental codes, and fire safety codes to ensure safe and healthy environments for teaching and learning. Principals must be able to anticipate potential safety issues that need to be addressed before reacting to problems already spiraling out of control. Principals need to learn how a management team can help manage school facilities more efficiently (Bessette, Bowen, & Chan, 2006).

Standard 4: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by collaborating with families and other community members, responding to diverse community interests and needs, and mobilizing community resources. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to work with communities to share the use of school facilities and to involve the communities in planning and support of school facility improvement projects. They also need to be familiar with facility requirements to serve a diverse population.

Standard 5: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by acting with integrity, fairly, and in an ethical manner. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to employ their professional ethics to ensure fairness in the assignment of spaces and the distribution of equipment to all academic programs including the special education needs.

Standard 6: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Principals need to be fully aware of the political, social, and legal issues in relation to school facilities and to ensure that their schools stay in the forefront to reflect the significance of these issues.

Standard 7: Internship. The internship provides significant opportunities for candidates to synthesize and apply the knowledge and practice and develop the skills identified in Standards 1-6 through substantial, sustained, standards-based work in real settings, planned and guided cooperatively by the institution and school district personnel for graduate credit. (National Policy Board for Educational Administration, 2002)

*School facility implications:* Program candidates need to be fully involved with real school facility issues of today. Candidates will participate in hands-on facility planning and managing activities to resolve school facility problems.

## REFLECTING THE RATIONALE OF THE ELCC STANDARDS

As indicated in the section above, each of the ELCC Standards has implications for school facilities. In fact, each standard relates to an aspect of school facilities school principals need to know. The standards together serve as excellent guidelines to prepare principals to be school facility managers. The following tasks can be performed to reflect the rationale of the ELCC Standards:

### *Reflecting the Rationale of Standard 1:*

Educational leadership programs need to be designed to broaden the candidates' horizon of educational facilities by introducing the significance of school facilities in the education process. Candidates need to be prepared to conduct student enrollment forecasting and school facility inventory as part of the school improvement plan. Candidates should possess the skills to perform assessment and projection of educational facilities. Leadership preparation in this area relates to knowledge, skills, and disposition that can well fit in a leadership introductory course or a school business management course.

### *Reflecting the Rationale of Standard 2:*

Program candidates should be introduced to school facility journals, school facility websites, and the Educational Resource Information Center Educational Facility Clearinghouse so that they can conduct a search on literature relating to the environmental factors that contribute to teaching and learning success. Recognition of custodial staff and familiarization with their recruitment, assignment, supervision, evaluation, and professional development process should be included in the leadership curriculum. Preparatory work in this area is mostly facility knowledge and skills that can be taught in a curriculum and instruction course, and a school business management course.

### *Reflecting the Rationale of Standard 3:*

Program candidates should be introduced to ways to access the latest version of building codes, fire safety codes, handicapped codes, and health requirements that dictate the daily operation of school buildings. They should be able to create aesthetically functional environments to support teaching and learning activities by meeting all the codes. The programs should introduce various emergency plans and communication systems to be tested in the candidates' schools. Candidates should be taught how a management team could be organized and implemented to improve school facility management. Facility knowledge and skills identified in this section can be taught mostly in a school business management course.

### *Reflecting the Rationale of Standard 4:*

Candidates need to be prepared to recognize community involvement in support of school facilities by cultivating good public relations. They need to be familiar with the school facility planning process to keep the public informed of new facility development and status of construction process. The programs should prepare candidates to invite community representatives to serve on facility planning committees and to work on collaborative use of school facilities. Principals need to be aware of the levels of community involvement in facility planning. To respond to the needs of diverse population, principals need to be familiar with the facility accommodation of the school. Facility knowledge and skills in this section can be incorporated in a school public relations course and a school business management course.

### *Reflecting the Rationale of Standard 5:*

Leadership programs need to prepare candidates to be ethical facility leaders by brainstorming them with fairness and integrity in the distribution of physical resources across programs such as space assignments, locations, equipment and other resource support. The following questions can be very challenging to the candidates: When the school is running out of space, what program needs to be moved to portable classrooms? Who should be given priority in the use of computer technology in their programs? This section of disposition preparation can be embedded in an educational ethics course and a school business management course.

### *Reflecting the Rationale of Standard 6:*

Leadership programs should prepare candidates to be aware of the latest political, social, and legal issues that relate to school facility development and to reflect upon their significance to the school board to make wise decisions. Plenty of examples should be provided to get the candidates acquainted with the type of issues they need to be aware of. Newspapers, professional journals, television, radio, and

telecommunication should be widely used to track current political, social, and legal happenings for this purpose. Assignments should be given to candidates to present issues they noted for class discussion. Facility knowledge and skills in this section can be taught in a school law course, a social foundation course, and a school business management course.

#### *Reflecting the Rationale of Standard 7:*

Leadership programs should prepare candidates to understand the different aspects of principals' involvement in school facilities: managing existing facilities and planning for new construction and renovation projects. Every principal has to manage his or her school building. Opportunities may come to involve principals in new facility and renovation project planning. Since safe and healthy environment is the prime concern of school administrators, candidates should be assigned to work on daily routine upkeep of facilities. They should be all exposed to working with assistant principals to supervise facilities and also with custodians who actually work on facilities. Candidates should also be arranged to participate in gaining experience in planning new and renovation projects should opportunity arises. Knowledge, skills, and disposition in this area can best be taught in Practicum and Portfolio classes.

### KNOWLEDGE, SKILLS, AND DISPOSITIONS: IMPLEMENTING THE ELCC STANDARDS

The goal of the ELCC Standards is to provide guidelines to educational leadership program coordinators to develop programs to enhance candidates' knowledge, skills, and dispositions in educational leadership. An examination of all six standards indicates a close relevance of candidates' knowledge and skills requirements and educational facilities. Principals' dispositions in planning and managing school facilities are embedded in Standard 1 (School Vision) and Standard 5 (Educational Ethics). When knowledge is placed at the basic level of principals' facility preparation, disposition is indisputably considered an element at the highest level. A school principal has to be prepared not only to possess knowledge and skills to plan and manage school facilities, but also has to have the disposition to examine the entire picture of facility impacts and needs. Focusing on knowledge, skills, and disposition in facility preparation of school principals is in full support of the ELCC Standards.

### STRATEGIES TO PREPARE PRINCIPALS FOR FACILITY MANAGEMENT

In preparing principals for school facility management, some working strategies can be identified to supplement the ELCC Standards in providing guidance to the development of educational leadership programs. The authors have direct experience in employing these strategies in leadership programs that proved to work.

*Field experiences:* Involving program candidates in school facility planning experiences as part of their practicum has proved to be most beneficial to their understanding of the process in the real world. Visitation to school construction sites can be a very meaningful experience to them. Other activities could include visitation to professional facility planners to see exactly how systematic the process of planning and building schools has evolved.

*Professional guest speakers:* Guest speakers who have direct involvement with school facility management can be invited to speak in class. These speakers could include central office school planning director, principals experienced in facility planning, school design architects, and school maintenance director. Their live stories and examples could contribute to enriching the learning experiences of the program candidates.

*Hand-on activities:* Hand-on activities can help to teach certain facility planning skills that may be difficult to explain fully on paper. These hand-on activities may include projecting student enrollment, reading construction drawings and specifications, and using scale ruler, light meter, thermostat, and surveying equipment (Chan, 1998). Hand-on activities may also involve trying out new management techniques in schools.

*Case studies:* Real cases of facility planning and construction can be presented in class for discussion. Difficult situations created in these cases provide good learning experiences for program

Table 1

*School Facility Management: Knowledge, Skills, and Dispositions*

Standard	Knowledge	Skills	Dispositions
1. School Vision	X	X	X
2. Instructional Leadership; Professional Development	X	X	
3. Use of Resources; Safe and Health Environment	X	X	
4. School Community Relationship; Diversity Issues	X	X	
5. Educational Ethics	X	X	
6. Political, Social, Legal, Economic, and Cultural Context	X	X	
7. Internship	X	X	X

candidates. They challenge the candidates by requiring them to explore the many options by which these situations can be handled.

*Simulations:* Simulations of facility planning and construction activities can be very powerful class exercises for candidates to understand the roles and responsibilities of personnel involved in the planning and construction process. Planning to compile the educational specifications, holding public hearings to discuss facility needs, presenting school facility projects for school board approval, preparing to open bids for school construction, meeting with architects and contractors to resolve construction disputes are good examples of simulation practices (Holt, 2002).

*Professional Associations:* Program candidates should be made aware of the professional associations promoting educational facilities, such as the Association of School Business Officials International and the Council of Educational Facility Planners International. Candidates are encouraged to seek for membership in these professional associations, to present papers in their annual conventions, and to publish in their professional journals.

*Resources:* Major publications on educational facilities should be introduced to program candidates. ERIC Clearinghouse on Educational Facilities and other major university websites should be explored as significant sources of information. Abstracts of master theses and doctoral dissertations provide an overview of academic studies on educational facilities.

### CONCLUSION

Every school principal needs to have knowledge, skills, and disposition of school facility planning to be an effective facility manager of his/her school. As a supervisor of school custodial staff, the principal cannot be ignorant of the functional operation of the school building. He or she cannot afford failing to address facility concerns expressed by the public. University educational leadership programs have responsibilities to prepare school principals, who could effectively manage school facility functions. By following the directions of the six ELCC Standards, leadership program designers can foster school facility planning and maintenance experiences into the educational leadership curriculum. Activities of a professional practicum course can be designed to reflect greater involvement in school facilities. For years, educational leadership programs have not given enough attention to facility preparation of school principals. It is time to align our programs to ELCC Standards to prepare principals who can make good sense in turning bare school buildings to conducive teaching and learning environments.

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# THE CHANGE IN EDUCATIONAL INEQUALITY IN TURKEY: A COMPARISON BY REGIONAL

Ekber Tomul

## ABSTRACT

*In recent years increasing attention has been paid to equity issues in education. Equal access to education is one of the basic human rights to which all are entitled. In this study, school years and the case of changes in terms of gender and allocation units in Turkey in 1990 and 2000 are examined. When compared to 1990, school years of both male and female increased in all regions in 2000. This increase occurred more in the regions in which years of schooling were low. In 1990 and 2000, male years of schooling were higher than those of female in all regions. While the gap between male and female tends to decrease in the regions where the instructional period is longer, this gap has a tendency to increase in the regions located in the eastern and southeastern parts of Turkey. Male and female average years of schooling in Turkey are below the mean average of the world. Increase in average years of schooling, however, is over the mean average of the world. When it is considered in general, male and female years of schooling were low, and the gap between them was higher in the regions that take place in the eastern and southeastern parts of Turkey.*

## INTRODUCTION

In recent years increasing attention has been paid to equity issues in education. Equal access to education is one of the basic human rights to which all are entitled. Educational situation in a country not only enables the current social, political, and economic developments, but also it functions to provide forward momentum in these scopes. Education should enable citizens/individuals to have more control over their own life, to understand social and political issues, and to experience life in a regulated community outside the original family (Allodi, 2007; OECD, 2002). Nevertheless, inadequacies and inequalities in education are said to prevent economic and social developments (Abu-Ghaida & Klasen, 2004; Psacharopoulos & Patrinos, 2002).

Ram (1990) stated education has an equalizer power. Education not only takes part in economic development but also contributes to the achievement of social justice (Park, 1996). According to Preston and Green (2005) there exists a correlation between educational inequalities and political-social integration. As long as political freedom decreases, educational inequalities increase. According to Gyfason and Zoega (2004), increase in the general educational level strengthens both equality and economic growth. As noted by UNICEF (2005), education is also the best mean to provide social gender equality. Creating equality of opportunity and facility in education is believed to decrease social isolation by positively affecting the distribution of income, prosperity, and status (Frankema & Bolt, 2006; Istance, 1997; Mingat & Tan, 1996). That is why providing opportunity and facility in education is considered as a main human right (Qian & Smyth, 2005; Thomas, Wan, & Fan, 2001).

According to United Nations Children's Fund (UNICEF, 2005), there exists serious obstacles that hinder educational equality, such as poverty, working children, children kidnapping, allocation units in retired spots, inadequacy in infrastructure, ethnical origin, illiterate mothers, inner conflicts, natural disasters, and violence. Educational inequality is confronted, especially, in respect of gender and inadequacies in female education. The gap between male and female average years of schooling (AYS) is an important indicator of developmental differential (Siddhanta & Nandy, 2003). It is stated that female education increases personal income and creates social isolation by decreasing children's death and fecundity. As a result of this isolation of education, children can have better health and educational opportunities. By means of this, differences among generations disappear and equality of opportunity between those with high and low income is achieved (Abu-Ghaida and Klasen, 2004; Gorard and Smith, 2004; Gönenç et al, 2001; Shan and Younger, 2005).

International legal arrangements and action plans were held in order to provide everybody with access to educational facilities. The earliest two of these, the International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights, together

with the Universal Declaration of Human Rights, have been proclaimed by the United Nations to constitute the International Bill of Human Rights. They contain the provisions on compulsory and free primary education, and non-discrimination in education that were first set out in the 1948 Declaration. The two more recent conventions--the Convention on the Elimination of all Forms of Discrimination against Women and the Convention on the Rights of the Child--contain the most comprehensive sets of legally enforceable commitments concerning both rights to education and to gender equality. The most important of these was the United Nations Universal declaration of Human Rights in November 1948. In this declaration educational equality was emphasized as "education is a human right that must be provided for every human being; education must be free and even compulsory till secondary education level and higher education should be accessible for everybody" (UNESCO, 2004). The Alliances of International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights, generally propound that primary education must be free and compulsory and that equal opportunities must be enabled for everybody. The Convention on the Elimination of all Forms of Discrimination against Women and the Convention on the Rights of the Child not only advocated that there must be no discrimination between males and females in terms of educational facilities, but also they emphasized that education is a human right (UNESCO, 2004).

In many academic studies it is stated that there are universally serious inequalities between the educational level of males and females, despite the international arrangements and activities. The level of this educational inequality, however, depends on the countries' development levels, allocation units, age, and income groups (Abu-Ghaida & Klasen, 2004; Barro & Lee, 2001; Knowles, Lorgelly & Owen, 2002; Psacharopoulos & Patrinos, 2002; United Nations Development Program (UNDP), 2000; UNICEF, 2005).

According to the UNDP (2001), the education level of females at every income and age group was lower than that of males at the international level. The gap between male and female education, however, was decreasing. In his study with the data of 174 countries in the years of 1980-1988, Tomul (2002) stated that inequality between school years of males and females at and over 24 years old is on going. In the countries where the number of years of education is lower, the gap between years of schooling of females and males is higher.

Türkmen (2002) computed average school years of the labor force (15- 64 years old) in Turkey for the years 1980-2000. According to this calculation during the 20 year-period, school years of the labor force increased only at the rate of 0.85 school years (3.02 years in 1980 and 3.87 years in 2000). According to the study done by Tansel (2003), there was a positive correlation between educational level of females in Turkey and their ratio of attendance to labor force. As the educational level of female increased, the level of attendance to the labor force went up, too.

It is emphasized in academic studies that there exists crucial educational inequalities against females at regional and country levels. An OECD (2005) report stated that there were inequalities based on gender, allocation units, and school quality in Turkey. In the eastern part of Turkey, there are many females, who did not even complete primary education (UNESCO, 2004). There are many studies supporting the assessment of OECD and UNESCO about Turkey. These studies indicated that educational inequalities and inequalities related to gender constitute a great problem (OECD, 2005; Smits & Hoşgör, 2006; Tansel 2002; Tomul, 2005; Türkmen, 2002; UNICEF, 2005). These studies, however, were mostly done according to the data of literacy and the school foundations in a certain period throughout the country. Longitudinal studies according to regions are very limited.

AYS were computed by gathering the raw data related to the education of males and females at the age 24 and over living in the cities within a certain region. This study aims to compute AYS of males and females at the age 24 and over according to regions in Turkey and make an assessment according to the international comparison determining the gap and case of change between them. As raw and operated data, the results to be obtained are believed to be significant in terms of providing measurable and comparable data for social policies and decision making processes, which will be developed, and to evaluate the results of applied educational policies in Turkey.

## DATA SOURCES AND METHODOLOGY

In order to estimate educational inequalities, wide and comprehensive data are required. This study was completed using the data of the years 1990 and 2000 census of population. The raw data of this study was obtained from the sources of Social and Economic Characteristics of Population about the cities, which was published after the Census of Population in the years 1990 and 2000. In the study, average school years of 24+ year-old females and males were computed. This population was taken into consideration as this age group contains the ages to leave the formal education.

The survey covered all geographical regions throughout Turkey. The Turkish Statistical Institute (2006) divided Turkey into 26 second-level regions. School years were computed in terms of gender and regional level. AYS were computed by gathering the raw data related to education of males and females at the age 25 and over living in the cities within a certain region.

In order to determine the distribution of educational levels of a society and the individuals in that society according to gender, allocation units and income groups, several indicators such as literacy rate, enrollment rate, average years of schooling, standard deviation, and Gini co-efficient were used. It is stated that these scales have the quality to reflect the results of all investments and efforts done for educational process (UNDP, 1992; Thomas, Wang and Fan, 2000; Siddhanta and Nanday, 2003). In this study, the scale of average years of schooling (AYS) was used.

The distinguishing features of AYS have been increased in determining the educational level in the process of the information society. The scale of AYS, however, is just an average value. It does not give enough information about the distribution of educational level in the population. This scale reflects the average of general educational level and quality. Another important limitation is that a very detailed and wide raw data are required so that the scale of AYS can be computed (Barro & Lee, 2001; Knowles, Lorgelly & Owen, 2002; OECD, 2002; Psacharopoulos & Patrinos, 2002; Tomul, 2005; UNDP, 1998).

Data from the last graduated education institutions were used. In Turkey, school years according to the educational grades are classified as 5 years of primary school, 8 years of junior high school level, and 11 years of high school level. The higher education system in Turkey consists of associate degrees (2 years), undergraduate degrees (4 years), and graduate degrees. The 29th question on the year 2000 census questionnaire was from "what school did you graduate last?" Although there were choices such as collegiate school, faculty and master/doctorate, these were revealed as higher education graduates in the data published. Estimations were done depending on the school years of these educational grades.

The formula for calculating AYS at the five levels of education follows (Thomas, Wang & Fan, 2001):

$$AYS = \sum_{i=1}^n p_i y_i$$

- |                                  |   |
|----------------------------------|---|
| (1) Illiterate                   | : $y_1 = 0$                                 |
| (2) Complete-Primary             | : $y_2 = y_1 + C_p = C_p$                   |
| (3) Complete- Junior high school | : $y_3 = y_2 + C_r = C_r + C_p$             |
| (4) Complete- High school        | : $y_4 = y_3 + C_s = C_r + C_p + C_s$       |
| (5) Complete- Higher education   | : $y_5 = y_4 + C_t = C_r + C_p + C_s + C_t$ |

Where,

$C_p$  is the cycle of the primary education;

$C_r$  is the cycle of junior high school education;

$C_s$  is the cycle of the High school education; and

$C_t$  is the cycle of the Higher education.

## FINDINGS

### Trends of Education Attainment by Gender and Discussion

Male and female AYS, the change and the gap between male and female AYS by regions in Turkey, are given in Table 1. The changes in male and female AYS by regions in Turkey are given in Figure 1. The gaps between male and female AYS by regions are given in Figure 2, and the increase in male and female AYS by regions are shown in Figure 3.

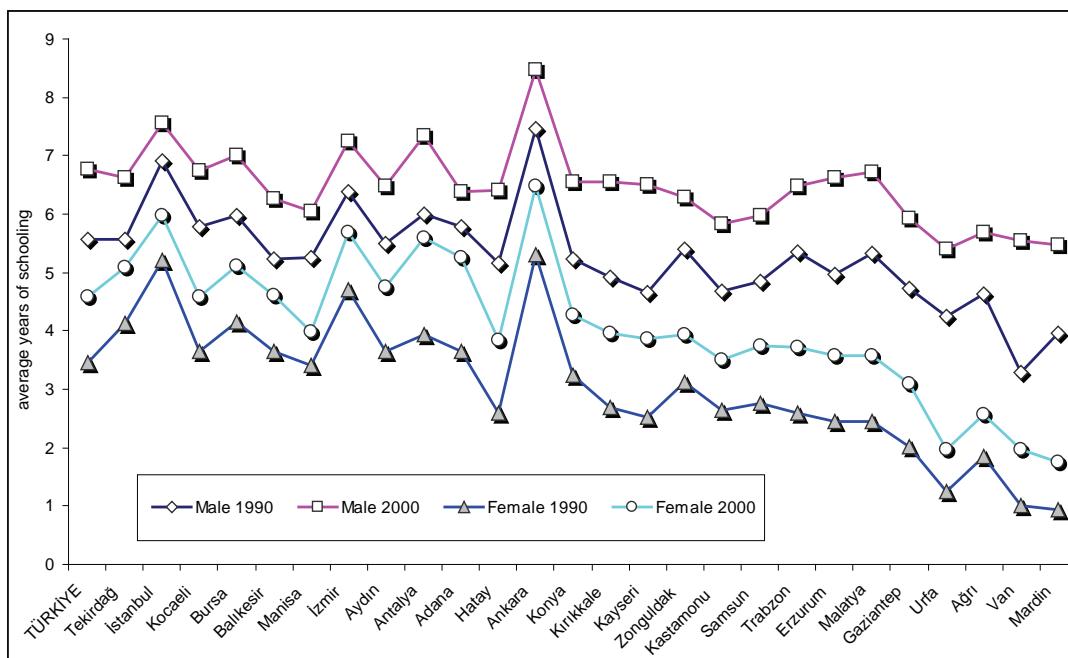
According to Table 1 and Figure 1, in all regions male AYS was higher than female during the years 1990 and 2000. In all regions female AYS in 2000 was lower than male AYS in 1990. The inequality involving females in 1990 continued in the year 2000 (Table 1; Figure 1).

According to the data in 1990 and 2000, male and female AYS was high in western regions of Turkey such as Istanbul, Kocaeli, Ankara, İzmir, Antalya and Tekirdag, whereas they are lower in southeastern regions such as Van, Mardin, Urfa, Ağrı and Gaziantep (Table 1, Figure 1). Male AYS is lower than AYS of Turkey in 18 regions in 1990, but in the year 2000 it is lower in 21 regions. In the year 1990 and 2000, female AYS is lower than the AYS of Turkey in 21 regions.

	The change in years of schooling				The gap between male and female years of schooling		Changes in school years in 2000 compared to 1990	
	Male		Female		1990	2000	Male	Female
	1990	2000	1990	2000				
TÜRKİYE	5,56	6,76	3,46	4,59	2,10	2,17	1,20	1,13
Tekirdağ	5,57	6,63	4,13	5,10	1,44	1,53	1,06	0,97
İstanbul	6,92	7,55	5,20	5,98	1,72	1,57	0,63	0,78
Kocaeli	5,78	6,74	3,65	4,59	2,13	2,15	0,96	0,94
Bursa	5,97	7,01	4,15	5,11	1,82	1,90	1,04	0,96
Balıkesir	5,23	6,27	3,66	4,60	1,57	1,67	1,04	0,94
Manisa	5,26	6,04	3,42	3,99	1,84	2,05	0,78	0,57
İzmir	6,39	7,25	4,70	5,68	1,69	1,57	0,86	0,98
Aydın	5,5	6,48	3,66	4,76	1,84	1,72	0,98	1,10
Antalya	5,99	7,34	3,93	5,59	2,06	1,75	1,35	1,66
Adana	5,79	6,38	3,65	5,25	2,14	1,13	0,59	1,60
Hatay	5,15	6,42	2,59	3,84	2,56	2,58	1,27	1,25
Ankara	7,46	8,47	5,30	6,47	2,16	2,00	1,01	1,17
Konya	5,23	6,56	3,23	4,28	2,00	2,28	1,33	1,05
Kırıkkale	4,93	6,56	2,70	3,95	2,23	2,61	1,63	1,25
Kayseri	4,65	6,50	2,53	3,86	2,12	2,64	1,85	1,33
Zonguldak	5,41	6,30	3,12	3,94	2,29	2,36	0,89	0,82
Kastamonu	4,68	5,84	2,63	3,50	2,05	2,34	1,16	0,87
Samsun	4,84	5,97	2,76	3,74	2,08	2,23	1,13	0,98
Trabzon	5,36	6,48	2,60	3,72	2,76	2,76	1,12	1,12
Erzurum	4,98	6,63	2,45	3,57	2,53	3,06	1,65	1,12

Malatya	5,33	6,72	2,46	3,58	2,87	3,14	1,39	1,12
Gaziantep	4,72	5,92	2,01	3,09	2,71	2,83	1,20	1,08
Urfa	4,26	5,40	1,25	1,97	3,01	3,43	1,14	0,72
Ağrı	4,64	5,70	1,84	2,56	2,80	3,14	1,06	0,72
Van	3,28	5,55	1,02	1,96	2,26	3,59	2,27	0,94
Mardin	3,96	5,47	0,93	1,75	3,03	3,72	1,51	0,82

Source: AYS is calculated on data from Social and Economic Characteristics of Population by 1990 and 2000



According to international data, interesting results were obtained when AYS of males and females were compared. In the years 1990 and 2000, male and female AYS were below the mean average of the world. In Turkey AYS of males and females were lower than the world's AYS in 1990 and 2000. In 1990, AYS of males was above the world average in only Ankara. They were lower, however, in the other regions. In 2000, the AYS of males living in Ankara and İstanbul were above world average, whereas they were below the average in the other regions. AYS of males living in Ağrı, Mardin, Urfa and Van were approximate to the values of Sub-Saharan African (22) countries (Table 1; Barro & Lee, 2001). In Turkey, female AYS was lower than world average schooling years. In 1990 and 2000, AYS of females living in Gaziantep, Ağrı, Urfa, Van, and Mardin was lower than the AYS of those living in Sub Saharan African (22) countries (Table 1; Barro & Lee, 2001).

The highest gap between male and female AYS was seen in the regions: Mardin, Urfa, Malatya, Ağrı, and Trabzon; and the lowest gap was seen in Tekirdağ, Balıkesir, İzmir, İstanbul, and Bursa in 1990. The highest gap in male and female AYS was seen in the regions: Mardin, Van, Urfa, Malatya, and Ağrı; and the lowest gap was seen in Adana, Tekirdağ, İzmir, İstanbul, and Balıkesir in 2000 (Table 1; Figure 1).

When compared to 1990, in the year 2000 the gap between male and female AYS decreased in the regions of İstanbul, İzmir, Aydın, Antalya, Adana and Ankara, while it increased in the other regions. It

is striking that the highest increase in AYS happened in the regions of Kastamonu, Ağrı, Kırıkkale, Urfa, Kayseri, Erzurum, Mardin, and Van (Table 1; Figure 1). In 15 regions, the gap in male and female AYS was above the AYS of Turkey in 1990 and 2000.

Figure 1. The change in male and female AYS by regions in Turkey from 1990 to 2000

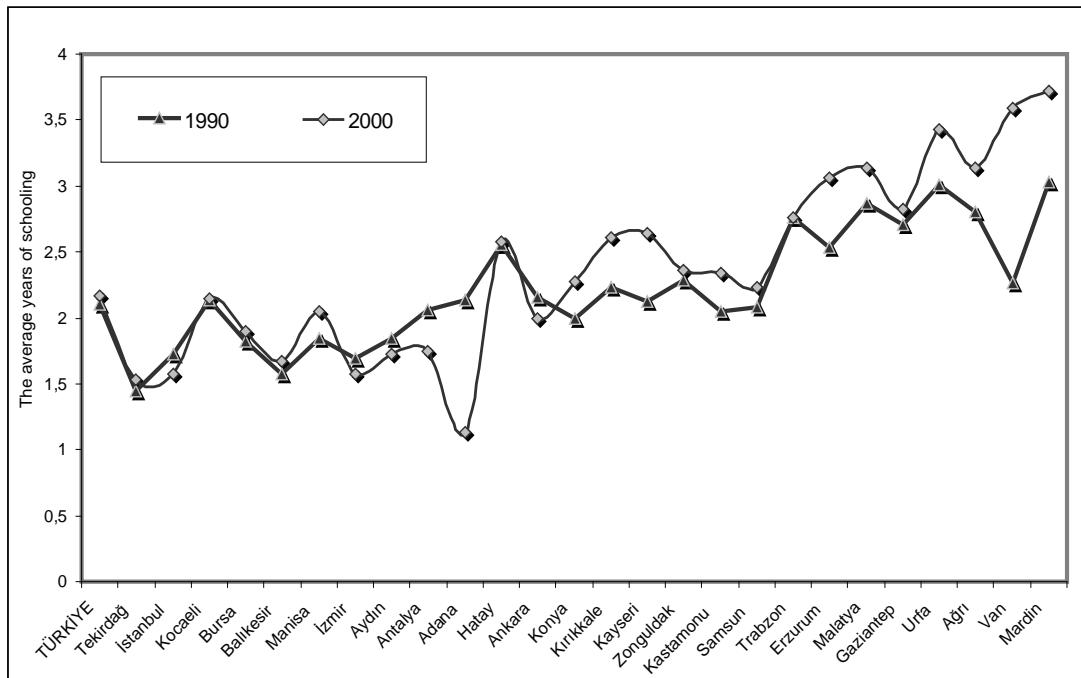


Figure 2. The gap between male and female AYS by regions in Turkey, from 1990 to 2000

The gap between male and female AYS is lower in the western part of Turkey, whereas higher in the eastern part. At the same time in these regions (regions in the eastern part) male and female AYS was low. A decrease in the gap between male and female AYS was seen in the regions where AYS was high, but at the same time there was a tendency of increase observed in the regions where AYS was low (Table 1; Figure 1; Figure 2; Barro & Lee, 2001). In general, the gap between male and female AYS was low in regions where AYS was high, and the gap was higher in regions where AYS was low (Table 1; Figure 1; Figure 2; Barro & Lee, 2001).

When the researcher observed the international data, it was seen that the gap between male and female AYS was lower in regions where AYS was high, whereas the gap was higher in regions where AYS was low. As from this point, the gap between male and female AYS was parallel with the world. According to the data of 1990 and 2000, AYS of males and females in Turkey are higher than the world data. When compared to the world numbers, the gap in Turkey between male and female AYS also was higher (Table, Figure 2, Barro and Lee, 2001).

In general, both male and female AYS increased in 2000 when compared to 1990. This increase in male AYS was the least in the regions of Adana, İstanbul, Manisa, İzmir, and Zonguldak; and, it was the most in the regions of Malatya, Mardin, Kırıkkale, Erzurum, Kayseri, and Van (Figure 3). Female AYS increased least in Manisa, Urfa, Ağrı, İstanbul, Zonguldak, and Mardin in 2000 when compared to 1990, and the most increase was seen in Ankara, Hatay, Kırıkkale, Kayseri, Adana, and Antalya.

The increase in male AYS in 10 regions was above that of the total country. The increase in female AYS in 6 regions was above the country numbers.

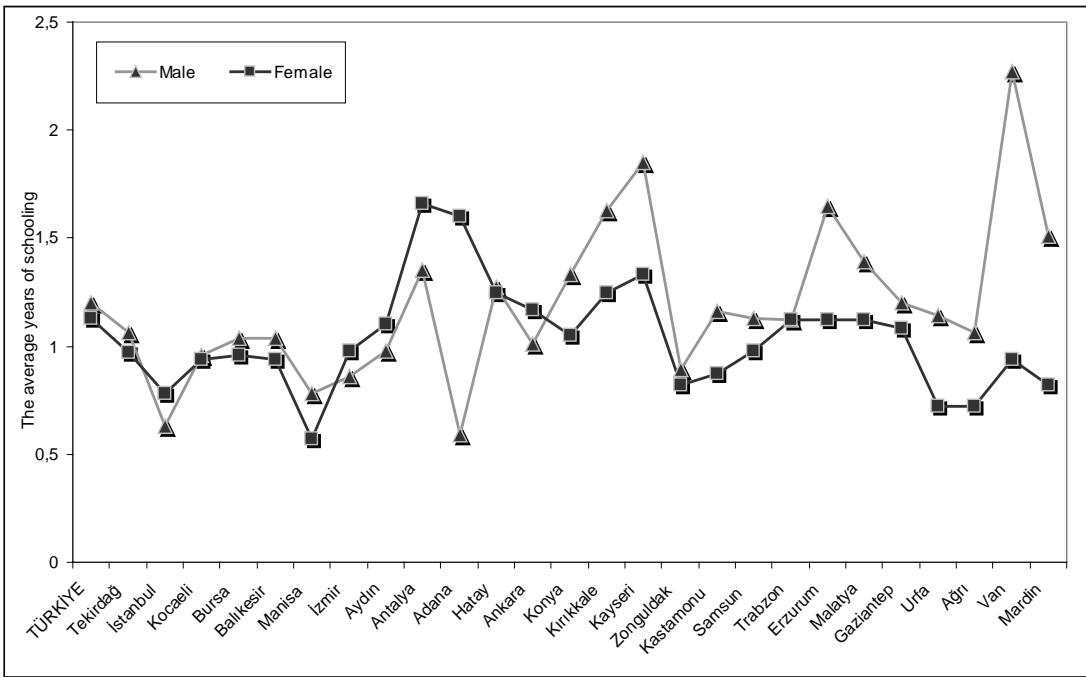


Figure 3. The increase in male and female AYS by regions in Turkey, in 2000 comparing to 1990.

In general there is an increase in the world AYS, but in regions of Turkey, where AYS are low, the increase was higher than world average. During the same period (1990-2000) in Turkey, increases in both male and female AYS were above the world average in all regions. Increases in the number of the regions with low AYS was above the mean average of Turkey and world. Male AYS increased more than those of females, however, in the regions with low AYS. Thus, Turkey differs from the general development in the world. In general, female AYS increased more than male, except from Sub Saharan African (22) countries (Barro & Lee, 2001).

It is seen from the data that the gap between male and female AYS gradually has decreased. Female AYS has increased more than male at the international level. Moreover, there was a back tracking in male AYS in those countries with transition economy. In Sub-Saharan African Countries, the gap between male and female AYS with low educational level was high and had a tendency to increase (Barro & Lee, 2001).

### CONCLUSION

In Turkey 1990–2000 was a decade when political, economic, and social crises existed consistently. During the period of these consistent crises, social phenomena were ignored in order to have more economic and political stability.

Ram (2001) stated that inequality increased in years of schooling by 7 years on average, and it had a tendency to decrease after more years of education. The outcomes in this study supported the findings reached by Ram (2001) to some extent. In this study, it was seen that the gap between years of schooling of males and females increased in regions and allocation units with low years of schooling in 2000, when compared to 1990; however, it fell down in the regions and allocation units with a higher number of years of schooling.

When the data of 1990 and 2000 were compared, male and female AYS in Western Turkey and the Mediterranean region were higher, and the gap between them was lower in 2000. On the other hand,

male and female AYS in the eastern and southeastern regions in Turkey were lower, and the gap between them was higher. In 1990 and 2000, in the regions in which both male and female AYS was low, the gap between their AYS was high.

In general, tendency of change in school years were similar in Turkey and the world in the year 2000, when compared to 1990. In this period, both male and female AYS in Turkey were below the world average, but the increase in AYS was higher than world average.

In the years 1990 and 2000, the regions of Erzurum, Malatya, Gaziantep, Urfa, Ağrı, Van, and Mardin in east and southeast Turkey, male and female AYS was low and the gap between them was higher. When it is considered in general, male and female AYS was low and the gap between them was high in the regions that take place in the eastern and southeastern Turkey. When this outcome is interpreted by considering AYS, however, it can be claimed that equality does not mean much, as long as the educational levels remain low.

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Dr. Glen I. Earthman, Secretary/Treasurer

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Blacksburg, VA 24060-8101

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