Teacher management: A selected bibliography

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List of abbreviations

ADEA	Association for the Development of Education in Africa
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome
IIEP	International Institute for Educational Planning
ILO	International Labour Organization
MUSTER	Multi-Site Teacher Education Research
MoEYS	Ministry of Education, Youth and Sport
OECD	Organisation for Economic Co-operation and Development
SIDA	Swedish International Development Co-operation Agency
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development

I. Introductory remarks

Over recent years, the management of teachers has attracted growing attention among national decision-makers and international agencies concerned with educational development. The present selection of bibliographical references, with abstracts for most of them, has been prepared by the IIEP-UNESCO in the framework of its project on "The management of teachers."

Focus and limitations

It is addressed to all those who place *teacher management at the crossroads of Human Resource Management (in the public sector) and the Management of Educational Development ,* similarly to the perspective adopted in the mentioned IIEP project, and who are interested in obtaining an overview of some relevant related bibliographical references.

Indeed, although 'rationalization' of public sector management and modern 'Human Resource Management' are henceforth high on the Agenda of educational decision-makers, one should not loose out of sight that at the end of the day teachers and teacher management have to contribute to the ultimate goals of educational development to which a society and its government have committed themselves.

In simplifying, one may conclude from existing studies and research work that Teacher Management currently has to meet three major challenges at the same time: it has to:

- provide enough teachers (to meet the demand);
- enable teachers to do 'good work' from both pupils' and teachers' point of view;
- respond to the major existing (especially financial) constraints.

The bibliographical references selected and presented hereafter relate to some of the related major issues and trends.

They are far from being comprehensive or 'representative' geographically or topic-wise. The references included were mainly selected according to their estimated relevance for providing an insight into the above-mentioned crucial challenges and issues in teacher management as they have been observed since the 1990s, particularly – but not exclusively – in developing countries.

Another major criterion of selection was their availability in English and accessibility via Internet. Whenever possible the link to the relevant website and the full version of the referenced document has been included.

The bibliography mainly presents studies and research reports which have been disseminated over recent years; it also refers to a number of articles and special issues of periodicals/newsletters which were found to be of particular relevance to the topic. Whenever easily accessible the abstract included in the referenced document itself has been reproduced in its full or an abbreviated form. The fact that certain documents are simply referenced without providing an abstract indicates by no means that they have been found to be less

relevant than the others but simply reflects the time and resource constraints set for the preparation of this bibliography.

Providing enough teachers under severe financial constraints

Austerity policies adopted in many countries since the 1990s have led to growing concerns among national decision-makers and international agencies about containing the salary expenditures in the public sector. Teacher salaries constitute a major part of governmental current expenditures and have come under particular scrutiny therefore.

Indeed, although their situation varies, many poor countries in the developing world find themselves in a particular dilemma: On the one hand they are facing drastic cuts in their public budgets. On the other hand they still have to expand very significantly the *supply of teachers* in order to achieve the UPE and EFA goals over the years to come. In quite a number of instances, the recruitment requirements will even be further increased by staff attrition due to factors such as HIV/AIDS, retirement, decreasing attractiveness of the teaching profession etc. The situation is different in most industrialized countries where the pace of expansion of the education sector has been slowing down, although a number of OECD countries also experience – or expect in the near future – problems of attracting enough qualified graduates towards the teaching profession.

Where the budgetary constraints are severe and teachers' remuneration level relatively high when compared to the rest of the population (in Africa the average teacher salary is 4.6 per capita GDP units compared to 3.7 units on average in the developing countries in general) governments cannot recruit civil servant teachers at the same pace as their systems are expanding. In many such cases, 'temporary' or local/'community' teachers – who are being paid at lower levels of remuneration and often also possess less professional training than tenured teachers – have been recruited to respond to the existing teacher demand.

Such strategies of *diversification of teacher remuneration levels, conditions and statuses* however also have a (mainly social, personal and political)'cost'; they tend to entail problematic consequences, in particular: disparities in teaching conditions, inequity in teacher treatment, dissatisfaction and lack of unity among the teaching staff; relatively high cost for the poorest families and therefore growing social inequity.

The 'rationalization' of *teacher distribution and utilization* has been another response to the challenge of 'providing enough teachers' under severe financial constraints. In many instances, indeed, teacher shortages noted at country level exist alongside with staff excess in certain schools or subject matters (in urban and privileged areas/schools in particular); moreover, parts of the teaching force are not fully 'used' due to the existing school structures and the rules and regulations governing teacher training and allocation..

The references included in *Chapter I*, *II* and *III* of this Bibliography discuss these trends and issues; *Chapter VI* presents references relating to some more specific issues – namely gender and HIV/AIDS – which can have a general impact on the mentioned challenges and their possible solutions, but require special treatment.

Enabling teachers to do 'good' work while containing cost

Available research and studies furthermore indicate that, apart from decent working conditions, teachers need to be motivated and provided with adequate training and professional support to be effective.

Where their pay (in real terms) has been shrinking to a critical level over the last years, teachers tend to show low motivation and presence on the job. However, in many instances there are obviously limits to the possibility of stepping up teacher salaries; moreover, job motivation depends on a variety of factors other than financial incentives.

Training and support are among such 'motivating factors'. At the same time they determine to a large extent teachers' professional knowledge and skills.

Recent studies have paid particular attention to two central questions: What kind of *pre-service professional training* – in terms of length, structure and content – is appropriate to ensure solid (lifelong) learning while containing reasonable costs for the system? And: What types of *in-service training* have proved effective and should be developed for teachers who have never had any professional training and are largely ineffective, on the one hand, and for those who were trained long ago and need an 'update' on the other.

A number of countries have taken interesting initiatives and some even have adopted integrated policies aimed at developing teacher competencies in an-effective way, particularly in using more school-based and/or distance modes of training.

However, even where some progress has been made in this area a major source of dissatisfaction for teachers, and also education managers, often continues to exist which lies in the actual *practices of teacher management*; indeed, the latter are, in many instances, accused of being affected by lack of transparency, centralization of power, favouritism and amateurism. Improvements in this will require some ingenious and sustained efforts to adjust, develop and enforce appropriate legal and organizational frameworks and procedures as well as effective tools, incentives and control mechanisms for teaching staff management.

Chapter IV and *V* of this Selected bibliography, as well as certain references under *Chapter VI*, relate to these crucial issues.

Links

Those interested in more information on the mentioned IIEP project on Teacher Management and the most recent other IIEP research activities relating to teachers may wish to refer to the IIEP web site:

http://www.unesco.org/iiep/
in particular : http://www.unesco.org/iiep/eng/research/comproj/management.htm
http://www.unesco.org/iiep/eng/research/basic/teachpols.htm
and http://www.unesco.org/iiep/eng/research/observ/ethcorr.htm (on ethics and corruption in education).

Moreover, the following other projects and research activities on teacher management and their related Web links were found to be particularly relevant to decision-makers and researchers interested in this area:

ADEA Working Group on the Teaching Profession : http://www.adeanet.org

ELDIS (Gateway to Development Information):
http://www.eldis.org/cf/search/index.cfm?keywords=teachers&resource

Multi-Site Teacher Education Research Project (MUSTER) Project/Centre for International Education at the University of Sussex Institute of Education:
http://www.sussex.ac.uk/usie/muster/

OECD project on Attracting, Developing and Retaining Effective Teachers:
http://www.oecd.org/document/9/0,2340,en_2649_201185_11969545_1_1_1_1,00.html

World Bank Institute Research (on Teacher Competencies, Good Governance etc)
http://web.worldbank.og/wbi

I. Status and conditions of teachers

IIEP publications and papers

Duthilleul, Y. 2004. International Perspectives on Contract Teachers and their Impact on Meeting Education for All. *The Cases of Cambodia, India and Nicaragua. Synthesis Report. Conference Primary School Contract Teachers. Bamako, Mali, 21-23 November 2004*. Unpublished manuscript. Paris: IIEP-UNESCO.

The purpose of this paper is to contribute to the debate currently taking place among West-African countries on the impact of contract teachers on the education system by providing them with experiences from other parts of the world. This paper summarizes a series of background papers and case studies from developed (United Kingdom and Sweden) and developing (Cambodia, India and Nicaragua) countries commissioned by the International Institute for Educational Planning (IIEP) and financed by a Norwegian Trust Fund managed by the World Bank.

The paper focuses on what was learned from Cambodia, India and Nicaragua regarding their experiences with contract teachers. These countries were selected because they have very unique and different experiences in the use of contract teachers although they share some of the same concerns and constraints in terms of improving access, quality and equity.

The document is available at:
http://www.unesco.org/iiep/eng/research/basic/PDF/teachers3.pdf

Geeves, R.; Bredenberg, K. 2005. *Contract Teachers in Cambodia.* Unpublished manuscript. Paris: IIEP-UNESCO.

Contract teachers were introduced as an emergency strategy to cope with the unanticipated shortages of teachers which resulted from uni-dimensional administrative and educational policies and the expansion of education into former conflict areas. Continuing to appoint Contract teachers also enabled the Ministry of Education, Youth and Sport to address chronic teacher shortages in many rural and remote areas. The Contract teachers who remain after the cuts of 2001-02 and 2002-03 are concentrated in former conflict and remote areas, primarily because these are the places in which the MoEYS has had most difficulty implementing its polices of re-deploying experienced teachers, or deploying neophyte teachers, to remote schools, despite offering a variety of incentives. The MoEYS aims to provide fully certified teachers to all primary schools in the country. Focusing on developing local teachers (including teachers on contracts – especially in ethnic minority schools) may prove a pragmatic complimentary strategy. In an under-resourced education system, local teachers already have the socio-economic support in place to remain in the area and they also facilitate community involvement in education.

The document is available at:
http://www.unesco.org/iiep/eng/research/basic/PDF/cambodia.pdf

Govinda, R.; Josephine, Y. 2004. *Para Teachers in India: A Review.* Unpublished manuscript. Paris: IIEP-UNESCO; New Delhi: National Institute of Educational Planning and Administration.

Engagement of teachers on contract basis as opposed to employment on permanent tenures particularly in government schools is a recent phenomenon. The number of such 'contract teachers' or 'para teachers' across the country possibly runs to more than 300,000 and is steadily increasing. Creating multiple layers of teachers with different salary structure and qualifications but doing exactly similar work is likely to lead to divisions and dissatisfaction on the one hand and make the profession vulnerable to arbitrary actions at local level by those who have no professional training or authority, on the other. Apart from this, many scholars have also joined the issue by questioning the wisdom of appointing para teachers on the ground that it is detrimental to quality in the long run. Where exactly does the reality lie? What is the rationale for employing para teachers? Are para teachers starkly under qualified that their involvement would affect the quality of education? How different are the service conditions of regular and para teachers? How do the para teachers themselves perceive the situation? What policy lessons do the current experience with para teachers suggest? These are some of the critical questions that are addressed in this review paper.

The document is available at:
http://www.unesco.org/iiep/eng/research/basic/PDF/teachers5.pdf

Additional detailed references

Armitage, K.; Powell, L. 1997. "A Re-examination of expatriate recruitment for education in developing countries". In: *International Journal of Lifelong Education, 16*(6), 504-517.

This article aims to identify and examine the key factors in effective recruitment for people to work successfully overseas. It investigates key factors such as experience of working overseas, attitude and personality which determine the success or failure of people recruited to work in education in developing countries; from personal reasons for seeking such work and the appropriate recruitment process, to the induction and how expatriates settle into their work and life in a very different culture and working environment. The 'culture shock' experienced on arrival is studied to reflect on how its effects may be lessened. Three case studies illuminate specific lessons that can be learned where there is evidence of match or mismatch between expatriate and employing organization.

For more information on this article, please visit:
http://www.tandf.co.uk/journals/

Coombe, C. 1997. "Unleashing the power of Africa's teachers". In: *International Journal of Educational Development, 17*(1), 113-117.

This paper sets out a range of issues – beyond those classics salary and housing – which impinge on teacher morale and performance in Africa. Taking a hard look at the conditions under which teachers serve, it suggests possible strategies for tackling fundamental difficulties in practical ways. The paper attempts to reflect the experience and collective wisdom of educators across Africa participating in the Commonwealth Secretariat/Association for the Development of Education in Africa teacher management and support programme.

European Commission, Directorate-General for Education and Culture; Eurydice, the information network on education in Europe, 2003. *The Teaching profession in Europe: profile, trends and concerns. Report III: Working conditions and pay. General lower secondary education*. Brussels: Eurydice.

This report is concerned with various aspects of the professional status of teachers, as well as their working conditions, working time, duties and pay. It also seeks to describe the position and content of in-service training and to examine formal arrangements for assisting teachers in difficulty.

Retrieved 4 October 2004 from:
http://www.eurydice.org/Doc_intermediaires/analysis/en/teachers_frameset_EN.html

The document is available at:
http://www.eurydice.org/Documents/KeyTopics3/en/FrameSet3.htm

Fwu, B.J.; Wang, H.H. 2002. "The Social Status of Teachers in Taiwan". In: *Comparative Education, 38*(2), 211-224.

The social status of teachers is one of the indicators reflecting the significance attached to education in each culture. This study found that teachers in Taiwan enjoy a relatively higher occupational prestige and an overall greater satisfaction with their jobs than their international counterparts. These outcomes may be attributed to the favorable policies in teacher education and schooling operations adopted by the Taiwanese government over past decades. The roots of these policies are in the cultural, historical and political development of the Taiwanese society. The Chinese cultural tradition, Japanese colonization and Nationalist rule have all played a role in forming the relatively high social status of teachers in Taiwan. However, as Taiwan has been undergoing major political and cultural transformations in recent years, the policies and public perceptions of teaching may change accordingly; therefore the social status of teachers in Taiwan remains to be closely observed.

Source: Fwu, B.J.; Wang, H.H. 2002. 'The Social Status of Teachers in Taiwan.' In: *Comparative Education*, *38*(2), p. 211.

For more information on this article, please visit:
http://www.tandf.co.uk/journals

Gokcekus, O.; Manning, N.; Mukherjee, R.; Nallari, R. 2001. *Institutional Environment and Public Officials' Performance in Guyana*. (World Bank technical paper N° 506). Washington, DC: World Bank.

This report presents the findings of a survey of 454 public officials in Guyana, whose views were sought in a wide range of civil service issues – from personnel management, to rewards, and disciplinary actions, and, from budget environment to corruption. Answers were used to test some prior assertions about the public sector in the country, and, it is the respondents' belief that public sector jobs are attractive, though public employees are not fully prepared for their jobs through education, and training, nor is recruitment always based on merit. However, officials find policies consistent, but implement policies even if in disagreement with policy directions. Furthermore, decision-making is characterized by poor communication, and low employee participation. Nonetheless, officials surveyed showed insight about which reforms might enhance organizational performance. Survey data demonstrated how widely varied the institutional environments of such organizations are, and,

provided evidence that performance does depend upon institutional environment. The report prioritizes interventions according to the potential payoffs in different performance areas, suggesting performance monitoring is likely to be associated with significant positive change in performance.

Retrieved 6 September 2004 from:
http://www-wds.worldbank.org/servlet/WDSContentServer/WDSP/IB/2001/06/29/000094946_01061904020332/Rendered/PDF/multi0page.pdf

The document is available at the same address.

International Labour Organization. 2000. *Lifelong learning in the twenty-first century: The Changing roles of educational personnel.* Report for discussion at the Joint Meeting on Lifelong Learning in the Twenty-first Century: The Changing Roles of Educational Personnel. Geneva: ILO.

This report has been prepared as the main background document for the Joint meeting on lifelong learning in the twenty-First century: The changing roles of educational personnel, held at the ILO in Geneva from 10-14 April 2000. Against a backdrop of lifelong learning systems which are largely still in their infancy, if they have recognizable shape at all, the report has looked at the changing roles and responsibilities of educational personnel, their remuneration and work organization in schools and training sites, means of greater participation in educational decision-making, the roles of employers and workers in promoting workplace learning, and their involvement, along with other stakeholders, in formulating general education and training policies.

Retrieved 9 September 2004 from:
http://www.ilo.org/public/english/dialogue/sector/techmeet/jmep2000/jmepr3.htm

The document is available at:
http://www.ilo.org/public/english/dialogue/sector/techmeet/jmep2000/jmepr1.htm

International Labour Organization. 1996. *Recent developments in the education sector.* Report for discussion at the Joint Meeting on the Impact of Structural Adjustment on Educational Personnel. Geneva: ILO.

This report prepared for an ILO education sector meeting held in 1996 is a comprehensive international review of employment and working conditions for managers, teachers and non-teaching personnel. Based on statistics and information over the period from 1985 to 1994, the report reviews trends in educational structure, financing and employment, career development of educational personnel, equality of opportunity and treatment for women and minorities, labour relations, remuneration and working conditions. More than 30 tables and figures provide important statistical and comparative data on education personnel from all regions of the globe.

Retrieved 9 September 2004 from:
http://www-ilo-mirror.cornell.edu/public/english/support/publ/xtextem.htm#new26

International Labour Organization. 1996. *Impact of Structural Adjustment on the Employment and Training of Teachers.* Report for discussion at the Joint Meeting on the Impact of Structural Adjustment on Educational Personnel. Geneva: ILO.

A major statistical and qualitative study of the impact on the teaching profession of the structural adjustment policies and programmes which heavily influenced government financing and policy decisions in the 1980s and early 1990s. The study reviews the concepts, nature and scope of structural adjustment policies and programmes, their impact on teacher pay, employment and working conditions, the role of teachers in educational reform decisions and structural adjustment and teacher training. A summary at the end sketches out an alternative vision of teachers' place in education from the dominant model prevailing at the height of financially-driven adjustment programmes.

Retrieved 10 September 2004 from:
http://www-ilo-mirror.cornell.edu/public/english/support/publ/xtextem.htm#new27

International Labour Organization, 1990. Teachers and international labour standards: a handbook. Geneva: ILO.

This publication offers a basic guide to international legal texts of relevance to the teaching profession, and is primarily intended for:

- teachers and their organizations;
- policy-makers, planners and administrators in education; and
- private educational employers.

It gives an extensive coverage of the provisions of the 1966 Recommendation concerning the Status of Teachers, as well as relevant Conventions and Recommendations adopted by the International Labour Conference.

International Labour Organization, 1991. Teachers in Developing Countries. A survey of employment conditions. Geneva: ILO.

The study, although not exhaustive, sheds light on the specific conditions under which teachers in developing countries practise their profession, and provides much useful information on careers, discipline, labour relations, working time, remuneration and the working environment. It also covers the particular problems of women teachers and private school teachers.

The book reflects the fundamental and varied role of teachers in national development and the growing difficulty for these countries, as a result of their limited resources, to meet the immense needs of a rapidly expanding school population.

Kloep, M.; Tarifa, F. 1994. "Working conditions, work style, and job satisfaction among Albanian teachers". In: International Review of Education/ Internationale Zeitschrift für Erziehungswissenschaft/Revue Internationale de l'éducation, *40*(2), 159-172.

For the first time in Albania, a large-scale study investigating teachers' working conditions was conducted. 349 teachers from many parts of the country and from all school levels answered an extensive questionnaire, providing a comprehensive description of their working situation. Self-reported job satisfaction and engagement in effective

classroom practices is relatively high among Albanian teachers, while the economic and physical conditions are bad. Step wise regression analyses reveal that the items measuring professional autonomy account for a considerable part of the variance of the job satisfaction measure; while work efficiency is mainly predicted by items measuring social support and, again, professional autonomy.

For more information on this article, please visit:
http://www.kluweronline.com/issn/0020-8566/contents

Morrison, M. 1999. "Temps in teaching: the role of private employment agencies in a changing labour market for teachers". In: *Journal of Education Policy, 14*(2), 167-184.

This paper explores the emergence of teacher employment agencies and the increased volume of employment agency business in teaching. It examines the role of agencies in quasi-educational markets, and the relationship between agency teaching and understandings about teachers' work. Drawing upon exploratory research conducted at the University of Warwick, the author analyzes documents and interviews with representatives from a range of agencies of differing size and complexity. Agencies are seen as part of a wider agenda that includes the marketization and privatization of schooling that begins to mirror what is already occurring within the Further Education sector. This includes emerging local markets for agencies and supply teachers, and agencies' relations with schools and unions are considered.

Organisation for Economic Co-operation and Development, 1997. *Promoting Performance and Professionalism in the Public Service.* (SIGMA Papers No. 21).

This is a report on human resources management practices in the public administrations of four central and eastern European countries: Albania, Estonia, Hungary and Poland.

The report's purpose is to determine to what extent the implementation of a specific law for employment in the administration would lead to significant changes in personnel management or in the preconditions for management, selection and promotion of staff. This report is therefore about public personnel management systems, management procedures and management practices and how they either support or hinder professionalism and appropriate conduct. To a certain extent it is also about the legislation and institutions as well as the training necessary to promote suitable civil service behaviour.

Retrieved 6 September 2004 from:
http://www.sigmaweb.org/pdf/SIGMA_SP21_97E.pdf

Organisation for Economic Co-operation and Development, 1996. Management Control in Modern Government Administration: Some Comparative Practices. Paris: OECD.

This publication is intended as a reference tool for officials in central and eastern European government administrations and supreme audit institutions who are concerned with building modern, cost-effective structures of controls. The individual chapters in this publication display the widely different approaches taken in OECD Member countries to implement management controls, and demonstrate the weaknesses and mistakes to which it is subject.

In other words, this publication focuses on the control mechanisms and procedures that need to be built into an organization's systems in order to provide reasonable assurance that top management's objectives will be met, rather than on the design and application of management information systems, which are generally well understood in Central and Eastern European countries. The studies included give examples of management controls in widely different areas of the public sector – such as road construction, overseas aid, and social welfare – and in countries with differing constitutional and cultural backgrounds, political and legislative structures, and public service traditions. They examine the importance of management controls to the manager and auditor and discuss the role played by different government institutions – including the finance or budget ministry, the supreme audit institutions, and other central institutions – in developing and implementing control systems.

Retrieved 7 September 2004 from:
http://appli1.oecd.org/olis/1996doc.nsf/LinkTo/OCDE-GD(96)16

The document is available at the same address.

Pandey, S. 2002. "Legislation and service condition of Indian primary school teachers". In: *Staff and Educational Development International, 6*(1), 61-73.

Teacher's motivation is the most important aspect in the qualitative improvement of education which in turn depends on factors related to their service conditions including their salary structure, working conditions and other facilities available to them. Almost all states in the country have acts to ensure security of service to the teachers working in aided or unaided recognized schools. This paper has comprehensively analyzed various legislative measures undertaken by the states *vis-à-vis* the change in the status and profile of primary teacher since independence. It is concluded that though these legislations have helped in improving the status and service conditions of teachers in aided and recognized schools, the teachers in private schools continue to suffer from different types of exploitations. The ever increasing number of litigation cases pending in various courts indicate towards the growing awareness among teachers about their rights on the one hand, and the need for modifications in existing legislation to accommodate needs of emerging educational scenario on the other.

Schiefelbein, E.; Braslavsky, C.; Gatti, B.A.; Farrés, P. 1994. "Characteristics of the teaching profession and the quality of education in Latin America". In: *Bulletin. The Major Project of Education in Latin America and the Caribbean*, 34, 3-17. Chile: UNESCO Regional Office for Education in Latin America and the Caribbean.

This article describes the characteristics of teacher performance in six Latin American countries. It contains a bird's eye view of current events, and emphasizes the low level of teacher satisfaction in terms of academic outcomes, wages, job security, and training opportunities. It does, however, stress their increased potential and interest in innovating and improving the quality of their educational strategies.

It is based on answers given by teachers of this region. The answers reveal concern with perfecting their formation and improving their teaching methods, while reflecting problems detected by specialists in the region's educational systems. The study also showed that half of all teachers embraced the profession because they were interested in teaching, however, initial vocation is seen almost exclusively in women since current salary levels entice very few men. In some cases initial vocation grows through time although in others the joy of teaching may diminish or be replaced by a different motivation. In any event, vocation

is an important element for staying in the profession, but the decision to leave hinges on other factors as well, such as experiencing success, the working environment, and salary levels.

Other references listed

(a) ILO/UNESCO recommendations and related documents

International Labour Organization/United Nations Educational, Scientific and Cultural Organization, 1966. Recommendation concerning the Status of Teachers, adopted by the special Intergovernmental Conference on the Status of Teachers, Paris, 5 October 1966, UNESCO.

Available at:
http://www.unesco.org/education/information/nfsunesco/pdf/TEACHE_E.PDF

The 1966 ILO/UNESCO Recommendation concerning the Status of Teachers : What it is ? Who should use it ?'

Available at:
http://unesdoc.unesco.org/images/0012/001260/126086e.pdf

ILO/UNESCO, 1997. Recommendation concerning the Status of Higher-Education Teaching Personnel adopted by the General Conference at its 29th session, Paris, 21 October – 12 November 1997.

Available at:
http://unesdoc.unesco.org/images/0011/001132/113234mb.pdf

Joint ILO/UNESCO Pacific Regional Seminar on the Status of Teachers, Nadi, Fiji, 28-30 September 1998. *Final Report*.

Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning the Status of Teaching Personnel. Seventh Session, Geneva, 11-15 September 2000. *Report.*

Available at:
http://www.ilo.org/public/english/dialogue/sector/techmeet/ceart00/ceartr.htm,

Joint ILO/UNESCO Committee of Experts on the Application of the Recommendation concerning the Status of Teachers. *Fourth Special Session*. *Report.* Paris, 15-18 September 1997.

Available at:
http://www.ilo.org/public/english/dialogue/sector/techmeet/ceart97/index.htm

Joint ILO/UNESCO Committee of Experts on the Application of the Recommendation concerning the Status of Teachers. March 1999. *Report on allegations received from teachers' organizations on non-observance of the Recommendation.*

Available at:
http://www.ilo.org/public/english/dialogue/sector/techmeet/ceart99/index.htm

(b) Miscellaneous

Dulyakasem, U. 1996. *The Status of Teachers in Some Southeast Asian and Pacific Countries: A Survey Report.* Bangkok: UNICEF, The UNICEF East Asia and Pacific Regional Office.

Wyman, W.; Allen, M. 2001. *Pay-for-Performance: Key Questions and Lessons from Five Current Models.* Education Commission of the States (EIS) Issues Paper.

Available at:
http://www.ecs.org/clearinghouse/28/30/2830.pdf

II. Teacher demand, supply and utilization

IIEP publications

Chapman, D.W. 1994. Reducing Teacher Absenteeism and Attrition: Causes, Consequences and Responses. Paris: IIEP-UNESCO.

High rates of absenteeism and turnover among teachers are widespread phenomena in many developing countries. Absenteeism and also, to a certain extent, attrition can indeed be seen as a waste of scarce resources and a threat to instructional quality and thus hamper efforts to utilize the teaching force available in the most efficient manner. Both are mainly a result of low teacher morale which, in turn, is due largely to lack of financial and other incentives, inappropriate recruitment and promotion policies and weak administrative support for teachers; yet, teacher absenteeism and teacher turnover are quite different matters requiring quite different solutions.

This monograph examines the scope and the causes of these problems as well as their possible solutions and eventually offers a framework that educational managers and planners as well as government decision-makers can use to evaluate possible policy responses within different specific contexts.

Göttelmann-Duret, G.; Hogan, J. (Eds). 1998 The Utilization, deployment and management of teachers in Botswana, Malawi, South Africa and Uganda: synthesis report of a sub-regional workshop and four country monographs. Paris: IIEP-UNESCO.

How to make sure that teachers are allocated to the schools where they are most needed, and where they can give their best? For many years, education policy-makers and managers in English-speaking sub-Saharan Africa have been facing this challenge. A certain number of policies, projects and initiatives have consequently been adopted with a view to improving the deployment, utilization and professional development of teachers, in particular through better management. However, complaints about the inefficient use and distribution of teachers persist.

A sub-regional workshop for high-level education decision-makers, planners and managers was held in South Africa in June 1996 with the aim of taking stock of current management of primary teacher deployment and exploring possible avenues for improvement. This book summarizes the presentations and discussions at the workshop as well as the main results of monographs prepared by participants on the utilization, deployment and management of primary teachers in Botswana, Malawi, South Africa and Uganda.

Konadu, D.A. 1994. Improving the deployment of teachers: the Ghanaian experience. Paris: IIEP-UNESCO.

Improving the staffing of schools all over the country and addressing in particular the lack of qualified teachers in the rural areas constitutes a central issue of teacher management in many developing countries. Over the last few decades, Ghana has taken significant steps towards meeting this challenge. The present monograph reports on the Ghanaian experience in analyzing in particular how the policies and administration of

teacher deployment have contributed to reducing temporary shortages and the 'urban-rural gap' in the provision of teachers.

Thompson, A.R. 1995. The Utilization and professional development of teachers: issues and strategies. Paris: IIEP-UNESCO.

Efficient teacher utilization constitutes one of the most crucial issues in teacher management. In order to avoid wasting scarce staffing resources and also with a view to contributing to the equality and efficiency of educational provision, policy-makers and managers are under increasing pressure to address a variety of crucial problems in this area. How can shortages of experienced and well-qualified staff be overcome and the best use be made of existing staff? How can the over-rapid turnover of teachers be reduced? What can be done to ensure a more even quality of education provision as between different geographical areas and the schools in the country? Furthermore, the search for ways of optimizing the use of the teaching force leads us to ask how the teachers' professional commitment, motivation and concern for self-improvement may be encouraged.

This monograph seeks to pinpoint the major problems of efficient teacher utilization, to examine critically the strategies which have been adopted in the developing world, and to assess their potential.

Williams, P. 1979. *Planning Teacher Demand and Supply.* Paris: IIEP-UNESCO.

Over the past two or three decades the demand for teachers has been at an unprecedented high level, and the educational authorities in each country have been hard put to it to staff their rapidly expanding education systems. In some countries enrolment growth is still accelerating, giving rise to ever greater teacher requirements; elsewhere however recent demographic and economic changes have brought about a leveling-off in the size of the teaching force needed, and a number of countries have been seriously embarrassed to find themselves unexpectedly in a situation of over-supply.

This study explores the factors determining the demand for teachers and teacher supply, and discusses the measures available to educational planners in their efforts to maintain and achieve balance. The author argues that creating capacity to respond to changed circumstances should be as much an objective of educational planners in this area as making accurate forecasts. He demonstrates that the managers of the teaching force, faced by incipient teacher shortage or surplus, have in fact a wide range of policy options open to them in the recruitment and deployment of teachers. While this is not an instructional manual on projecting teacher requirements, those whose responsibility this is will find useful advice in setting about their task.

ADEA publications

Condé, A.; Aliou Sow, M. 1995. *The redeployment of teachers in Guinea.* Paris: ADEA.

At the instigation of African Ministers, ADEA has undertaken the publication of reports describing successful African experiences in the field of education, thereby enabling African Ministers to tell their story of how they have dealt with a specific issue in the education sector.

This report describes how Guinea carried out the redeployment of its teaching staff between 1992 and 1993. As a result of this experience, significant efficiencies were developed that led to increased enrolments in both urban and rural schools without increased costs. Gross primary enrolments rates grew from 28% in 1990 to 40% in 1994.

A second edition was issued in 2002. It includes additional, updated information, and highlights issues involving management and communication. It also brings to light the results obtained since the teacher redeployment process was completed.

Halliday, I.G. 1998. *Setting staffing standards for schools.* Teachers' World Series. ADEA Working Group on the Teaching Profession. London: Commonwealth Secretariat.

An effective curriculum should not only provide a balanced educational diet. It should also be possible to convert it into an efficient timetable, which maximizes the use of available staff. This book shows how teacher demand, and consequently, appropriate staffing levels can be determined for secondary schools of different sizes. A short chapter is also included about staffing in primary schools.

Additional detailed references

Acedo, C. 1999. *Teachers supply and demand in the Philippines*. (Human Development Network for Education). Washington, DC: World Bank.

Teacher salaries in the Philippines have been substantially increased with the hope that this measure would make the profession more attractive and would contribute to improving the quality of teachers. However, it has been shown in the literature that a policy of higher salaries by itself without improving teacher education and establishing higher standards does not have an effect on improving teaching effectiveness. Apparently, better students have been enrolling in the Bachelor of Secondary Education (BSE) in the last years, but besides from that there has not been significant improvement in the quality of teachers in the Philippines after raising teacher salaries. One reason argued for the low quality of teachers, are the years of neglect of and lack of attention at what happens at the school level. But there are also serious reasons for the low performance of teachers, both on the supply side of teacher education and on the demand side of schools' teaching needs.

Retrieved 13 September 2004 from:
http://www1.worldbank.org/education/est/resources/case%20studies/philliipines%20-%20tea.doc

The document is available at the same address.

Beattie, N. 1996. "Interview and concours: teacher appointment procedures in England and Wales and France, and what they mean". In: *Assessment in Education: Principles, Policy and Practice, 3*(1), 9-28.

The paper compares and contrasts two methods or styles of selecting and appointing teachers. In England and Wales, teachers are invariably appointed by interview to particular posts in particular schools; in France, teachers are appointed to life-long Civil Service positions as a result of a competitive examination or concours. Each of these procedures reflects different assumptions about the education system in general and about the work of teachers in particular. These differences flow from the very different histories of the nation-states concerned. Recent changes, especially in the French system, are described and discussed. The author points to the tension between pressure from the European Union to integrate and harmonize national qualifications, and the deeply rooted character of distinct national cultures of schooling, teaching and learning and assessment.

Source: Beattie, N. 1996. 'Interview and concours: teacher appointment procedures in England and Wales and France, and what they mean.' In: *Assessment in Education: Principles, Policy and Practice, 3*(1), 9.

For more information on this article, please visit:
http://www.tandf.co.uk/journals

Crouch, L.; Lewin, K.M. 2000. Turbulence or Orderly Change? Teacher supply and demand in South Africa – current status, future needs and the impact of HIV/AIDS. (MUSTER Discussion Paper No. 26). Centre for International Education, University of Sussex, Institute of education.

This paper explores five aspects of the factors that are shaping the supply and demand for teachers in South Africa. First it charts the nature of the South African teacher force and changes that have taken place in its composition since 1995. Second, it profiles patterns of income amongst teachers and makes comparisons with the labour force as a whole. Third, an analysis is presented of the characteristics of teacher turnover. Fourth some forecasts of teacher demand are generated under a variety of assumptions. Fifth, attention is drawn to the implications that flow from the uneven incidence of HIV/AIDS on teacher supply and demand. The last section draws together conclusions from the various analyses that are relevant to future teacher education policy.

Retrieved 4 October 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/mpd_26_11_02.pdf

The document is available at the same address.

European Commission. Directorate-General for Education and Culture; Eurydice, information network on education in Europe, 2002. *Key topics in education in Europe, Volume 3. The Teaching profession in Europe: profile, trends and concerns. Report II: Supply and demand. General lower secondary education.* Brussels: Eurydice.

This report gives projections of demographic trends that may affect the balance between teacher supply and demand. It also describes the planning policies that have been adopted by some countries and presents available national statistical data with a view to quantifying shortage and over-supply. An analysis of recruitment methods is related to the shortage or over-supply of teachers encountered in some countries, while a chapter is devoted to the measures taken so that teachers can be replaced on a temporary basis. The types of emergency measures which are authorized in situations of shortage are also the subject of an in-depth analysis. Lastly, the report presents organized campaigns and specific initiatives which are used to attract fully qualified new recruits to the profession.

Retrieved 17 September 2004 from:
http://www.eurydice.org/Doc_intermediaires/analysis/en/teachers_frameset_EN.html

The document is available at:
http://www.eurydice.org/Documents/KeyTopics3/en/FrameSet2.htm

Hedges, J. 2000. *The importance of posting in becoming a teacher in Ghana.* (MUSTER Discussion Paper No. 13). Centre for International Education, University of Sussex, Institute of Education.

This paper is based on research done in the Central Region of Ghana and addresses some of the issues surrounding the posting of newly trained teachers. The research draws upon documents; interviews with members of the education bureaucracy; and interviews with 23 newly trained teachers posted largely to basic schools in rural areas. The paper illuminates the problems in posting newly trained teachers to rural schools. Furthermore it suggests that the education system is, in some ways, exacerbating these problems and that the education bureaucracy has a major influence on newly trained teachers' perspectives on the profession. This paper also includes an exploration of some positive aspects of the issue, such as some of the reasons why teachers accept difficult postings, and ways in which some parts of the education system are responding to the crisis.

Retrieved 4 October 2004 from:
http://www.sussex.ac.uk/usie/muster/reports/MDP%2013-1102.doc

The full text is available at the same address.

Jishnu, D; Dercon, S.; Habyarimana, J.; Krishnan P. 2005. *Teacher Shocks and Student Learning: Evidence from Zambia*. Policy Research Working Papers: World Bank.

The objective of the study is to estimate the impact of shocks to teachers on student learning in Mathematics and English. Using absenteeism in the 30 days preceding the survey as a measure of these shocks, large impacts were found: A 5-per cent increase in the teacher's absence rate reduces learning by 4 to 8 per cent of average gains over the year. This reduction in learning achievement likely reflects both the direct effect of increased absenteeism and the indirect effects of less lesson preparation and lower teaching quality when in class. The authors document that health problems – primarily teachers' own illness and the illnesses of their family members – account for more than 60 per cent of teacher absences; not surprising in a country struggling with an HIV/AIDS epidemic. The relationship between shocks to teachers and student learning suggests that households are unable to substitute adequately for teaching inputs. Excess teaching capacity that allows for the greater use of substitute teachers could lead to larger gains in student learning.

Retrieved 8 August 2005 from:
http://wdsbeta.worldbank.org/external/default/WDSContentServer/IW3P/IB/2005/05/12/000011823_20050512103756/Rendered/PDF/wps3602.pdf

The document is available at the same address.

Ingersoll, R.M. 2001. *Teacher Turnover, Teacher Shortages, and the Organization of Schools.* Center for the study of teaching and Policy: University of Washington.

Contemporary educational theory holds that one of the pivotal causes of inadequate school performance is the inability of schools to adequately staff classrooms with qualified teachers. Contemporary theory also holds that these staffing problems are primarily due to shortages of teachers, which, in turn, are primarily due to recent increases in teacher retirements and student enrolments. Based on survey data from the USA, this analysis

investigates the possibility that there are other factors that might have an impact on teacher turnover levels, and, in turn, the staffing problems of schools, factors rooted in the organizational characteristics and conditions of schools. The data show that the amount of turnover accounted for by retirement is relatively minor, especially when compared to that resulting from two related causes – teacher job dissatisfaction and teachers pursuing other jobs. The study demonstrates that, in particular, low salaries, inadequate support from the school administration, student discipline problems, and limited faculty input into school decision-making all contribute to higher rates of turnover, after controlling for the characteristics of both teachers and schools. Rather, they suggest that school staffing problems are primarily due to excess demand resulting from a "revolving door" – where large numbers of teachers depart their jobs for reasons other than retirement. This study also suggests that popular education initiatives, such as teacher recruitment programs, will not solve the staffing problems of such schools if they do not also address the organizational sources of low teacher retention.

Retrieved 20 September 2004 from:
http://depts.washington.edu/ctpmail/Abstract-TTT.html

The document is available at:
http://depts.washington.edu/ctpmail/PDFs/Turnover-Ing-01-2001.pdf

Ingersoll, R.M. 2002. *Out-of-Field* Teaching, Educational *Inequality*, and the Organization of Schools: An Exploratory Analysis. A Research Report. Center for the Study of Teaching and Policy: University of Washington.

This study focuses on a little recognized source of under qualified teaching – the problem of out-of-field teaching – teachers being assigned by school administrators to teach subjects that do not match their training or education. The author uses data from the Schools and Staffing Survey in the United States. The results show that while most teachers, even in disadvantaged schools, hold basic qualifications, a significant proportion of these qualified teachers, especially in disadvantaged schools, are assigned to teach classes out of their fields. Data also show that out-of-field teaching is not primarily due to school hiring difficulties resulting from teacher shortages. In contrast, the analysis shows that a number of aspects of the administration and organization of schools are significantly related to out-of-field teaching. For example, school district regulations concerning minimal education requirements for new hires, the quality of principal leadership, the strategies schools use to cope with teacher recruitment and hiring, and average school class sizes all have an independent association with the extent of out-of-field teaching in schools, after controlling for other factors.

Retrieved 20 September 2004 from:
http://depts.washington.edu/ctpmail/Abstract-OFT.html

The document is available at:
http://depts.washington.edu/ctpmail/PDFs/OutOfField-RI-01-2002.pdf

Macdonald, D. 1999. "Teacher attrition: a review of the literature". In: *Teaching and Teacher Education, 15*(8), 835-848.

Teacher attrition is generally positioned within research addressing teacher shortage, the wastage of resources and expertise, as well as that concerning teachers' lowly status and

poor working conditions. As such the research is fragmented and diverse. This paper attempts to draw together contemporary international attrition research in order to consider: how teacher attrition may be defined; patterns of attrition; influences upon attrition; the impact of attrition; and strategies employed for decreasing attrition. It concludes that research concerning teacher attrition requires the development of more comprehensive databases on teaching personnel and increased clarity of how attrition is being framed and investigated.

"Reprinted from *Teaching and Teacher Education*, *15*(8), Macdonald, D., ''Teacher attrition: a review of the literature'', p. 835-848, 1999, with permission from Elsevier".

The article is available at:
http://www.sciencedirect.com/science?_ob=MImg&_imagekey=B6VD8-3XT0C0H-1-1&_cdi=5976&_orig=browse&_coverDate=11%2F30%2F1999&_sk=999849991&view=c&wchp=dGLbVzz-zSkzV&_acct=C000054093&_version=1&_userid=1922471&md5=e83d8927e5ee81e87474aa3034bc2b50&ie=f.pdf

McEwan, P.J. 1999. "Recruitment of Rural Teachers in Developing Countries: An Economic Analysis." In: *Teaching and Teacher Education, 15*(8), 849-859.

Monetary and non-monetary incentives for rural teacher recruitment are a prominent feature of developing-country education systems. Despite the widespread use of incentives, there is little theoretical or empirical evidence on their effectiveness. This paper interprets incentive policies within the framework of the economic theory of compensating differentials. The discussion clarifies the implicit assumptions of incentive policies and aids in organizing further empirical work on their effectiveness. Existing evidence on compensating differentials, mainly in the United States, shows that teachers tend to trade off monetary wages against non-monetary aspects of their jobs, such as geographic location and class size.

"Reprinted from *Teaching and Teacher Education*, *15*(8), McEwan, P.J., ''Recruitment of Rural Teachers in Developing Countries: An Economic Analysis'', 849-859, 1999, with permission from Elsevier".

The article is available at:
http://www.wellesley.edu/Economics/mcewan/Papers/recruitment.pdf

Mehrotra, S.; Buckland, P. 1998. *Managing Teacher Costs for Access and Quality.* (UNICEF Staff Working Papers. Evaluation, Policy and Planning Series, Number EPP-EVL-98-004). New York: UNICEF.

This paper starts from an analysis of teacher remuneration levels across countries to identify the important trends which could influence access and quality. It then goes on to discuss a range of cost-effective strategies which have been employed by the state in developing countries to increase teacher numbers, improve teacher training and support, improve teacher performance and motivation, promote more equitable distribution of teachers and address gender inequities. The paper then examines a range of community responses to teacher shortage, and identifies some of the critical factors which influence their effectiveness. It concludes with an analysis of the main lessons learned to inform the development of individual country strategies to manage teacher costs to improve access and quality.

Retrieved 1 October 2004 from:
http://www.unicef.org/girlseducation/teachfin.pdf

The document is available at the same address.

Nilsson, P. 2003. *Education for All: teacher demand and supply in Africa.* (Education International Working Papers No. 12). Brussels: Education International.

Achievement of the Education for All (EFA) goal of universal primary education by 2015

Nilsson, P. 2003. *Education for All: Teacher Demand and Supply in South Asia.* (Education International Working Paper No. 13). Education International.

This working paper examines the place of teachers in the primary education systems of Bangladesh, India, the Maldives, Nepal, Pakistan and Sri Lanka. The paper notes that teachers are essential to the achievement of quality education, and thus to the achievement of the EFA goals, but the country reports on which it is based show that the quality of education suffers from the following problems:

- severe shortages of teachers in many of the countries of South Asia;
- many teachers are unqualified;
- HIV/AIDS is having a serious impact on the numbers of teachers in a number of countries;
- rapid population growth is increasing the demand for teachers;
- quality of education is affected by very high student to teacher ratios in Bangladesh and Nepal;
- there is a great need to improve the level of teacher pre-service and in-service training and development, but resources to achieve this are scarce;
- teachers' working conditions and status, including pay, number of teaching hours, and class sizes, need to be improved to attract and retain teachers;
- budget expenditures on education are sometimes less than would be expected from the country reports' rhetorical commitment to improving education.

In addition, there is a need to increase the participation of girls; this requires the training and employment of more female teachers, and gender sensitization for both male and female teachers

Retrieved 8 September 2004 from:
http://www.campaignforeducation.org/resources/Nov2003/EI_TeachersAsia

The document is available at:
http://www.campaignforeducation.org/resources/Nov2003/EI_TeachersAsia1103.pdf

OECD, 2005. Teachers Matter: Attracting, Developing and Retaining Effective Teachers. Paris: OECD.

Teachers Matter provides a comprehensive, international analysis of trends and developments in the teacher workforce in 25 countries around the world; research on attracting, developing and retaining effective teachers; innovative and successful policies and

practices that countries have implemented; and teacher policy options for countries to consider.

While documenting many areas of concern about teachers and teaching, the report also provides positive examples of where policies are making a difference. It spotlights countries where teachers' social standing is high, and where there are more qualified applicants than vacant posts. Even in countries where shortages have been a concern, there are recent signs of increased interest in teaching, and policy initiatives appear to be taking effect.

At a time when many countries are facing an ageing teaching workforce and having trouble attracting new recruits, this book provides insights into how governments can successfully deal with these issues.

Retrieved 6 September 2005 from:
http://www.oecdbookshop.org/oecd/display.asp?sf1=identifiers&st1=5LGTVPVRN5TD

A read-only version of the document is available at :
http://213.253.134.29/oecd/pdfs/browseit/9105041E.PDF

Pitiyanuwat, S.; Wiratchai, N. 2001. "Effectiveness Indicators of Teacher Utilization". In: Cheng, Y.C.; Mok, M.M.C.; Tsui, K.T. 2001. Teaching Effectiveness and Teacher Development: Towards a New Knowledge Base. Hong Kong: Hong Kong Institute of Education; Dordrecht (Netherlands): Kluwer Academic Publishers.

Teacher utilization at the system level is one of the key concerns in education reform particularly related to the issues of teacher development and effectiveness beyond the individual level. Teachers are often scarce and expensive resources in some developing countries; effective and efficient utilization of teachers inevitably becomes a necessity in policy-making. Responding to this need, the authors establish a new structural equation model to analyze factors contributing to teacher utilization effectiveness in Thailand. In the model, the indicators of both process and output factors pertaining to the personnel, the school, and the community aspects of teacher utilization effectiveness have been included. Some implications can be drawn for policy formulation on teacher development and school improvement.

Santiago, P. 2002. Teacher Demand and Supply: Improving Teaching Quality and Addressing Teacher Shortages: A Literature Review and a Conceptual Framework for Future Work. (OECD Education Working Paper No. 1). Paris: OECD.

This paper provides an extensive review of the most relevant issues involved in the management of teacher demand and supply at the pre-tertiary level. First, it proposes a conceptual framework for distinguishing among, defining and relating the different relevant factors. Second, it identifies trends and policy concerns regarding the quality of the teaching workforce across the OECD area. Third, it provides an account of current empirical evidence on numerous aspects (e.g. class size, reward structure, working conditions, teacher education, certification procedures, organization of schools, evaluation systems, structure of labour market, teaching and learning practices) impacting on the teaching profession. Some concerns about maintaining an adequate supply of good quality teachers emerge. It is the case that in a great number of countries the age profile of teachers is skewed towards the older end of the age-range and signs point to a recent worsening of the situation. In addition, the relative attractiveness of the profession, as far as the salary dimension is concerned, has declined

substantially in the most recent years. Other evidence indicates that, at least in some countries, a substantial share of the teaching workforce does not hold a regular teaching license and the proportion of 'out-of-field' teaching assignments is strikingly high in many subject key areas. It is also emphasized that a teacher shortage is difficult to measure and raises quality as well as quantity concerns. Given that teacher quality is a critical factor in determining student learning, it is entirely appropriate that the educational authorities in the countries with the greatest difficulties develop strategies to guarantee a sufficient supply of quality teachers. This report identifies a broad set of policies that should be given serious consideration to achieve that objective. Finally, this paper also sheds light on the current availability of data on teachers at OECD and relevant data needs for a future quantitative analysis.

Retrieved 12 November 2004 from:
http://www.olis.oecd.org/OLIS/2002DOC.NSF/43bb6130e5e86e5fc12569fa005d004c/fc5d38a873bf5867c1256c95003a0adf/$FILE/JT00137104.PDF

The document is available at the same address.

Siniscalco, M.T. 2002. *A statistical profile of the teaching profession.* Geneva: ILO; Paris: UNESCO.

This report synthesizes ILO and UNESCO data on teachers and teacher/pupil ratios worldwide. It provides data on numbers of teachers in primary and secondary schooling, their qualifications and numbers of school age children both in and out of school. Data is compared with that from OECD countries.

Key findings are:

- demand for teachers is highest in developing countries;
- primary-school teacher numbers have increased but have not kept pace with population growth so that pupil/teacher ratios have grown;
- out-of-school populations of secondary school age children are high, indicating that there are not enough teachers for this age group;
- demographically, the least developed countries tend to have the youngest and least experienced teachers ;
- least developed country teachers tend to have less pre-service education;
- wide variations in working hours and class sizes were noted;
- salaries are variable according to government policy and GDP.

The report identifies a number of data gaps and outlines OECD and other organizations' initiatives to improve data collection in these areas.

Retrieved 7 October 2004 from:
http://www.eldis.org/static/DOC10706.htm

The document is available at:
http://www.ilo.org/public/english/dialogue/sector/papers/education/stat_profile02.pdf

Van Amelsvoort, G.; Hendricks M.A.; Scheerens, J. 2000. "Selection and Development of International Indicators on Staffing". In: *Education Economics, 8*(1), 17-36.

International comparisons of indicators on staffing are regarded as a useful information base to policy-makers. Politically relevant staffing indicators in relation to the costs, planning and quality of education deal with training, working conditions, staff characteristics, and stability and mobility of the teaching force. In order to obtain reliable and comparable information from the indicators, a long conceptual process of selection, defining and developing is needed. By way of illustration the current state of the development process of staffing indicators on tertiary education are described. Three rationales for selection distinguished are a) macro-level descriptions, b) system level conditions that affect teachers' motivation, and c) the effectiveness and efficiency perspective. Next, the results of some 'ready to use' indicators for primary and secondary education are presented.

For more information on this article, please visit:
http://www.tandf.co.uk/journals

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Brandt, W.; Rymenans, R.; van Petegem, P. 2000. *Recruitment of educational personnel.* Geneva: ILO.

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http://www.ilo.org/public/english/dialogue/sector/papers/education/educpers.pdf

Ingersoll, R.M. (2003). *Out-of-Field Teaching and the Limits of Teacher Policy. A research report*. Center for the Study of Teaching and Policy: University of Washington.

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http://depts.washington.edu/ctpmail/PDFs/LimitsPolicy-RI-09-2003.pdf

Levin, J.; Quinn, M. 2003. Missed Opportunities: How We Keep High-Quality Teachers out of Urban Classrooms. The New Teacher Project.

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Murnane, R.J.; Singer, J.D.; Willett, J.B.; Kemple, J.J. ;Olsen, R.J. 1991. *Who will Teach: Policies That Matter.* Cambridge: Harvard University Press.

OECD. 2002. "The teaching workforce: concerns and policy challenges". In: *Education policy analysis*, Chapter 3 (pp. 65-87). Paris: OECD.

Available at:
http://www.oecd.org/dataoecd/0/32/2379025.pdf

OECD. 2004. The quality of the teaching force. (Policy Brief). Paris: OECD.

Available at : http://www.oecd.org/dataoecd/17/9/29478720.pdf

III. Teacher pay, incentives and motivation

IIEP publication and paper

Anderson, L.W. 1991. *Increasing Teacher Effectiveness*. Paris: IIEP-UNESCO.

There are several ways in which the quality of an education system can be improved. Whatever is done in terms of distributing new material or developing new curriculum, however, the quality of an education that students receive will always be highly dependent on the quality of instruction that teachers provide. In other words educational effectiveness depends first and foremost on teachers effectiveness. This booklet addresses the important issue of how teachers and the schools in which they work can be made increasingly effective. It summarizes a wealth of research results available on the subject in developed, but also developing countries. It also provides instruments for researchers, or those responsible for the planning of teaching in one country, who would like to study what really happens in the classrooms in which students receive their instruction.

A second edition was issued in 2004.

Strath, A. 2004. *Teacher Policy Reforms in Sweden: The Case of Individualized Pay.* Unpublished manuscript. Paris: IIEP-UNESCO; The Swedish Ministry of Education and Science.

The reason for introducing a decentralized and individualized pay system in the Swedish public sector was to give the employers responsibility for pay setting in order to stimulate improvement in effectiveness, productivity and quality at the workplace. An important part of this reform was to improve the recruitment and retention of teachers and to link pay to performance.

The new system has now been in place for eight years with two consecutive collective agreements. An important question is then to what extent the intended outcomes have been accomplished and whether it is possible to discern any impact on quality, efficiency and equality, issues normally of concern for policy makers. It is interesting to note that over the course of time there has been a major shift in view points from teachers' perspectives from a very negative attitude towards a majority of teachers in favour of individualized pay. There is still some way to go before it is possible to reap the full benefit of this reform. However, this paper attempts to answer the central issues raised above by providing an overview of the individualized teacher pay system, how it functions, conditions necessary for its implementation and major obstacles still remaining.

The document is available at:
http://www.unesco.org/iiep/eng/research/basic/PDF/teachers2.pdf

ADEA publication

Makau, B.; Coombe, C. 1994. *Teacher Morale and Motivation in Sub-Saharan Africa: Making Practical Improvements.* Working Group on the Teaching Profession. London: Donors to African Education.

Improved teacher commitment is dependent on well-planned and coordinated actions to improve the professional and pecuniary incentives offered to teachers including:

- conditions of service appropriate to this professional cadre;
- professional and rational career development;
- substantial teacher participation in educational management and decision-making at national, local and schools level;
- teacher involvement in developing as well as implementing curricula;
- an enhanced professional and administrative ambiance in schools.

Suggestions have been made as to how, at national, local and school levels policies and procedures for change can be developed and implemented in order to reinstate teachers at the core of quality education.

Additional detailed references

Abdo, Huda, A. 2001. "Teacher incentives in the Middle East and North Africa Region: the shortcomings". In: *Mediterranean Journal of Educational Studies, 6*(1), 107-122.

Based on Kemmerer's work on teacher incentives, this study examines the availability of incentives for teachers in the Middle East and North Africa region. The research results reported in this article indicate that school facilities and classrooms are in poor conditions in some of the surveyed countries, and particularly so in rural areas; classes were also found to be crowded. In addition, evaluation or supervision of instruction is almost non-existent, while in-service training was found to be ineffective. In the light of this assessment, implications are drawn to considerably reduce class sizes as well as implement instructional supervision or assessment and increase school equipment and supplies. Additional avenues for improving teacher incentives are considered and several recommendations for change are made.

Ballou, D.; Podgursky, M. 1997. *Teacher pay and teacher quality***.** Kalamazoo (Michigan): W.E. Upjohn Institute for Employment Research.

Ballou and Podgursky offer an economic analysis on issues surrounding the debate over whether increasing salaries for teachers leads to a more qualified teaching workforce. The authors find little evidence to support the link between increased salaries and teacher quality, then address two questions: (1) What went wrong? and (2) Which reforms are likely to meet with increased success?

To answer these questions, the authors review data on the characteristics of newly recruited teachers. They also show how key structural features of the labour market for teachers systematically undermine efforts to improve teacher quality. Finally, the authors undertake a comparison of personnel policies and staffing patterns in public and private schools, and comment on the impact of regulatory constraints currently imposed on public school administrators.

Bennell, P. 2004. *Teacher motivation and incentives in sub-Saharan Africa and Asia*. Unpublished document. London: Department for International Development.

This paper focuses on teacher motivation and incentives in low-income developing countries in sub-Saharan Africa and Asia. In particular, it assesses the extent to which the material and psychological needs of teachers are being met. This includes overall levels of occupational status, job satisfaction, pay and benefits, recruitment and deployment, attrition, and absenteeism.

Retrieved 23 December 2004 from:
http://www.eldis.org/cf/search/disp/docdisplay.cfm?doc=DOC15160&resource=f1

The document is available at:
http://www.eldis.org/fulltext/dfidtea.pdf

Delannoy,F.; Sedlacek, G. 2000. *BRAZIL: Teachers Development and Incentives: A Strategic Framework.* (Report No. 20408-BR). Human Development Department, Brazil Country Management Unit, Latin America and the Caribbean Regional Office. Document of the World Bank.

The study takes a first, selective look at the complex set of issues surrounding the effectiveness of Brazil's 1.6 million teachers in this context of rapid educational change. Its objectives are to offer an external perspective on the national vision, to contribute new data and analysis to inform it, including a synthesis of relevant lessons from national and international experience, and to offer options for future policies. It suggests a strategic framework for linking discrete elements of the vision – teacher development, management and incentives – into a coherent whole, consistent with the experience of countries across the world which have achieved system-wide improvement.

Retrieved 8 October 2004 from:

http://www1.worldbank.org/education/est/resources/case%20studies/brazil-%20tea%20-%20full.doc

The document is available at the same address.

European Commission. Directorate-General for Education and Culture; Eurydice, information network on education in Europe, 2004. *Key topics in education in Europe, Volume 3. The Teaching profession in Europe: profile, trends and concerns. Report IV: Keeping teaching attractive for the 21st century. General lower secondary education.* Brussels: Eurydice.

After examining in the first three reports the situation of teachers as regards their initial training and transition to working life (Report I) supply and demand (Report II) and their working conditions and pay (Report III), Eurydice in this final report looks more closely at how the teaching profession is perceived by teachers and society in various surveys of opinion and offers the following five areas for further consideration if the attractiveness of the profession is to be enhanced: diversification of paths through training; greater overall consistency in initial and in-service training; the part played by financial incentives in salary policies; the promotion of mobility as a means of securing a balanced supply of teachers on the employment market; and factors likely to motivate teachers nearing retirement to remain in the profession.

Retrieved 7 October 2004 from:
http://www.eurydice.org/Doc_intermediaires/analysis/en/teachers_frameset_EN.html

The document is available at:
http://www.eurydice.org/Documents/KeyTopics3/en/FrameSet4.htm

Farrell, J.P. and Oliveira, J.B. (Eds.). 1993. *Teachers in developing countries: improving effectiveness and managing costs.* Series of the World Bank. Washington, DC: World Bank.

This volume discusses the major options decision makers face when dealing with teacher career and remuneration policies. Most of the papers were prepared for a seminar on teacher costs and effectiveness organized by the Economic Development Institute (EDI) of the World Bank. Like the seminar, the book attempts to raise common issues and examine the most critical policy choices related to improving the performance of education systems. Some issues are unique to developing countries, as the authors point out. Many problems, however, are shared equally by the industrial countries, so a few papers analyzing the situation in the industrial countries are also included. The book deals with a central question: how can remuneration and managerial policies help improve teacher effectiveness? Three major lessons emerge from the experience of wealthier countries that seem to be valid for the developing world as well: 1) to retain a good teaching force, countries must make sizable investments; 2) in most countries teacher shortages are directly related to decreasing salaries; and 3) motivating the teaching force and providing monetary and non-monetary incentives for teachers to improve their performance is a matter of concern regardless of a country's level of development.

Retrieved 8 November 2004 from:
http://www-wds.worldbank.org/servlet/WDS_IBank_Servlet?pcont=details&eid=000178830_9810191119349

The document is available at:
http://www-wds.worldbank.org/servlet/WDSContentServer/WDSP/IB/1999/10/13/000178830_98101911119349/Rendered/PDF/multi_page.pdf

Fry, L. 2002. What makes teachers tick? A policy research report on teachers' motivation in developing countries. London: Voluntary Service Overseas.

How can teacher morale be improved in developing countries? VSO reports here on a study that explored teachers' perspectives on factors affecting their motivation and changes in policy and practice necessary to increase it. On the assumption that teacher motivation is an important factor in education quality, teachers in Malawi, Zambia and Papua New Guinea were asked about factors such as pay support needs and relationships with wider society and how these affect motivation.

The main findings of the work are:

- morale and self-confidence is low;
- motivation does affect educational quality;
- policy-makers tend to ignore morale and motivation.

Recommendations to address these issues include:

- policy-makers should address motivation by establishing fora in which teachers can discuss and address concerns;
- administration is important, management and equity of remuneration are major factors in motivation;
- participation of teachers in education planning should be the norm, and donors should require it as a pre-requisite of education funding;
- donors should contribute to teacher salaries in the same way as other education interventions.

Retrieved 11 October 2004 from:
http://www.eldis.org/static/DOC10583.htm

Garrett, R. 2000. 'Job Satisfaction: a hierarchy of needs for teachers?'

Job satisfaction for teachers in northern countries has been extensively researched. It is recognized as a significant factor in motivation and professional development. In the south, however, little investigation has taken place into job satisfaction within the teaching profession. Research by the University of Bristol examines the reasons for this neglect, looks at the importance of teachers in determining educational quality, and suggests ways forward when considering job satisfaction in developing countries. Policies based on sound data, it is argued, could radically improve teacher morale and proficiency and contribute towards the successful outcome of current education sector investment programmes being undertaken throughout the developing world.

Retrieved 6 October 2004 from:
http://www.id21.org/education/4arg1.html

The document is available at the same address.

Glewwe, P.; Ilias, N.; Kremer, M. 2003. *Teacher Incentives*. (Working Paper 9671). NBER Working Paper Series. Cambridge, MA: National Bureau of Economic Research.

Advocates of teacher incentive programs argue that they can strengthen weak incentives, while opponents argue that they lead to "teaching to the test." It was found that existing teacher incentives in Kenya are indeed weak, with teachers absent 20% of the time. The study then reports on a randomized evaluation of a program that provided primary-school teachers in rural Kenya with incentives based on students' test scores. Students in program schools had higher test scores, significantly so on at least some exams, during the time the program was in place. An examination of the channels through which this effect took place, however, provides little evidence of more teacher effort aimed at increasing long-run learning. Teacher attendance did not improve, homework assignment did not increase, and pedagogy did not change. There is, however, evidence that teachers increased effort to raise short-run test scores by conducting more test preparation sessions. While students in treatment schools scored higher than their counterparts in comparison schools during the life of the program, they did not retain these gains after the end of the program, consistent with the hypothesis that teachers focused on manipulating short-run scores. In order to discourage dropouts, students

who did not test were assigned low scores. Program schools had the same dropout rate as comparison schools, but a higher percentage of students in program schools took the test.

© 2003 by Paul Grewwe, Nauman Ilias, and Michael Kremer.

Retrieved 24 November 2004 from:
http://pythie.cepremap.ens.fr/~piketty/Papers/Glewweetal2003.pdf

The document is available at the same address.

Hanushek, E.A.; Kain, J. F; Rivkin S.G. 2004. "Why Public Schools Lose Teachers". In: *Journal of Human Resources, 39*(2), 326-354.

Many school districts experience difficulties attracting and retaining teachers, and the impending retirement of a substantial fraction of public school teachers raises the specter of severe shortages in some public schools. Schools in urban areas serving economically disadvantaged and minority students appear particularly vulnerable. This paper investigates those factors that affect the probabilities that teachers switch schools or exit the public schools entirely. The results indicate that teacher mobility is much more strongly related to characteristics of the students, particularly race and achievement, than to salary, although salary exerts a modest impact once compensating differentials are taken into account.

Retrieved 22 November 2004 from:
http://www.ssc.wisc.edu/jhr/2004ab/hanushek2.htm

A preliminary version can be downloaded at:
http://www.educationnext.org/unabridged/20041/76.pdf

Kelley, C.; Kimball, S.M. 2001. "Financial incentives for National Board Certification". In: *Educational Policy, 15*(4), 547-574.

This study explores the use of financial incentives for National Board Certification in the USA, focusing on why teachers pursue certification; the impact of linking pay to certification; and the effects of Board Certification on the teacher, school, and district. Findings suggest that the presence and source of a pay incentive helped to shape interest, understanding, and appreciation of the Board Certification process among teachers and administrators. Consistent with other studies, this data suggest that the process of undertaking the National Board Certification assessment represents a significant professional growth experience for teachers. Implications for policy-makers are discussed.

Liang, X. 1999. Teacher Pay in 12 Latin American Countries: How does teacher pay compare to other professions? What determines teacher pay? Who are the teachers? (LSCHD Paper Series No. 49). Latin America and the Carribean Regional Office: World Bank.

Throughout the Latin America region, teacher pay makes up 90% of national public education budgets, or between 2 to 6% of the entire gross domestic product (GDP). In the quest for educational quality and efficiency, there is little doubt that teachers in Latin America have or will become the centerpiece of the new educational reform. Using household survey data from 12 Latin American countries, this paper attempts to answer three questions: (1) how does teacher's remuneration compare to their counterparts in the labour market? (2) What are the determinants of teacher pay and how does teacher pay structure compare to that of the

private sector? and (3) if it is true that teachers are paid less for similar characteristics, why do people go into the teaching profession, who are the teachers?

Retrieved 11 October 2004 from:
http://wbln0018.worldbank.org/LAC/lacinfoclient.nsf/0/af300f57b0dbebaa8525684d0057cdc9?OpenDocument

The document is available at:
http://wbln0018.worldbank.org/LAC/lacinfoclient.nsf/0/af300f57b0dbebaa8525684d0057cdc9/$FILE/49.pdf

Lopez-Acevedo, G.; Salinas, A. 2001. *Teacher Salaries and Professional Profile in Mexico. (*LCSHD Paper Series. No. 63). Latin America and the Caribbean Regional Office: World Bank.

Teachers' salaries have often been highlighted as very important issue in discussions of school improvement. The level and structure of teacher remuneration are said to affect their morale and their ability to focus on and devote adequate time to teaching well. This paper examines who the teachers are, whether the teachers are underpaid and whether the teachers face lower or higher risk and uncertainty of having their standard of living reduced than their counterparts face. The results show that teachers in basic education consistently work fewer hours than their occupational counterparts. By means of regression analysis, it is shown that teachers in basic public schools are better paid early in their professional life compared to the other occupational groups and because the retirement benefits are usually generous, teachers hold on to the profession.

Retrieved 12 October 2004 from:
http://wbln0018.worldbank.org/lac/lacinfoclient.nsf/0/6b4e91202710b416852569f9006cd497/$FILE/63.pdf

The document is available at the same address.

Piras, C., Savedoff, W.D. 1998. *How much do teachers Earn?* Inter-American Development Bank, Office of the Chief Economist. (Working Papers No. 375). Washington, D.C: Inter-American Development Bank.

In the continuing debate over how to improve education systems, many people argue that teachers' salaries need to be increased. This paper seeks to establish a reliable method for analyzing the issue using household survey data from Bolivia. The question of "How much do teachers earn?" is divided into three distinct parts. The first part shows that teachers' monthly incomes are less on average than the rest of the labour market, but that their hourly earnings are higher. Teachers earn more than they would in the private sector, but less than in other unionized public sector jobs. Next, the study shows that teachers are relatively well-off in the overall distribution of income after accounting for other sources of income and life choices. The final section discusses the implications of these findings for policies to improve recruitment, retention, and motivation of high quality teachers.

Retrieved 5 October 2004 from:
http://www.iadb.org/res/publications/pubfiles/pubWP-375.pdf

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Vandenberghe, R.; Huberman, M. (Eds.) 1999. Understanding and preventing teacher burnout. A sourcebook of international research and practice. Cambridge: Cambridge University Press.

'Burnout' was first investigated in the 1970s as a crisis of overextended and disillusioned human service workers. But the nature of the syndrome has changed with the evolutions in the nature of these professions. The current experience of burnout is lived out in a more difficult social context, with human service workers struggling harder for social credibility and job security. For instance, through the greater demands on their time and energy, teachers are being pressed to do more work with fewer resources, while receiving fewer rewards and less recognition of their efforts. The objective of this volume is to provide new perspectives and a deeper understanding of the nature, conditions and consequences of burnout, notably in the teaching profession. To do this, the contributions review the most recent research in the field, describe research agenda and action agendas designed to combat the incidence of burnout in the workplace.

Voigt-Graf, C. 2003. "Fijian teachers on the move: Causes, implications and policies". In: *Asia Pacific Viewpoint, 44*(2), 163-175.

The migration of teachers – both internationally by way of emigration and internally within countries – may adversely affect the quality of education especially in a country like Fiji with a limited human resource capacity. The emigration of workers, particularly of highly skilled workers who are endowed with high levels of human capital, has severe implications for a small country like Fiji. The emigration of teachers who are the largest professional group of migrants has led to the filling of vacancies by less experienced and junior teachers and is widely believed to have led to falling educational standards. In addition to international migration, there is substantial internal migration of teachers, mostly away from remote schools to urban areas. Rural schools find it particularly difficult to recruit and keep qualified and experienced personnel. In the process, rural areas have been drained of some of their best human resources. This article provides an overview of the scale of migration of secondary teachers from Fiji, raises development issues connected to the international and internal migration of teachers, describes policy responses that this migration has elicited and identifies areas requiring further research with a view to making policy recommendations as well as contributing to the literature on skilled migration in the Pacific.

Retrieved 11 October 2004 from:
http://www.blackwell-synergy.com/openurl?genre=article&sid=vendor:database&issn=1360-7456&volume=44&issue=2&spage=163

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Carnoy, M.; Welmond, M. 1996. Do teachers get paid too much? A worldwide comparison of *teacher* pay. Mimeo.

Chapman, D. W.; Snyder, C.W., Jr.; Burchfield, S. 1993. "Teacher incentives in the third world". In: Teaching and Teacher Education, *9*(3), 301-316.

Cox, T.; Griffiths, A. 1995. *Occupational stress and burn-out of teachers: A review.* (Sectoral Activities Programme Working Paper, SAP 4.32/WP.84). Geneva: ILO.

Ellmin, R. 1995. Job satisfaction and decentralization: The effects of systemic change on Swedish comprehensive school teachers from 1988 to 1993. (Working paper. Sectoral activities Programme SAP 4.30/WP.80). Geneva: ILO.

Hatcher, R. 1994. ‘‘Market relationships and the management of teachers’’. In: *British Journal of Sociology of Education*, *15*(1), 41-61.

Quist, D.; Kaluba, H. 2001. Teacher management and support in Africa: publications and documents 1985-2000. London: Commonwealth Secretariat.

Sim, W. K. 1990. ‘‘Factors associated with job satisfaction and work centrality among Singapore teachers’’. In: *Comparative Education, 26*(2-3), 259-276.

IV. Teacher training and professional development

IIEP publications

Auduc, J.L. 1998. Training teachers to work in schools considered difficult. Paris: IIEP-UNESCO.

The task of working with disadvantaged young people at school puts teaching practice and identity of teachers to a stern test. It requires a specific form of teacher training.

Provision of specific training for those who intend to work with pupils considered difficult does not mean preparation for teaching of an entirely different kind. The abilities and strengths required by those who teach them can be mobilized in all schools. The problems encountered in classes considered difficult and the means to solving them are not peripheral to the system, but central to its transformation in a context where they appear magnified through assuming more explicit forms than in situations elsewhere, in which their presence is less immediately visible.

Training teachers for work in schools and/or classes considered difficult is thus a major challenge. Teachers have to be made actively aware of their occupation and their role, while a concerted drive is needed to ensure that no young people, whatever their origins, are left adrift and that all can develop their individual potential.

With examples drawn from French, European and North American experience, the author presents an outline of the issues and challenges at stake in ensuring that teacher training becomes the gateway to implementation of appropriate strategies for pupils to do well, and for managing the problems of authority, discipline and aggressive behaviour to which they may be susceptible.

He suggests ideas for further consideration, along with proposals for developing the teaching profession and rediscovering the values, ethics and sense of purpose of schools that possess real meaning for young people and their families.

Avalos, B. 1995. *Issues in science teacher education.* Paris: IIEP-UNESCO.

New or changed approaches to science education – such as integrated science, discovery learning, science for all, etc. – pose a series of crucial questions relating to teacher training: to what extent and in what ways are these new orientations considered and implemented within the context of science teacher education? How are teachers being prepared, through training, to stimulate more young people to interest themselves in science and the use of science and technology? What kind of training structures could assist the development of both a sound content foundation and an improved capacity to teach science subjects?

It is the purpose of this monograph to provide information and research results on the current situation of science teacher training and stimulate discussions about the most relevant related issues. Furthermore, this volume looks at crucial changes that are actually being experimented upon in different countries of the world – to improve the training of secondary science teachers in the light of the recent orientations of science education.

Villegas-Reimers, E. 2003. Teacher professional development: An International review of the literature. Paris: IIEP-UNESCO.

Teaching is a profession that carries with it a high degree of responsibility, and the qualifications and skills of those who take on this responsibility constitute a major factor that affects, be it positively or negatively, any education system. Furthermore, professional development in the field of teaching is a continuous process, which begins with pre-service preparation and continues until retirement. Good teaching methods have a significant impact on how and what pupils learn, and must be kept up-to-date and modified according to pupils' learning needs.

In order for educational reform to succeed, it is important to provide teachers with continuous professional development opportunities to accommodate the needs of pupils and of a changing society. In this booklet the author promotes both the concept of teaching as a profession and the necessity for both pre-service and in-service training of teachers. She also presents various models and examples of existing staff development programmes and provides clear guidelines for formulating policies and planning reforms. In so doing, she makes a comprehensive review of the body of literature already available on this emerging area of study.

ADEA working documents

Bah, E.A.M.; Diané, B.;Fofana, M., Fofana, D.; Bar, I; Fernandez, S.; Bah, K.; Dembélé, M. 2003. Country Case Study Republic of Guinea. The Reform of Pre-service Primary Teacher Training in Guinea (FIMG): Review-Results of Implementation. (Working Document). Ministry for Technical Education and Vocational Training. ADEA Biennial Meeting 2003, Grand Baie, Mauritius, December 3-6, 2003.

In October 1998, Guinea needed two thousand new teachers. In addition to this pressing need, there was a need to rethink pre-service teacher education given the soaring costs and low productivity of the existing model. The challenge was therefore to design a program that could provide the country with 6,000 contract teachers in three years and at lower unit costs while preserving quality. With technical support from a university of Quebec, Guinea designed a two-year model (known by its French acronym FIM-G) based on the German dual system of professional training, and conceptually oriented by active pedagogy, learning-centeredness, reflective practice, and socio-constructivism.

The program delivered 2,496 new teachers per year, compared with less than 200 previously while the unit cost is estimated to be lower than before. Beyond these figures, the graduates of the program are reported to be at least as good as graduates of previous programs.

This report examines the context of implementation of this training program, its content as well as its delivery methods. It then draws up the results of this reform and concludes with recommendations.

Retrieved 24 November 2004 from:
http://www.adeanet.org/biennial2003/papers/4C_Guinee_ENG_final.pdf

The document is available at the same address.

Ministry of Education, Culture And Sports 2003. Country Case Study – Zanzibar Teacher Professional Development in Zanzibar: A case Study of the Teacher Centres (working document). ADEA Biennial Meeting 2003, Grand Baie, Mauritius, 3-6 December 2003.

In 1996 Ministry of Education, Culture and Sports established Teacher Centres for the professional development of primary school teachers.

The objectives of the TCs are:

- to provide upgrading courses to the untrained and under qualified teachers;
- to improve the pedagogical skills of teachers through in-service trainings;
- to improve school management by training school heads and members of school committees;
- to improve teaching/learning through TC libraries and thereby help teachers to improvise learning materials.

The department of curriculum nationally manages the TCs, examination and teachers support under the Ministry of Education Culture and Sports. Each TC is run by a management committee (TC) of which the TC Coordinator is the secretary. Currently TCs run in-service training for teachers, provide library facilities, host distance education courses and serve as centers of all trainings in curriculum innovations.

Retrieved 23 November 2004 from: http://www.adeanet.org/publications_biennale/docs/Countrycases/CS_Zanzibar_eng.pdf

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Van Graan, M.; Pomuti, H.; Leczel, D.; Liman, M.; Swarts, P. 2004. Country case study – Namibia. Practising Critical Reflection in Teacher Education: Case Study of three Namibian Teacher Development Programmes (working document). ADEA Biennial Meeting 2003, Grand Baie, Mauritius, 3-6 December, 2003.

In this research three sub-studies are described which form part of the Namibian case study on how critical practitioner inquiry was adopted and adapted in three teacher education projects. The implications of the findings and the recommendations for *a way ahead* in teacher education are proposed.

The studies reported are part of ongoing assessment on the pre-service and in-service Basic Education Teacher Diploma (BETD PRESET and INSET). In Chapter 3, the challenges and successes of implementing a critical practitioner inquiry approach through action research in the BETD PRESET programme is investigated. In Chapter 4, the impact of a practice-based inquiry model in the BETD INSET programme is determined. In Chapter 5 of this study, a USAID initiative of a school and teacher self-assessment system, as part of a school improvement programme in four education regions in northern Namibia, is described.

It was found that teachers are able to reflect critically on their own practice and that these self-assessments become in line with their real performance on indicators as observed by outside observers. This happens gradually, as they progress through the process applied in the SAS/SIP model.

Retrieved 22 November 2004 from:
http://www.adeanet.org/publications_biennale/docs/Countrycases/CS_Namibia_eng.pdf

The document is available at the same address.

Additional detailed references

Akyeampong, K.; Furlong, D.; Lewin, K.M. 2000. *The costs and financing of teacher education in Ghana. (*MUSTER Discussion Paper No. 18). Centre for International Education, University of Sussex, Institute of Education.

This paper considers the teacher education system from a cost and financing perspective. It begins by providing an overview of the education system as a whole and the socio-economic context in which it operates. It then moves to focus on teacher education and analyzes enrolment at teacher training colleges (TTCs), tutor qualifications, and teacher supply and demand. It then draws a number of policy-related conclusions from this analysis. It notes that, in the context of significant population growth and teacher attrition, the outputs of TTCs need to increase if pupil-teacher ratios are to be kept at the current level and numbers of untrained teachers in the system are to be decreased. Therefore, to achieve this goal, three possible policy options and their consequences are considered in detail: firstly, resource allocation to teacher training colleges could be increased; secondly, internal efficiency in the TTCs could be improved; or thirdly, more radical alternatives could be considered, involving distance and modular approaches to teacher education, public/private partnerships, and more staged professional development in the early stages of a teacher's career, rather than the current "front-loaded" model of three years of pre-service training. The paper ends with a consideration of some aspects of the proposed "In-In-Out" reform in teacher education, which will increase teaching practice to one year, and highlights some of the cost implications and likely outcomes of such a policy.

Retrieved 4 October 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/mpd_18_11_02.pdf

The document is available at the same address.

Craig, H.; Kraft, R.J.; Du Plessis, J. 1998. *Teacher development: Making an impact.* (Working Paper). Washington DC: USAID/ABEL Project and World Bank, Human Development Network.

This study began as an update of promising practices in teacher education programs that have been particularly successful in enhancing student learning in their own context. Along the way of undertaking case studies in Bangladesh, Botswana, Guatemala, Namibia, and Pakistan, and collecting other research on promising practices, the study is expanded to include related topics, including the impact of teacher education on children's learning; effective teaching; trends in teacher development; teacher recruitment and retention; incentives; and evaluation, supervision, and management, including cost-related issues.

Some of the ideas are drawn from the case studies. Other ideas come from additional research literature. Key findings include: 1) Teacher education can make a difference to student achievement. 2) Teachers need to be actively involved in the change process. 3) Teacher development is about ongoing professional growth and support. 4) Teacher development is a process along a continuum of learning. 5) Alternative teacher education

programmes should be considered. 6) It is important to create conditions that lead to sustainability. The study also recommends fundamental changes in: system support, ongoing professional development in the early years, and ongoing professional development in the years after initial preparation.

Retrieved 21 October 2004 from:
http://www-wds.worldbank.org/servlet/WDS_IBank_Servlet?pcont=details&eid=000094946_99032505570045

The document is available at:
http://www-wds.worldbank.org/servlet/WDSContentServer/WDSP/IB/1999/03/31/000094946_99032505570045/Rendered/PDF/multi_page.pdf

Harley, K.; Barasa, F.; Bertram, C. 2000. "The Real and the ideal: Teacher roles and competences in South African policy and practice". In: *International Journal of Educational Development*, *20*(4), 287-304.

Recent policy documents specify occupational, professional and academic roles and competences for teachers. These documents require a significant shift to 'extended' professionalism. Do these roles and competences resonate with current classroom realities and practices? This question was addressed by mapping the practices of 'effective' teachers onto research schedules based on the six major roles prescribed by policy. In practice, teachers assumed roles that were more in accord with personal value systems, local cultures, and contexts. Some significant disjunctions at the interface of policy and practice raise serious questions about policy assumptions. 'Tissue rejection', a not unlikely possibility, would jeopardize the curriculum edifice upon which transformation and development depend. Worse, historically unequal schools could become more so.

"Reprinted from *International Journal of Educational Development*, *20*(4), Harley, K.; Barasa, F.; Bertram, C., ''The Real and the ideal: Teacher roles and competences in South African policy and practice'', 287-304, 2000, with permission from Elsevier".

Hayes, D. 2000. 'Cascade Training and Teachers' Professional Development.' In: *ELT Journal, 54*(2), 135-145.

This paper examines the experience of a nationwide in-service teacher development project in Sri Lanka that aims to remedy the potential deficiencies of cascade models of teacher development. It shows how project training and development strategies that are context sensitive, collaborative, and reflexive seek to involve teachers in managing their own professional growth, while taking account of frameworks agreed to at the national level.

Retrieved 15 November 2004 from:
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Kunje, D.; Lewin, K.M.; Stuart, J.S. 2002. *Primary Teacher Education in Malawi: Insights into Practice and Policy.* (MUSTER Research Report No. 3). Centre for International Education, University of Sussex, Institute of Education.

Malawi announced free primary education in 1994 soon after the transition to multi-party democracy. As a result, numbers enrolled in primary schools increased rapidly from

about 1.9 million to 2.8 million creating an unprecedented demand for new teachers. The Malawi government responded by introducing an emergency training programme for newly recruited untrained teachers. The existing full-time pre-career College-based training system was replaced by the Malawi Integrated In-Service Teacher Education Programme (MIITEP), comprising a total of four months College-based training and 20 months supervised teaching in schools. This, slightly adapted, remains the only method of training primary teachers.

Insights into the MIITEP are important both for Malawi and for other countries which have the problem of training large numbers of primary teachers to meet the demands created by commitments to Education for All.

Despite the evidence of under-performance and many problems in implementation, the research indicates that the MIITEP could be reinvigorated and modified in ways which could reduce costs, maintain output, and encourage a focus on achievable goals that would improve quality.

Retrieved 11 October 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/cr_3_11_02.pdf

The document is available at the same address.

Kunje, D. ; Chimombo, J. 1999. *Malawi: A baseline study of the teacher education system. (*MUSTER Discussion Paper No. 5). Centre for International Education, University of Sussex, Institute of Education.

This report is based on a review of literature on primary, secondary and primary teacher education in Malawi. The main emphasis is on primary teacher education and how it is related to primary education. Issues of pupil failure, teacher supply, quality of schools, quality of teachers, curricula, curriculum delivery and the associated costs have been highlighted as key to further understanding of what contributes to a teacher's effectiveness in the Malawian context.

Retrieved 4 October 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/mpd_5_11_02.pdf

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Lam, S.F.; Yuon F.L.E.; Mak, Y.S. 1998. "Support services to secondary school teachers in Hong Kong". In: *Education Journal, 26*(1), 77-99.

This study examines the support services to Hong Kong secondary schools. It consisted of two phases. The first phase employed qualitative method and information was collected from 5 focus groups of teachers, social workers and educational psychologists. The data collected in the focus groups paved the way for the quantitative research in the second phase of the study. Three questionnaire surveys were conducted with 1,185 secondary school teachers, 66 school social workers, and 9 educational psychologists, respectively. The surveys examined the utilization of support services among the teachers, the difficulties encountered by the teachers, the perspectives of the school social workers and educational psychologists on the scope, availability and difficulties of their services. It was found that secondary school teachers in Hong Kong did not have much support when they encountered difficulties in their work. It was most obvious for the difficulties which were embedded in the systems, such as

heavy workload and excessive administrative duties. This finding supported the need to change from the model of direct, remedial, and individual-oriented services to the model of indirect, preventive, and system-oriented services

Lewin, K.M.; Stuart, J.S. 2003. *Researching Teacher Education: New perspectives on practice, performance and policy.* Centre for International Education, University of Sussex, Institute of Education.

This Research Report synthesizes the findings from MUSTER (Multi-Site Teacher Education Research), a four-year programme of research on Teacher Education. It is focused on insights from Ghana, Lesotho, Malawi, South Africa and Trinidad and Tobago.

MUSTER has explored the process and practice of teacher education across a range of countries. Although the detail is complex, the MUSTER conclusions are clear. The Millennium Development Goals (MDG) relating to education cannot be met unless the supply of teachers is adequate to keep pupil-teacher ratios within reasonable limits, and the quality of their training is sufficient to result in minimum acceptable levels of pupil achievement. The cost of existing methods of training are such that simple expansion of existing capacity is often not financially viable. Improvements in efficiency and effectiveness are needed that can lower costs and expand output within sustainable budgets. It may also be necessary to consider alternatives to two or three-years full-time, pre-career training.

Retrieved 7 September 2005 from:
http://www.dfid.gov.uk/pubs/files/researchteachedpaper49a.pdf

The document is available at the same address.

Lewin, K.M.; Samuel, M.; Sayed, Y. (Eds) 2003. Changing Patterns of Teacher Education in South Africa – Policy Practice and Prospects. South Africa: Heinemann Press.

This book explores policy and practice in Teacher Education in South Africa and their implications for the future. It arises from the work of the MUSTER Programme co-ordinated by the University of Sussex in five countries, of which South Africa is one.

Teacher education in South Africa is in transition. The first wave of educational reform rightly focused on the need to develop a post-apartheid school curriculum and the new structures that were needed to support different approaches to learning. Teacher education was made a Provincial competence and left largely untouched until new norms and standards and a regulatory framework began to be developed. Recent developments in the governance, funding and rationalization of post school professional development and training have now begun to address the pressing needs to convert ideas into structures and learning opportunities. The incorporation of Colleges of Education into the higher education system and the reform of the national curriculum for schools invite a reappraisal of methods and content.

This book explores recent developments, anticipates future needs and reflects on underlying aspirations and conundrums. The contributors include many key individuals with a direct stake in teacher education policy in South Africa.

Lewin, K.M. 2002. "The costs of supply and demand for teacher education: Dilemmas for development". In: *International Journal of Educational Development, 22*(3-4), 221-242.

This paper explores some of the financial issues that arise for teacher education policy and practice in developing countries. It is based on the results of the MUSTER (Multi-Site Teacher Education Research) research programme. First it provides an overview of the context which shapes investment in teacher education across four countries. Second, each case is considered from different perspectives – a profile of the supply side, estimates of the costs of training, and an analysis of demand. This leads to some reflections on each case, which draw attention to the main issues. The final discussion draws out some implications for policy, including those arising from the inability of some training systems to meet demand at sustainable levels of cost. This create dilemmas in terms of whether to adopt systems that can produce large numbers of teachers at low costs which reduced time in college, or maintain expansive conventional full-time pre-career residential systems and accept shortfalls in the supply of teachers long into the future. The data analyzed here are derived from extensive MUSTER research in Ghana, Lesotho, Malawi and Trinidad and Tobago.

"Reprinted from *International Journal of Educational Development*, *22*(3-4), Lewin, K.M., ''The costs of supply and demand for teacher education: Dilemmas for development'', 221-242, 2002, with permission from Elsevier".

Lewin, K.M.; Ntoi, V.; Nenty, H.J.; Mapuru, P. 2000. *Costs and Financing of Teacher Education in Lesotho*. (MUSTER Discussion Paper No. 10). Centre for International Education, University of Sussex, Institute of Education.

This monograph explores the costs and financing of teacher education in Lesotho. First it develops an overview of the national context for teacher education and profiles the education system. Second, it describes the teacher education system and identifies recent trends in development. Third the system of funding is analyzed. Fourth, aspects of the internal efficiency of the National Teacher Training College (NTTC) are explored. Fifth, data on the selection of trainees and their subsequent performance are discussed. Sixth, information on the utilization of newly qualified teachers is presented. Seventh, an analysis is developed of the characteristics of supply and demand for new teachers and the costs of meeting the training needs created by planned educational development. The last section reaches some preliminary conclusions, which are as follows. Firstly, there is a need to continuously monitor enrolment growth and teacher supply and demand, as current supply is insufficient. Secondly, the costs of expanding existing training provision are unsustainable. Thirdly, in light of the fact that more new teachers need to be trained at lower cost, NTTC could significantly improve internal efficiency and consider reducing the length of full time tuition during training and increasing teaching practice; a greater degree of autonomy may also assist in this goal. However, even with changes NTTC is unlikely to be able to meet demand so there is a need to consider alternative approaches to teacher training, such as mixed mode distance delivery.

Retrieved 25 October 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/mpd_10_11_02.pdf

The document is available at the same address.

Lopez-Acevedo, G. 2001. Professional development and incentives for teacher performance in schools in Mexico. (LCSHD Paper Series No. 64). Latin America and the Caribbean Regional Office: World Bank.

Quality of education is a determining factor in competitiveness. In order to globally compete, Mexico would have to raise its standards beyond its current low achievement. Several innovations at Federal and state levels have been developed to raise the quality of basic education. One example is *Carrera Magisterial*, which is a professional development programme that was created as part of the National Agreement for the Modernization of Basic Education in 1992. This program is aimed to raise the quality of basic education through teachers' professional training, new learning presence in schools and improving working conditions.

This paper shows several important results. First, teacher's enrolment in *Carrera Magisterial* program has a positive impact on learning achievement. Second, the higher the level reached by the teacher in *Carrera Magisterial*, the lower the student learning achievement, particularly in rural areas. And third, teachers pedagogical behavior is of great importance when grading learning achievement.

Retrieved 8 November 2004 from:
http://wbln0018.worldbank.org/lac/lacinfoclient.nsf/0/4df743bf38434c26852569f90069daec/$FILE/64.pdf

The document is available at the same address.

Perraton, H (ed.) 2001. Teacher Education Through Distance Learning: Technology – Curriculum – Cost – Evaluation. Summary of Case Studies: Brazil, Burkina Faso, Chile, China, India, Mongolia, Nigeria, South Africa (two studies), United Kingdom. Paris: UNESCO.

Distance and open learning has been identified by UNESCO as a way of increasing teacher numbers and capacity. This document synthesizes case studies commissioned in order to find how best this form of learning might be used.

Each of the ten case studies is presented separately and findings and recommendations for further research are synthesized.

The document is available at:
http://unesdoc.unesco.org/images/0012/001242/124208e.pdf

Swedish International Development Cooperation Agency 2000. *Teacher education, teachers' conditions and motivation.* Stockholm: Sida.

This publication aims to demonstrate that Educational changes and reforms which are expected to take place in the classrooms must be reflected in teacher education. Teachers are expected to be the main facilitators of learning. Moreover, they are required to be administrators and act as the link between parents and the community. The gap between what is required from the ideal teacher and the skills that he/she possesses appears to be widening. In order to enable teachers to meet the various demands placed on their profession, it is increasingly recognized that teachers' skills need to be continuously upgraded.

One of the main recommendations of this publication is that teacher education system needs to be unified and coordinated, ensuring that pre- and in-service education is seen as one single process.

Reproduced by permission of the Swedish International Development Cooperation Agency (Sida) from '*Teacher education, teachers' conditions and motivation';* Stockholm, January 2000.

The document is available at:
http://www.sida.se/content/1/c6/02/34/21/TeachersEdu.pdf

'What Professional Development Structures Best Affect Classroom Instruction?' *Research Brief.* July 22, 2003, vol. 1.

This study examines the effects of professional development on teachers' instruction. It shows that professional development is more effective in changing teachers' practice when it is organized around the collective participation of teachers (from the same school, department, or grade levels), focused on active learning activities (teachers are allowed to apply what they are learning), and coherent (aligned with teachers' professional knowledge or community, as well as with state or district standards and assessments).

Retrieved 13 October 2004 from:
http://www.ascd.org/portal/site/ascd/template.MAXIMIZE/menuitem.03e1753c019b7a9f989ad324d3108a0c/?javax.portlet.tpst=d5b9c0fa1a493266805516f762108a0c_ws_MX&javax.portlet.prp_d5b9c0fa1a493266805516f762108a0c_viewID=issue_view&javax.portlet.prp_d5b9c0fa1a493266805516f762108a0c_journalmoid=0fe81470b9eaff00VgnVCM1000003d01a8c0RCRD&javax.portlet.begCacheTok=token&javax.portlet.endCacheTok=token

Yates, C. 2001. Teacher education at a distance: lessons and experience from Sub-Saharan Africa. England: International Extension College.

This paper begins by arguing for greater teacher education and development in sub-Saharan Africa, where, the author states, education systems have trouble recruiting and retaining enough quality teachers. The paper explores the evidence around whether teachers trained by distance education match up to those trained in colleges.

Retrieved 28 October 2004 from:
http://www.eldis.org/static/DOC11020.htm

The document is available at:
http://www.iec.ac.uk/resources/c_yates_paper_1.pdf

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Avalos, B. 1998. "School-based teacher development. The experience of teacher professional groups in secondary schools in Chile." In: *Teaching and Teacher Education, 14*(3), 257-271.

Buchbereger, F.; Campos, B.P.; Kallos, D.; Stephenson, J. 2000. Green paper on teacher *Education in Europe. High quality Teacher Education for High Quality Education and Training.* Sweden: Thematic Network on Teacher Education in Europe.

Cheng Y.C.; Mok, M.M.C.; Tsui, K.T. 2001. *Teaching Effectiveness and Teacher Development: Towards a New Knowledge Base.* Hong Kong: Hong Kong Institute of Education; Dordrecht (Netherlands): Kluwer Academic Publishers. See in particular Part II entitled: 'Research and Analysis of Teaching Effectiveness and Teacher Development' (pp. 25-183) and Part III entitled: 'The Teacher as a Professional in a Changing Context' (pp. 217-344).

Coolahan, J. 2002. Teacher education and the teaching career in an era of lifelong learning. (OECD education working paper No. 2). Paris: OECD.

Available at:
http://www.olis.oecd.org/OLIS/2002DOC.NSF/43bb6130e5e86e5fc12569fa005d004c/5b71d9d70e0f867cc1256c950053c48d/$FILE/JT00137131.PDF

Cornu, B. 2001. *Winds of change in the teaching profession.* Paris: French National Commission for UNESCO.*

Dembélé, M.; Miaro-II, B.-R. *Pedagogical Renewal and Teacher Development in Sub-Saharan Africa: A Thematic Synthesis. (*Working document). ADEA Biennial Meeting 2003, Grand Baie, Mauritius, 3-6 December, 2003.

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International Institute for Educational Planning 2004. *Raising Standards and Tackling Workload: The use of support staff.* Unpublished manuscript. Paris: IIEP-UNESCO; United Kingdom: Department for Education and Skills.

The document is available at:
http://www.unesco.org/iiep/eng/research/basic/PDF/teachers1.pdf

Dyer, C. 1996. "Primary teachers and policy innovation in India: some neglected issues." In: *International Journal of Educational Development*, *16*(1), 27-40.

Higginson, F.L. 1996. Teachers role and global change: an issue paper. Paris: UNESCO.

Hofmeyr, J.; Hall, G. 1995. *The National Teacher Education Audit: Synthesis report.* Pretoria: Department of Education.

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National Centre for Educational Research and Development. 1996. *Reinforcement of teachers' role in a changing world.* Cairo: National Centre for Educational Research and Development.

Nwaboku, N. 1996. Strengthening the role of teachers in a changing world. Dakar: BREDA.

OECD. 1998. Staying Ahead: In-service Training and Teacher Professional Development. Paris: OECD Centre for Educational Research and Innovation.

UNESCO Principal Regional Office for Asia and the Pacific; Asia-Pacific Centre of Educational Innovation for Development 1996. *Partnerships in Teacher Development for a New Asia: Report.* Bangkok: PROAP.

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V. Staff management: Legal framework, strategies and practices

IIEP publications

Davies, L.; Gunawardena, C. 1992. Women and men in educational management: an international inquiry. Paris: IIEP-UNESCO.

Who holds the power in the management of education has come under increasing scrutiny in many countries. This report traces the history of a research project which began by asking why there were fewer women than men in the senior management of schools and colleges across the world, and concluded by challenging the very nature of 'educational administration' itself. Using self-appraisal schedules with women and men teachers in African countries and in Sri Lanka, the project investigated their administrative roles; their needs from the organization; their perceptions of their future; and the intersection between home and work. The findings question previous conceptions about female socialization or dual roles, and implicate instead the capture of educational management by a masculine discourse which stresses competition, status and hierarchy. The resulting separation of management from teaching is argued to be both unproductive for staff and ineffective for pupils. Hence, serious shifts in management structures and management training are considered necessary.

Göttelmann-Duret, G. 2000. The Management of Primary Teachers in South Asia: a Synthesis Report. Paris: IIEP-UNESCO.

Optimizing the management of teachers remains an open challenge in many South Asian countries: shortage and high turnover of teaching staff, particularly in the remote rural areas, often coexist with surplus staff in urban schools; the rates of teacher absenteeism are considerable in most instances; teacher dissatisfaction with the current management and support practices is high; etc.

The present book refers in particular to the cases of Madhya Pradesh/India, Nepal, Pakistan and Sri Lanka in which IIEP investigated *the management of primary teachers* through the conducting of national monographs and the organization of a sub-regional workshop in the late 1990s; it shows that the problems outlined are, to a significant extent, due to serious shortcomings in the institutional capacity for human resource management in the education sector, particularly at the regional and sub-regional levels to which teacher management tasks are more and more devolved.

At the same time, the publication highlights a number of interesting measures which have been taken in the countries studied for the enhancement of teacher management, such as local recruitment and administration of teachers, incentives encouraging rational teacher utilization, and strengthening of the databases for teacher management at sub-regional levels – with their noted positive impact as well as their possible drawbacks.

Halliday, I.G.; Hogan, J. 1994. *Developing a database for teacher management.* Paris: IIEP-UNESCO.

Inefficient teacher deployment and management is in a large number of cases first and foremost due to a lack of adequate and reliable information on which rational

planning and routine management decisions can be based. What needs to be considered and done in order to establish and maintain an appropriate base for teacher management? Through what kind of measures and procedures can the collection, verification and use of relevant and reliable data be enhanced? How to make such a database easily accessible to planners and managers?

This monograph – which can be used as training material – addresses these and other crucial issues relating to the development and use of an efficient data-base for teacher management.

ADEA publications

Anim, N.; Halliday, I.G.; Rodwell, S. 1996. Management Structures: A study of the function and performance of teacher management structures in four African countries, Botswana, Ghana, Zambia, Zimbabwe. Teachers' World Series. ADEA Working Group on the Teaching Profession. London: Commonwealth Secretariat.

Responsibility for managing teachers – the largest cadre of public workers in many African countries – is often spread among various ministries and commissions. The problems inherent in this diffusion of management responsibility are compounded by weak management linkages among the employing authorities.

In some countries, teaching service commissions are thought to be the key to unlocking better management performance; other countries have adopted different teacher management structures including those where responsibility for managing teachers lies with a public service commission. To date, consideration of the role of the prevailing teaching management structure, the regulations which govern its operation and relationship with other authorities, and its functions, procedures and performance has regularly been omitted from major reform strategies of the past decade.

The document presents an overview of teacher management structures in four African countries, Botswana, Ghana, Zambia and Zimbabwe, with a view to identify the strengths and weaknesses of different arrangements. The structures and the procedures adopted in each country are compared and analyzed, examples of good practice noted, and issues explored.

Bitamazire, G.; Chinery-Hesse, J.; Dupigny, A.; Gwaunza, E. ; Lisk, I. and Rukanda, M. 1996. Legal Frameworks: A Study of The Legal Framework for Teacher Management in Three African Countries: Sierra Leone, Uganda, Zimbabwe. Teachers' World Series. ADEA Working Group on the Teaching Profession. London: Commonwealth Secretariat.

In Africa today, ministries of education are being challenged regularly on issues of management procedures, personnel grievances and conditions of service for teachers. It is important, for the sake of teachers, their pupils, their employers and the communities they serve, to provide for equitable conditions of employment and basic rights in the context of sound labour relations. In many countries, the legal framework for teacher management is problematic and there is a need for debate and reform action.

This document presents findings concerning the legal frameworks for teacher management in three African countries, Sierra Leone, Uganda and Zimbabwe, drawing on the reports of national studies undertaken by in-country researchers. The legislative frameworks in each country are summarized and analyzed in relation to international conventions and regulations. Particular attention is focused on the questions as to who are the teachers,

who are their employers and what is their relationship. An examination of the application of the laws in each country highlights certain problems surrounding implementation, some examples of good practice, and an assessment of the adequacy of existing frameworks. The importance of freedom of association, consultation, participation and negotiation emerges as a particular issue.

Halliday, I.G. 1999. *A Reference Guide For Teacher Managers.* Teachers' World Series. ADEA Working Group on the Teaching Profession. London: Commonwealth Secretariat.

This guide highlights procedures and practices aimed at assisting teacher managers. Checklists and references related to teacher management are included. The guide emphasizes the development of good management practices. It can be used to support management training programs for school principals, inspectors/advisors and education officers.

Major principles of good teacher management practices are discussed in particular: promoting the participation of staff in decision-making; being seen to be open to change; ensuring staff are sensitized to policies which seek to redress gender and other inequalities; encouraging administrative efficiency; being effective in the deployment of resources manpower, money and materials; conveying policies and procedures to staff at all levels, through a well structured communication system; providing continuous evaluation and monitoring of performance; ensuring opportunities exist for staff development and training.

Halliday, I.G. 1999. *Developing a Professional Teaching Service.* Teachers' World Series. ADEA Working Group on the Teaching Profession. London: Commonwealth Secretariat.

This document presents the rationale behind creating a national teaching council, presents guidelines and recommendations in creating and establishing such a body, and provides pertinent questions and answers on the role and function of a professional teaching service. Particular attention is paid to the management and role of professionally qualified teachers, as well as individuals from various backgrounds, who are assimilated in the education system to teachers.

Halliday, I.G. 1995. *Turning the Tables on Teacher Management*. London: Commonwealth Secretariat.

This publication targets senior administrators in the education service. It has two main purposes – to act as a reference book and as a training manual.

Traditionally, the restructuring of education management is 'top-down'. Changes at the top are considered first and then decisions on any consequential modification are taken at regional and district level. This manual 'turns the tables' on this method and develops a more participative approach to change. At the same time, it establishes the management principles on which such fundamental changes in practice should be based.

According to the author, management structures should be designed on the basis of an inverted pyramid with the classroom at the top and the Ministry of Education as the foundation supporting all that happens at school level with senior officers focusing on: policy-making, financial management and monitoring of the education service rather than day-to-day management issues which should be managed locally. In other words, the author argues that if quality in education is to be achieved, major management decisions should be taken at as local a level as is practically possible.

Departing from the conviction that each school is 'a self-contained, autonomous social system' providing effective, quality classroom education, the author advocates a fundamental

reorganization of education management structures. He pleads for enhancing local control by empowering head teachers and/or school boards with much greater responsibility than was ever envisaged. Among other things, he advocates development planning (at school level) in order for the school staff to be able to fulfil this responsibility. In addition, he insists on the necessity to motivate teachers and to involve them in order to obtain their commitment, a *sine qua non* condition for the success of such a reform. While advocating the prominent role of the local educationalists, the author also defines the respective roles of the other administrative levels namely the district officers and the central administration. By showing the advantages of devolution and decentralization, the author argues that they outweigh the disadvantages of moving power away from the centre.

An additional detailed reference

Synnerstrom, S. 1998. *Professionalism in Public Service Management: The Making of Highly Qualified, Efficient and Effective Public Managers*. SIGMA, National and International Approaches to Improving Integrity and Transparency in Government Conference: July 1998. Paris: OECD.

The author discusses the legal and institutional structures necessary for professionalizing and improving the management performance of the highest public service officials. He points out the importance of having clear structures and systems for the vertical delegation of authority and the horizontal coordination of policy-making, and in general establishing an administrative context in which top managers can carry out their duties in a professional and accountable manner. He articulates a series of objectives for top management reform, and considers the role of civil service legislation in safeguarding the quality of administration.

Retrieved 6 September 2004 from:
http://wbln0018.worldbank.org/Network/PREM/PREMDocLib.nsf/58292AB451257BB9852566B4006EA0C8/78F36936317B04048525671300046 81E

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Villegas-Reimers, E.; Reimers, F. 1996. 'Where are 60 million teachers? The missing voice in educational reforms around the world.' In: *Prospects: Quarterly review of education, 26*(3), 469-92.

Wang, C. 2002. ‘Minban education: the planned elimination of the “people-managed” teachers in reforming China’. In: *International Journal of Educational Development, 22*(2), 109-129.

VI. Special issues

1. Women teachers

IIEP publication

Gaynor, C. 1997. The Supply, Condition And Professional Development of Women Teachers. Paris: IIEP-UNESCO.

In most developing countries women are under-represented in school management and decision-making positions, earn less money than their male counterparts, are confined to low-status positions and have limited access to professional advancement. This report is aimed at educational planners and managers in developing countries and seeks to understand the situation of female teachers and identify key issues for their supply and career development. It is argued that equality in postings, training, support services and promotional opportunities for women and men are essential for the effective employment of teachers. To provide genuine equality of opportunity the system itself must be sensitive to gender issues.

The paper draws lessons from available studies on gender issues in the teaching profession:

- Enhance the supply and effective employment of women teachers, eg. lowering age-restrictions for entry to the profession.
- Reduce gender differences in subjects studied in teacher training.
- Improve the status, condition and career development of women teachers, e.g. review rules and regulations on posting, transfers and promotions for possible gender bias.
- Use appropriate research methodology, e.g. involve women teachers and utilize teachers' unions and organizations in research to investigate options for promoting gender equity in teaching.
- Promote gender-sensitive educational policy-making, management and planning, e.g. maintain sex-disaggregated records on teachers.

Additional detailed references

Croft, A. 2000. *Gender Gaps in Schools and Colleges: Can Teacher Education Policy Improve Gender Equity in Malawi?* (MUSTER Discussion Paper No. 14). Centre for International Education, University of Sussex, Institute of Education.

This paper looks at the potential role of initial teacher education in addressing gender inequities at different levels of the Malawian education system, and show how inequities at one level contribute to and reinforce inequities at other levels. Focus is on gender equity in the employment of teachers and teacher educators, although by discussing female teachers as role models, there is also some consideration of the promotion of gender equity in school achievement. The research on which the paper is based was carried out as part of a study of primary teacher education in Malawi, which is itself a sub-study of the MUSTER Project. The central argument of the paper is that as a result of the gender gap in education in Malawi, it is necessary to consider how teacher education policy might impact differently on women and men i.e. to mainstream gender in policy-making and implementation. The paper ends with a

number of policy recommendations, which are as follows. Firstly, there is a need for more involvement of stakeholders in policy-making. Secondly, the entrance requirements for initial teacher education should not be raised and there is an argument for lengthening the residential component of training and providing more language support for teachers. Thirdly, more boarding accommodation should be provided for female teachers. Fourthly, support should be provided for teachers intending to upgrade their qualifications. Fifthly, there is a need for teachers' professional development to pay more attention to gender issues. Sixthly, qualified teachers with experience of implementing free universal primary education should be recruited as tutors in the training college and more opportunities for upgrading should be provided for college tutors.

Retrieved 12 November 2004 from:
http://www.sussex.ac.uk/usie/muster/pdf/mpd_14_11_02.pdf

The document is available at the same address.

Hulton, L.; Furlong, D. 2001. *Gender equality in education: a select annotated bibliography.* Bibliography No. 10. Brighton: BRIDGE, Institute of Development Studies, University of Sussex.

Bibliography covers nine major themes:

- Factors contributing to the gender gap in formal education.
- Formal education and women's empowerment.
- Curriculum reform and the learning environment.
- Gender and mathematics, science and technology.
- Teacher education and school management.
- Non-formal education, adult literacy and informal training.
- Government and donor approaches to mainstreaming in gender and education.
- Guidelines for monitoring and evaluation of gender and education.
- Examples of good practice and lessons learned.

Retrieved 10 November 2004 from:
http://www.eldis.org/static/DOC8352.htm
The document is available at:
http://www.ids.ac.uk/bridge/Reports/bb10.pdf

Mujahid Mukhtar, E. 2000. Study on the increase of number of female teachers in rural schools. Islamabad: UNESCO.

Experiences of the developed, as well as developing countries, reveal that female teachers are often better equipped to bring up, and educate children at the primary level. Moreover, there is a greater need in the developing countries to focus on the rural population, and females in particular, for their literacy rate is significantly lower than the males. This is possible if there are trained teachers available in sufficient numbers to run schools in the rural areas.

These important aspects have been fully borne in mind to achieve EFA, as recommended by the High-level Meeting of the Secretaries of Education held in Nagarkot, Nepal in August, 1997, which was attended by Bangladesh, India, Nepal and Pakistan. The present study has been sponsored by UNESCO Regional Office in Bangkok, as a follow-up to the Nepal Meeting. It is a synthesis of earlier literature on the

subject and data generated from the provinces. Containing valuable information, it is especially important in the social context of Pakistan, where majority of the people living in the rural areas, prefer to send their daughters to schools, which are run and managed by female teachers.

For more information, please visit the UNESCO Islamabad office web site at: http://undp.un.org.pk/unesco/unescoisbf.htm

Sales, V. 1999. "Women teachers and professional development: gender issues in the training programmes of the Aga Khan Education Service, Northern areas, Pakistan". In: *International Journal of Educational Development*, *19*(6), 409-422.

In the area of this study, teaching continues to provide the vast majority of formal sector jobs available to women. Within teaching, women's restricted access to training is addressed by AKES, whose programmes appear to meet women's immediate needs for localized training. Nevertheless, women remain largely unrepresented beyond the lowliest levels of the Service. This paper considers why this is so, and explores strategies for facilitating their professional and career development. It stresses the need for a contextualized, gender-aware approach to teacher education, and an avoidance of a simple correlation between girls' and women's education and their broader empowerment.

"Reprinted from *International Journal of Educational Development*, *19*(6), Sales, V., ''Women teachers and professional development: gender issues in the training programmes of the Aga Khan Education Service, Northern areas, Pakistan'', 409-422, 1999, with permission from Elsevier".

Stacki, S.L.; Pigozzi, M.J. 1995. "Empowering female teachers as an interactive dialectic process: examples from South Asia" In: *Convergence, XXVIII*(3), 14-25.

In India, a component of the major national UPE initiative, the Teacher Empowerment Project, gives teachers decision-making powers and creative input in the classroom, and encourages them to help design and run their training seminars. This article argues that strong participation builds teachers' self-confidence and lifts their status in the eyes of the community. The article also shows that the project moves these teachers from the periphery into the very centre of the education process. As a consequence, these schools have become child-friendly because teachers are using participative student-centred pedagogy and children are involved in song and dance, creating materials, and helping to decorate and maintain classrooms. Parents, villages and supervisors are now helpers of the teacher and not adversaries who blame them for not doing their job or being unmotivated.

Warwick, D. P.; Jatoi, H. 1994. "Teacher gender and student achievement in Pakistan" In: *Comparative Education Review, 38*(3), 377-399.

This article analyzes the relationships between teacher gender and mathematics achievement among primary- (elementary-) school students in Pakistan. It addresses three central questions. First, is the gender of teachers related to the mathematics achievement of their students? Second, if the relationship occurs, does it arise from the gender of teachers or from conditions associated with gender, such as the difficulties urban women have in finding housing near rural schools? Third, if there are differences

in achievement by teacher gender, to what extent are the conditions explaining them unique to or distinctive of Pakistan? Are equivalent conditions found in US elementary schools?

Wylie, C. 2000. *Trends in feminization of the teaching profession in OECD countries 1980-95.* (Sectoral Activities Programme Working Paper, WP.151). Geneva: ILO.

This study was commissioned by the ILO to provide further analysis of material gathered in a preliminary report, and any further statistical material available to the author between mid-September and mid-November 1999. This is mainly already published material, including material collected by the European Commission in its series *Key data on education,* OECD figures, and some material supplied by Education International member unions. In addition, the study draws on two analyses of occupational segregation and feminized occupations, and the ETUCE Colloquium on Equal Opportunities, held in 1995.

The aspects of employment analyzed in the study are:

- occupational segregation within teaching, measured here by changes in the proportion of women taking headships;
- part-time employment;
- workload;
- pay.

The study concludes with recommendations for further work in this area.

Retrieved 26 October 2004 from :
http://www.ilo.org/public/english/dialogue/sector/papers/feminize/wp-151.htm

The document is available at the same address.

Other references listed

Gaynor, C. 1991. The Status of women teachers in Southern Africa. Geneva: ILO.

UNESCO New Delhi Office 2001. *Women teachers in rural India.* New Delhi: UNESCO New Delhi Office.

2. HIV/AIDS

IIEP paper

Coombe, C. 2000. HIV/AIDS and the education sector: the foundations of a control and management strategy in South Africa (draft document).

What should the South Africa Department of Education do in response to HIV/AIDS?

This document sets out to respond to a request from the UN Economic Commission for Africa for details about what is being done in South Africa to control and manage HIV/AIDS in the education sector, and to mitigate its consequences.

The author begins by giving an overview of the spread and impact of HIV/AIDS in South Africa, before looking more deeply at the impacts of the pandemic on the education sector, at both changes in demand for education and the reduction in supply of teachers. Having considered impacts, the paper looks at responses to HIV/AIDS, both at the national HIV/AIDS strategy for South Africa and at a number of efforts that have taken place to address the epidemic in the education sector.

The author concludes by calling on the Department of Education to take more notice of social and economic, rather than just health, factors in their response to HIV/AIDS. She also challenges them to develop strategies that can genuinely sustain quality of education that is relevant to the needs of employers.

Retrieved 15 November 2004 from
http://www.eldis.org/static/DOC10979.htm

The document is available at:
http://hivaidsclearinghouse.unesco.org/ev_en.php?ID=1504_201&ID2=DO_TOPIC

Additional detailed references

Bennell, P.; Hyde, K.; Swainson, N. 2002. The Impact of the HIV/AIDS epidemic on the education sector in sub-Saharan Africa: a synthesis of the findings and recommendations of three country studies. Centre for International Education, University of Sussex, Institute of Education.

What is the impact of the HIV/AIDS epidemic on primary and secondary schooling in sub-Saharan Africa (SSA)? How successful are prevention strategies? This study from the University of Sussex looks at the effect of HIV/AIDS on students and teachers in Botswana, Malawi and Uganda and assesses the actual and likely future impacts on the supply of and demand for educational services.

Total AIDS cases will rise drastically in the next decade and, without appropriate levels of support for adult careers, many more children will be caring for the sick. The impact on the education sector will, to a large extent, depend on implementing certain urgent measures, including:

- Developing a professional cadre of life-skills teachers in schools. This should be combined with the continued integration and infusion of HIV/AIDS in the curriculum, focusing on sexual abstinence and the use of condoms.
- Designing and implementing effective national HIV/AIDS strategies based on multi-sectoral community mobilization.
- Establishing national poverty-reduction programmes that support the most basic needs of all children, including those affected by the AIDS epidemic. The provision of home-based care programmes will do much to relieve the burden of care for children in AIDS-affected households.
- Basing morbidity and mortality projections on accurate information of HIV prevalence among school staff, to make them useful for planning purposes.
- Stopping sexual misconduct by school managers and teachers.

Retrieved 3 November 2004 from :
http://www.grc-exchange.org/info_data/record.cfm?Id=767

The document is available at:
http://www.sussex.ac.uk/usie/cie/aidssynpublished.pdf

Grassly, N. 2003. 'Economics exam: the cost of HIV in Zambia's education sector.'

HIV/AIDS hits schools hard, affecting both teachers and pupils. What is the economic impact in the education sector? Researchers from Imperial College London estimate HIV-related costs to the Ministry of Education and donors in Zambia. They argue for extra funds to provide an active care and prevention programme.

Retrieved 29 October 2004 from:
http://www.id21.org/health/h5ng2g1.html

United Nations Educational, Scientific and Cultural Organization 2000. *Impact on Teaching and Support Staff. (*HIV/AIDS and Education Programme, Harare Cluster Office).

This chapter describes the staffing situation in Malawi, both nationally and in the survey schools. The second section then pulls together the available data to assess current levels of mortality, morbidity and absenteeism by staff. The third section reviews the efforts that have been made to prevent and mitigate the impact of the epidemic on staff.

Retrieved.25 October 2004 from:
http://www.harare.unesco.org/hivaids/view_abstract.asp?id=258

The chapter is available at:
http://www.zimaids.co.zw/hae/webfiles/Electronic%20Versions/Impact%20of%20HIVaids%20on%20Pry%20and%20Sec%20schooling2.doc

Other references listed

ILO Code of Practice on HIV/AIDS and the World of Work.

Available at:
http://www.ilo.org/public/english/protection/trav/aids/code/languages/index.htm

The HIV/AIDS impact on education clearinghouse.

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http://hivaidsclearinghouse.unesco.org/ev_en.php

Bennell, P. 2003. *The Impact of the AIDS Epidemic on Schooling in Sub-Saharan Africa.* (Working Document). ADEA Biennial Meeting 2003, Grand Baie, Mauritius, December 3-6, 2003.

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Hamoudi, A.; Birdsall, N. 2002. *HIV/AIDS and the accumulation and utilization of human capital in Africa.* (Working paper No. 2). U.S.A: Centre for Global Development

International Federation of Free Teachers' Unions; World Confederation of Organizations of the Teaching Profession; World Confederation of Teachers; Fédération internationale syndicale de l'enseignement, 1994. *World Consultation of Teachers' Organizations: Consensus Statement on AIDS in Schools.* Paris : UNESCO.

VII. Newsletters

IIEP newsletters

"Teachers: a priority" in:

IIEP Newsletter, vol. *XXII*(1).
Available at:
http://www.unesco.org/iiep/eng/newsletter/2004/jane04.pdf

"Teacher management – addressing the challenges"; in:

IIEP Newsletter, vol. *XIX*(2).
Available at:
http://www.unesco.org/iiep/eng/newsletter/2001/apre01.pdf

ADEA newsletters

Information on ADEA Working Group on the Teaching Profession is provided in:

ADEA Newsletter, vol.*16*(2), p. 11.
Available at:
http://www.adeanet.org/newsletter/Vol16No2/V16N2_eng.pdf

ADEA Newsletter, vol.*15*(1), p. 19
Available at:
http://www.adeanet.org/newsletter/Vol15No1/V15N1_eng_coul.pdf, and

ADEA Newsletter, vol. *17*(1), p. 16.
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"Guinea: Teachers at the center of their own professional development" (p. 8); "Using Job Specifications to Manage Primary Education in Senegal" (p. 10). In:

ADEA Newsletter, vol. *14*(3).
Available at:
http://www.adeanet.org/newsletter/Vol14No3/V14n3-eng_coul.pdf

"Towards Competent Management of Teaching Staff". In:

ADEA Newsletter, vol. *13*(4), p. 19.
Available at:
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"Guinea: A Communication Strategy to Facilitate Teacher Redeployment"; in:

ADEA Newsletter, vol. *12*(4)
Available at:
http://www.adeanet.org/newsletter/Vol12No4/09.html

"Teacher Recruitment and Compensation Policies and the Growth of Enrolment in the Countries of the Sahel". In:

ADEA Newsletter, vol. *10*(1)
Available at :
http://www.adeanet.org/newsletter/Vol10No1/en_8.html

FAWE newsletter

"The teaching profession in sub-Saharan Africa – Where are we? Where are we going?" *Special issue:*

FAWE News, vol. *10*(3)
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http://www.fawe.org/publications/Information/Newsletters/FNews10-3.pdf

ANTRIEP newsletters

"Teacher Management: Issues and Innovations" in:

ANTRIEP Newsletter, vol. *6*(1)
Available at:
http://www.antriep.net/html/Antriep%20Jan-June2001.pdf

"Place and Role of Women in Educational Management"; *Special issue*, vol. *8*(2).

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http://www.antriep.net/html/antriep%20jul-dec%202003.pdf

Miscellaneous

"Teachers in the change process. How can we attract new talent into the teaching profession?" In: *Innovation*, N° 93.

Summaries present policy thinking on:

- how to attract the most talented young people to the teaching profession;
- how to connect pre-service training with the requirements of professional activity in an efficient manner;
- how to support the initial years of teaching raised by profound social, economic, cultural and technological changes that our modern society is experiencing.

Available at:
http://www.ibe.unesco.org/International/Publications/Innovation/InnovationPdf/inno93e.pdf

"Quality teachers for quality education. Teacher recruitment and retention and EFA"; in: *Worlds of Education Magazine* (2004), Education International.

This edition of the magazine 'Worlds of Education', published by Education International, examines the issues of teacher training and teacher retention. It also discusses the impact of insufficient numbers of trained teachers on progress towards meeting the Education for All goal by 2015.

Articles in this edition include:

- Brazil: A country of 2.5 million teachers;
- co-operation with Iraqi teachers;
- teacher's rights;
- the right to teach: the right to learn;
- walking a fine line between claims and dialogue.

Retrieved 8 November 2004 from:
http://eldis.org/static/DOC15786.htm

IIEP publications and documents

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