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Educational Decentralization: Issues and Challenges

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Executive Summary

Since the 1980s, the transfer of educational decision-making authority and responsibility from the center to regional and local systems has become an increasingly popular reform around the world. At least eight, often interrelated, goals are driving the change: accelerating economic development by modernizing institutions; increasing management efficiency; reallocating financial responsibility, for example, from the center to the periphery; promoting democratization; increasing local control through deregulation; introducing market-based education; neutralizing competing centers of power such as teachers unions and political parties; and enhancing the quality of education (for example, by reducing dropout rates or increasing learning).

In pursuit of these goals, several policy guidelines have proven useful:

- *Begin with an analysis of the current educational system.* Policy makers can design a better reform strategy if they understand the strengths and weaknesses of the existing system. Such areas as management efficiency, evaluation capacity, effectiveness of information systems and budgeting, research productivity, the adequacy of the curriculum, the quality of classroom teaching and learning, and community involvement should be examined.
- *Understand the stated and unstated goals driving reform.* Distinguishing between stated and unstated goals, and understanding the importance of each type of goal to parents, teachers, administrators, education authorities, and other key actors, is critical.
- *Develop a common vision of reform among potentially competing centers of power.* This is essential if collaboration, rather than conflict, is to become the dominant force

driving actions. To this end, it is important to initiate an open flow of ideas and information among key actors.

- *Develop a plan that is simple, clear and realistic.* Most decentralization reforms are initiated with the center having only an abstract (or quite unrealistic) plan. Instead, the plan should specify the necessary pre-conditions for change. These include such factors as training regional and local leadership; transferring or retiring personnel; modifying traditional decision-making roles; and developing co-financing formulas at the national, regional, and local levels which will be needed to carry out assigned tasks, such as curriculum development and school maintenance.
- *Conduct an organizational and management analysis early in the process* to determine where in the educational system specific responsibilities and authority should be assigned. No such assignment should be made until the essential support, including financing and technical training, exists to carry out decisions.
- *Transfer authority incrementally, rather than all at once.* Politicians and educational policy makers are always attracted to the simultaneous "all-regions-at-once" mode of decentralization because of the potential for quick and dramatic change. However, the complexity of a decentralization program (often coupled with the lack of experience with the process, the unequal distribution of human and material resources, and the existence of both weak and strong regional infrastructure) makes this strategy extraordinarily difficult to execute successfully. An incremental approach, in which various parties adopt change at different rates as they are ready, enables those on a slower track to learn valuable lessons from those on the fast track.
- *Be willing to share power.* The exercise of power in a large organization brings psychological as well as material rewards that senior officials are often reluctant to give up or share with regional/municipal officials. Consequently, national officials who have extensive experience managing a centralized system are usually not the best candidates to manage a decentralized system.
- *Think long term.* Decentralization is not created by passing a law. Rather, it must be built by overcoming a series of challenges at the center and the periphery. Years, rather than weeks or months, usually pass before reform occurs. Some regions may move faster than others at first because they are better prepared to change (for example, they benefit from stronger administrative infrastructures, greater financial resources, or less politicization).

In the final analysis, the chances for successful change are greatly enhanced if the decentralization process results in transferring positive opportunities to the regions/municipalities rather than problems and burdens, such as badly maintained schools, poorly trained teachers, or heavier financial demands without the means to pay.

This document addresses several critical issues related to educational decentralization. It concludes with a series of insights to guide policy makers, based on international experience.

Educational Decentralization: Issues and Challenges

by E. Mark Hanson

With the disappearance of military/autocratic governments in Latin America during the 1970s and 1980s, emerging democracies increasingly looked to educational decentralization as a way to improve administrative services, increase the quality of education, share power with the local citizenry, and advance the pace of national development. That shift coincided with a worldwide movement, spanning federal systems of government (including those in Argentina, India, Nigeria, and the United States) as well as unitary systems (such as those in Colombia, Pakistan, and Papua New Guinea), in large countries (such as Australia, Canada, and Spain) as well as small (such as El Salvador, Malta, Nicaragua, and Zaire).

Understanding the distinct variables and processes that make up these reforms can be a daunting task. Using key questions as an organizing device, this document identifies and explains the fundamental issues, goals, processes, and strategies that shape educational decentralization initiatives in Latin America. In addition, the report discusses the possibilities and pitfalls associated with decentralization processes, particularly as they are associated with political, financial, institutional, and educational quality issues. The document concludes with a series of policy considerations that can help guide the thinking and planning of leaders who are involved in decentralizing a public educational system. In evaluating the material presented here, it is important to note that because the countries of Latin America are so different in their political, economic, and social makeup, the historical experience (good or bad) of a strategy introduced in one country is not necessarily predictive of what might happen in another.

PART I: NATIONAL AND REGIONAL ISSUES

Q. What is decentralization?

A. There are three major forms of decentralization:

- *Deconcentration* typically transfers tasks and work, but not authority, to other units within an organization.
- *Delegation* transfers decision-making authority from higher to lower hierarchical units. However, this authority can be withdrawn at the discretion of the delegating unit.
- *Devolution* transfers authority to a unit that can act independently, or a unit that can act without first asking permission. *Privatization* is a form of devolution in which responsibility and resources are transferred from public sector institutions to private sector ones.

Understanding the differences between the distinct types of decentralization is essential because they determine the amount, type, and permanency of authority to be transferred.

Policy Lesson: Devolution, rather than delegation of authority, has a better chance for long-term success because it provides for continuity in the process of change.

Q. What are the goals and strategies of educational decentralization?

A. There are no generic organizational and management strategies of educational decentralization. Typically, specific strategies are keyed to specific goals. Thus, successful decentralization requires knowing the stated and unstated goals driving reform. There are at least eight, often interrelated, reform goals:

1. *Accelerated economic development.* Often a desired outcome of decentralization, this goal was the centerpiece of Venezuela's regional decentralization initiative in the 1970s because too much of the nation's power, wealth, executive talent, and population was concentrated in the capital city. "Caracas is Venezuela and Venezuela is Caracas" was the slogan of the day. The goal of decentralization was to create nine geographically distributed, socio-economic growth poles as engines of regional development. The government established integrated branch offices of all government ministries (including an Office of Education) within each of the nine regions and delegated to them the authority to plan, execute, and manage integrated development projects financed by the central government.¹

2. *Increased management efficiency* This is a stated goal of (such as faster decision making, reduced bureaucracy or increased commitment). virtually all decentralization initiatives.

3. *Redistribution of financial responsibility.* Stated or unstated, this is a primary goal seen often in recent years (for example, in Argentina, Chile, Colombia, Mexico, Nicaragua, and the United States). Sometimes new national laws force financial responsibility for

education upon the regional or municipal governments, giving them little or no say as to whether they are willing to accept it. At other times, the regions and center negotiate co-financing arrangements that are acceptable to both. In Poland, a nation-wide decentralization process moved smoothly in the mid-1990s principally for two reasons. First, the municipalities were more healthy financially than the central government and could absorb the additional economic burdens. Second, the municipalities felt they could manage the schools in their areas much more effectively than the distant central government.²

In other cases, multinational lending/donor organizations require countries (such as Argentina between 1989 and 1991) to reduce their level of central government spending before extending a loan or grant.³ Under this arrangement, educational expenditures are often passed down to regional and local levels.

4. Increased democratization through the distribution of power. There are two major variations of this goal. In the first, the national government devolves authority to selected (or all) regions in order to dissuade them from initiating acts of rebellion. In Spain following the death of General Franco, for example, the new government moved rapidly to provide semi-autonomous self-rule (including considerable discretion in education) to rebellious regions of Catalonia, Galicia, and the Basque Territory.⁴

The second major variation uses decentralization as a means to reinforce the state's legitimacy.⁵ Colombia, for example, in the face of socio-economic and political chaos (from such factors as drug cartels, terrorist guerrillas, and political corruption), is transferring power to the regions/municipalities in an attempt to save the nation through greater citizen participation in education and other public affairs.⁶ Nicaragua and El Salvador are building stronger democratic bases by extending institutional controls, particularly in education, to the local level (municipalities and parents).

5. Greater local control through deregulation. Driving this goal is the notion that increased flexibility at the school level will permit decision making to be faster, more informed, more flexible, and more responsive to local needs than decisions made in the capital city. In Spain and Nicaragua, and in many educational districts in the United States, school-based management has become a cornerstone of decentralization movements. Local school councils made up of elected parents, teachers, staff members, and sometimes students have been granted the authority to hire and fire the school director, approve school expenditures, manage the discipline program, and evaluate the progress of the school's academic program.⁷

6. Market-based education. Through the use of government financed per-pupil subsidies such as vouchers, parents can enroll their students in public or private schools of their choice. This strategy of allowing parents to select schools is gathering support in many countries. The rationale is that when schools are required to compete for students in order to survive and prosper financially, the quality of education will improve. The most extensive voucher program in the Western Hemisphere is in Chile. In the early 1980s, the

public schools (including buildings, teachers, and administrative personnel) were transferred to the control of municipalities or private corporations.⁸

Market-based education can involve the private sector in two ways. Private sector funds can be used to support public schools. For example, parents can pay special fees to purchase instructional materials. Alternately, public funds can be used to support private sector activities, such as contracting out school construction or providing psychological services.

7. Neutralizing competing centers of power. This goal is usually part of a hidden agenda. Under the guise of decentralization, power is taken from influential groups, such as teachers unions, city mayors, state governors, or political parties, and transferred to other groups more supportive of ministry policies, such as parent councils or municipal governments. This happened in Chile and Mexico.⁹

8. Improving the quality of education. Almost all decentralization reforms identify this as a goal. The expectation is that decision making closer to the school level will better adapt the curriculum to local settings, foster a greater sense of ownership, improve student and teacher motivation, encourage parent participation, and increase community willingness to contribute financially to schools.

Policy Lesson: The more a decentralization initiative involves transferring positive opportunities to the regions or municipalities, rather than problems and burdens, the greater the chances for success.

Q. Can an educational system truly be decentralized?

A. An effective decentralization strategy requires a balanced, power-sharing arrangement between the center setting policy and the periphery carrying it out. For example, the Ministry of Education may set policy on minimum teacher qualifications, but the actual hiring of teachers would be done locally according to that policy. In the latest decentralization reforms in Argentina, Colombia, and Mexico, the Ministries of Education have retained centralized authority over national policy, curriculum frameworks (but not specific content or materials), information generation and management, academic evaluation, and specialized training. These ministries also have assumed responsibility for implementing compensatory education programs designed to increase equity within school systems for student groups and geographical regions that traditionally have been neglected.

The power-sharing arrangement devised by reform planners must avoid the classic problem often encountered in Latin America where responsibility is decentralized—but

the necessary authority, training, or financing to carry out the tasks is lacking. Consequently, an organization and management analysis should be conducted early to determine where in the educational system specific responsibilities and authority should be assigned, and no such assignment should be made unless the essential support (such as financing and technical training) exists to carry out decisions. Surprisingly, most decentralization reforms are initiated with very little previous study and a minimal amount of serious planning.

Policy Lesson: For effective and efficient organization and management, an educational system must simultaneously support some centralized and some decentralized decision making, depending on the type of decisions and actions involved.

Q. Does a shared vision exist among centers of power?

A. There are three critical forces that often determine the fate of decentralization initiatives. First is *the extent to which the political parties hold a shared vision* about the significance of the reform, its strategy of development, and its political identity. If the decentralization initiative is identified with a particular leader or political party, it may not last beyond the next election (for example, Venezuela in the 1970s). At the other extreme, where several political parties battle to get their own particular version of the reform adopted as national law, the final result is often a law so abstract and watered down that it permits all parties to claim victory. The more productive approach is that taken in Spain in 1978. The various political parties negotiated a comprehensive decentralization strategy that was identified with the nation and not the party in power.

The second critical element is *the extent to which key public sector institutions at the national, regional, and local level possess a shared vision* of the reform. In Colombia in the early 1990s, for example, there was clear agreement that educational decentralization was needed. However, many powerful public institutions, including the Ministries of Finance and Education, the Department of National Planning, and national, state, and municipal legislative bodies, battled to shape the form and content of the reform based on their own visions and needs. Jobs, budgets, prestige, and careers are at stake and fuel these types of inter-institutional struggles.

The third major issue is *whether parents and local community members support decentralization enough to commit the extra time, energy, and resources required to make it work*. Compounding the problem is that the local citizenry often knows little of what is expected of them, or the benefits that are supposed to result. This lack of local awareness is quite common in nations with long histories of centralized government. These countries are accustomed to sending out directives and do not understand (or feel)

the need to "market" reform at the local level by informing members of the public or communicating or exchanging ideas with them.

In the final analysis, the greater the accepted vision of decentralization among the distinct centers of power, the greater the chance for successful change.

Policy lesson: Major educational reforms tend to live or die based on political, rather than on technical, considerations.

Q. Who controls the decentralization process?

A. Control was a central issue in both Colombia and Venezuela. Both nations had elected (rather than appointed) governors and mayors for the first time when new decentralization initiatives began in the late 1980s and early 1990s. Barriers to the educational reforms quickly developed as the governors in Venezuela and many large city mayors in Colombia refused to accept responsibility for the national schools, which until then had been the responsibility of the Ministries of Education. The critical question became, who controlled the decentralization process—the central governments deciding what they wanted to transfer, or the elected governors and mayors determining what they were willing to receive? In Venezuela, the governors insisted on the right to accept responsibility for only the well-maintained schools, properly trained teachers and administrators, and those educators that had fully funded retirement programs. Only recently, after extensive negotiations, have the first states finally begun to accept responsibility for the national schools in their territories.

Policy Lesson: National/regional/municipal power-sharing arrangements are more effective when the terms of transfer are negotiated, rather than imposed.

Q. How do governments deal with teachers unions?

A. The likely opposition of powerfully organized teachers unions is one of the central problems facing decentralization reforms in any Latin American country. This opposition is based on the fear that decentralization will break up national collective bargaining, reduce teacher power, and, consequently, result in declining salaries and working conditions. Based on historical experience in such countries as Argentina, Chile, and Mexico, this fear is not without justification. The increased financial responsibility often falls to regional and municipal governments that do not have the financial or human resources to assume the added obligations.

Moreover, the relationship between the government and the unions is often characterized by distrust as each group tries to control the actions of the other. While the unions' principal strategy is to strike or otherwise withdraw services—or to threaten to do so—, national governments have developed strategies that range from complete political domination of the unions at one extreme, to breaking them up at the other. The close alliance between union leadership and the political party in power under the AD (Acción Democrática) party in Venezuela during the 1960s or the PRI (Partido Revolucionario Institucional) party in Mexico in the 1980s are good illustrations of the domination strategy. When the unions are under tight political party control, they are not in a position to challenge decentralization initiatives.

At the other extreme, reformers may pass a law that uses decentralization to take power from teachers unions and transfer it to more supportive bodies, such as parent councils. In the 1980s, Chile broke the power of the national teachers union by municipalizing and privatizing education, thus making teachers the employees of municipal governments or private schools.

When cast in a "win-lose" scenario (the government wins, while the union loses, for example), the process of educational decentralization will almost always generate major conflicts and encounter substantive barriers. Writing about the recent Mexican decentralization initiative, one observer explains, "This wave of reform will prove successful in the long run only if teachers as a group and as an occupation become more adequately supported under state and local governments than they have been of late under the national policies."¹⁰ In other words, for reforms to succeed, teachers must also gain from decentralization.

Some nations are already seeking to gain teachers union support for decentralization by looking for ways to create more of a "win-win" situation. Chile in the 1990s, for example, developed a much coveted Teachers Law (Estatuto Docente) that provides for a minimum salary, professional training, job stability, additional payments for seniority, recognition of professional qualifications, and benefits for working in difficult areas. Nicaragua has authorized the use of parent donations (supposedly voluntary) to support the salaries of teachers in decentralized schools. Some countries, including Argentina, Colombia and Venezuela, are attempting to develop and maintain co-financing formulas at the national, regional, and/or municipal levels that are acceptable to the teachers unions.

In the final analysis, a significant degree of tension will probably always exist between central governments and teachers unions. However, if both sides adopt a strategy of thoughtful "win-win" negotiations intended to improve the conditions and quality of education for all the stakeholders, including parents, students, and teachers, then the support generated will make effective decentralization possible.¹¹

Policy Lesson: The government and the teachers union(s) can be allies in the decentralization process if both institutions benefit from the reform.

Q. What are the strategies of financial decentralization?

A. Most decentralization strategies, whether openly or not, seek to transfer some degree of financial responsibility for education to regional and/or municipal governments or the private sector. Assuming that resource mobilization capacity exists at lower levels (for example, through taxing authority or privatization plans), a reasonable degree of responsibility for financial decentralization can be healthy for the development of education. Quite simply, *when regional and local governments are investing their own resources, they tend to take greater care in how the money is spent.*

Governments use various approaches to decentralize financial responsibility. One is simply to *transfer responsibility to the provinces*. Argentina's military government did this in 1978, simply dropping total financial responsibility for 6,700 national primary schools onto the provinces—and a decade of financial chaos followed. Then in the early 1990s, Argentina transferred responsibility for 3,578 national secondary schools (including technical and subsidized private schools) to the provinces under a co-financing formula. At the time, many provinces were paying higher salaries for the teachers already under their jurisdiction than the central government had been paying its teachers. Consequently, to establish salary equity with the transfer, the provinces had to assume an additional financial burden by raising the salaries of the central government teachers they inherited.¹² Teachers have gone on strike many times for unpaid wages following the transfer, particularly in the poorer provinces, because Argentina does not have an effective mechanism for equalizing educational resources.

Another approach is tied to *growth in the educational system*, such as hiring more teachers, financing new construction, or buying more instructional equipment. In the early 1990s, Colombia introduced a strategy whereby the central government would continue to transfer a fixed sum to the regions and municipalities, but the regions and municipalities would have to fund the growth in the educational system.

Still other countries try a *block grant approach*. Spain used this option with public administration at the regional (autonomous community) level. Each autonomous community could select and pursue its own priorities—for example, health, education, or transportation—using funds generated regionally and nationally. In some autonomous communities, the educational system received a high priority, and in others it did not. In addition to obtaining grant money, regional governments could also borrow funds to support their development priorities. Ten years after the reforms were initiated, several regions had accumulated worrisome levels of indebtedness.

Financial strategies featuring *educational privatization* are also generating considerable interest in Latin American and the United States. Privatization can operate in two directions: the use of private sector funds to support public schools, or the use of public funds to support private schools. Examples of the first are: parents voluntarily or involuntarily paying matriculation fees for admission to public schools; parents paying

special fees for their children to participate in extracurricular activities, such as band or football; real-estate developers paying a special fee for each new house constructed to go for new school construction; the community paying the salaries of teachers for government-constructed schools (or vice versa); and proceeds from the school snack shop or parent fund-raising activities being used to support the public school.

Privatization that uses public funds to pay for private sector services is also gaining popularity. For example, private businesses may perform services in public schools, such as providing maintenance and janitorial services, overseeing security, or preparing food. In the United States privatization experiments designed to improve management efficiency and the quality of education are also underway in large, troubled school districts. Under limited-term contracts, private businesses manage individual public schools or entire school districts. These businesses receive revenue based on efficiency savings and documented increases in educational quality. Thus far, the results of these privatized management experiments have been mixed and long-term research is not yet available.¹³

One privatization reform with far-reaching consequences is to provide parents with government *vouchers* (monetary grants for a specified amount) which they can then spend to enroll students in private or public schools. Chile, under the military government of the 1980s, adopted a variation of the voucher privatization strategy. The Ministry of Education transferred all public school property to the municipalities. Parents could select the private or public school they wanted their children to attend and pay for admission with government-issued vouchers. The municipalities were authorized to augment these national vouchers with their own revenues. After a short period of time, they had to do so because of a decline in the value of the vouchers.¹⁴

Policy Lesson: Local initiative is significantly reduced when total educational funding is dependent on the central government's budget.

Q. How does time in office influence a decentralization effort?

A. The short span of time many educational leaders spend in office poses a critical problem for any major educational reform, particularly for one as turbulent as decentralization. In Argentina, Bolivia, and Colombia, the average tenure of ministers of education over the last several decades has been less than 18 months, not an unusual situation in Latin America. When ministers change, senior and mid-level managers typically change as well, thus providing even less continuity to reforms underway.

A relatively rapid turnover of senior educational leaders has severe consequences. These managers typically have insufficient time to learn the job, plan, and initiate the decentralization strategy, and see it through its developmental stages. Complicating the

task is the fact that senior appointments are often based on political qualifications, rather than technical ones.

Policy Lesson: A successful decentralization initiative requires strong and trained leaders who have sufficient job stability to carry out a well-designed plan.

Q. Is incremental or "all-at-once" decentralization the best strategy?

A. Politicians and educational policy makers are almost always attracted to the simultaneous "*all-regions-at-once*" model of decentralization because of the potential for quick and dramatic change. However, the complexity of a decentralization program (often coupled with the lack of experience with the process, the unequal distribution of human and material resources, and the existence of both weak and strong regional infrastructures) makes this strategy extraordinarily difficult to execute successfully.

One specialist points out that in Argentina, only a minority of the provinces had the institutional capacity to absorb the operation of the transferred schools "in a harmonious fashion without conflict."¹⁵ Colombia also tried to initiate an all-at-once strategy, even though when it began in the early 1990s the Ministry of Education estimated that only about 200 of the 1,024 municipalities had sufficiently strong administrative infrastructures to manage the educational process. Serious problems with the reform design immediately surfaced.¹⁶

In contrast, some countries pursue an *incremental approach*. Spain, for instance, adopted fast, medium, and slow tracks in its decentralization program. Before authority could be transferred, specific criteria had to be met for all three tracks, such as approval by three-fourths of the popularly elected municipal and provincial councils, a referendum by the people, and a constitutionally specified waiting period of five years.¹⁷ In Spain, regions on the slower tracks learned valuable lessons from the experiences of those on the fast track.

Policy Lesson: Authority should be transferred to individual regions, municipalities or schools only after they meet specific tests of readiness, such as financial participation, training, or community involvement—rather than decentralizing all areas simultaneously, regardless of readiness.

Q. How do policy makers deal with regional differentiation under decentralization?

A. Under any system, regional differences in schooling will occur. However, these differences can be especially problematic under decentralization. Disparities between wealthy and poor regions frequently lead to dramatic differences in teacher salaries, per-pupil expenditures, instructional materials, and maintenance of physical facilities.¹⁸ In various Latin American nations, regions developed curricular programs so different from one another that moving from one region to another was not unlike moving from one country to another. Moreover, Spain and Argentina lost their capacity to gather and reproduce nationwide educational statistics for several years because, among other things, each region began collecting statistics at different times in different formats, and the ministries were unable to aggregate them.

Several countries have adopted mechanisms to prevent significant educational differences from developing between regions. Spain, for example, vigorously pursues educational decentralization within its "one nation" concept, which emphasizes that there is one Spain and one educational system, both of which are composed of 17 decentralized parts (autonomous communities). A clear policy delineates the division of responsibility and authority between the nation and the regions, and both sides are vigilant that the other does not overreach its authority.

In addition, the Ministry of Education established and maintains "minimum requirements" that govern the time, academic content, and administrative processes associated with national concerns, such as Spanish history, the Spanish language, mathematics, and science. The 17 autonomous communities retain a specific amount of time during the school day to pursue their own academic programs reflecting regional concerns and local issues, such as regional languages, history, and culture.

Spain has one final integrating tool; only the Ministry of Education can grant diplomas for schools and teacher training institutions throughout the nation. Even though a school, province, or autonomous community may not wish to follow national educational policy, the threat of withholding diplomas is a powerful motivating force.¹⁹

To facilitate the integration of its decentralized educational system, Argentina has created the Federal Education Council (Consejo Federal de Educación). The Council is composed of all the provincial ministers of education plus the national Minister of Education, who is the chair. The Council defines key education policy for the country. However, provincial compliance with that policy is voluntary.²⁰

In Colombia, if any region does not follow national educational policy, the Ministry of Education is authorized to cease making the monthly co-financing payments that support that region's educational system. To alleviate disparities in educational funding between regions, Colombia passed a special tax law in 1971, called the *Situado Fiscal*. Through an economic redistribution formula based on population and relative regional wealth, Colombia has made a significant effort to equalize regional educational funding.²¹ In the poorer regions (departments), the national government might pay as much as 80 percent

of the educational expenses, while in the wealthier regions, the contribution might not exceed 40 percent.

The United States in recent years has developed a unique policy approach—one that facilitates system integration and articulation, while maintaining the nation's historic commitment to decentralized state and local control over education. The federal government set up the Goals 2000 program in part to address the concern that the relatively poor academic performance in math and science in the United States, when compared to other industrialized nations, has been caused partly by the disarticulation between schools, school districts, and states as to what, when, and how academic material is taught. The Goals 2000 program establishes a series of *voluntary targets and standards* on such issues as projected graduation rates, drug free schools, academic performance standards, curriculum alignment, literacy, school safety, and parent participation.²² It is hoped that the decentralized educational systems throughout the country will voluntarily agree to focus their energies on attaining these nationally defined targets and standards.

The U.S. federal government does not specify *how* any given state or school district should attempt to accomplish the centrally defined goals. However, to encourage change, the federal government has budgeted \$400 million in grants for states that submit their own reform plans that use incentives to move their school districts toward the targets specified in Goals 2000.

In Spain, probably the most powerful tool for maintaining an acceptable level of integration between the regions came from the advance preparations (ranging from studies to planning to negotiations) that took place before authority and responsibility were transferred to the regions. As little as possible was left to chance.

Only rarely do countries do the preliminary work that leads to a smooth decentralization process. Without careful pre-planning, a decentralization initiative can cause major surprises and dislocations. Witness the turbulence in Argentina following the decentralization of primary education in 1978 and secondary education in 1993.

Other countries deliberately limit such advance preparation. Nicaragua's Ministry of Education, for instance, in its current decentralization program, has maintained that "one learns to swim by swimming"—that is, the country will learn to decentralize by decentralizing. Such a strategy is called "*action learning*," and is based on the notion that if an educational system waits to reform until all the studies are completed and the plans developed, nothing ever happens because there are always more studies to do and plans to develop. In a smaller country, action learning based on continuous evaluation and mid-course corrections may be an effective strategy.

Policy Lesson: Following decentralization, the central ministry of education must possess the tools to guard against the development of significant regional differences in educational opportunity and

quality of academic programs.

Q. How long does it take to decentralize an educational system?

A. Decentralization is not created by passing a law. Rather, it must be *built* by overcoming a series of challenges at the center and the periphery by, for example, changing long-established behaviors and attitudes, developing new skills, convincing people in the center who enjoy exercising power to give it up, permitting and sometimes encouraging people to take creative risks, promoting and rewarding local initiatives, and maintaining continuity with the decentralization reform even as governments change. Frequently, educational officials who managed the centralized system tend to be less than enthusiastic about decentralization and slow down the change process.

Consequently, nations should think in terms of years rather than weeks or even months to see results. The longer time frame is particularly relevant for nations with weak regional and/or local management infrastructures. As a World Bank staff member recently observed: "the first relevant accomplishments in the Mexican and Chilean cases surfaced about five years after the decentralization process was started."²³ In Spain, educational competencies are to be transferred to the last regions in 1997 or 1998 under a decentralization program that began in 1978.

Policy Lesson: People who have had extensive managerial experience in a centralized educational system are not the best candidates to manage a decentralized system.

Q. Does decentralization increase learning?

A. Improving the quality of education is typically a key objective of decentralization. However, numerous studies have concluded that "while parents, students, and educators appear to be more satisfied under decentralization, it is still unclear whether, and under what circumstances, it makes any real difference in levels of student attainment of academic or social objectives."²⁴ Several analysts point out that there are simply too many intervening variables, such as parental attitudes, peer group support, administrative training, resource availability and teacher motivation, and this complicates measurement. Thus, direct cause (decentralization) and effect (test scores) relationships are of questionable validity. In the words of one expert: "This transfer of power provides the opportunity, but not the guarantee, for the quality of school decision making and action to benefit."²⁵

Policy Lesson: Following a decentralization initiative, the quality of education may indeed increase (or decrease) as measured by test scores. However, because of the multitude of socio-economic and organizational variables involved, it may not be possible to attribute the changes directly to the decentralization program.

PART II. DECENTRALIZED SCHOOLS

Q. What are the basic premises of decentralized schools?

A. Since the mid-1980s, the transfer of decision-making authority and responsibility from the center down to local schools has become an increasingly popular reform around the world. The basic premise behind decentralized schools is that educational decisions made at the local level are more quick, informed, flexible and responsive to specific needs than decisions made in the capital city. To paraphrase a famous African saying, the village can raise the child better than the State.

Successful decentralization reform requires at least the following four factors:

- *Deregulation.* Increased flexibility through deregulation is the key to making decentralized schools work effectively. Current national and regional (state, provincial or departmental) laws, presidential decrees, ministry policies, municipal regulations and other legal instruments tend to be cumulative, contradictory, and almost always confusing to educators over the years.²⁶ However, deregulation also holds dangers, notably the potential for local abuses of power (for example, unqualified teachers can be hired or large budget deficits incurred).
- *Semi-autonomy.* Truly autonomous schools do not exist. With deregulation comes semi-autonomy, and semi-autonomy can be used effectively only if a local plan exists to guide educational actions, actors, and processes. The existence of a local plan should be a prerequisite for the transfer of authority. At a minimum, the plan should include local goals and upgraded standards involving administrative processes, professional development, curriculum innovation and change, and local financial contributions in support of school development. The potential danger is that because of inexperience, local decision makers may substitute wishful thinking for realistic potential.
- *Local school governance and leadership.* There are two basic models of decision-making authority in a decentralized school. Under the first arrangement, authority is transferred to the school director who receives advice on decision making from an elected

school council consisting of parents, teachers, staff, and sometimes, students. Under the second model, authority is transferred to the school council. A power-sharing arrangement exists between the council and the school director, each with defined duties and responsibilities. Both models can be effective, depending on the goodwill of the participants. Strong, collaborative leadership from the school director and the council members is important. The danger of the first model is that some directors may routinely ignore the advice of the council. The second model can be problematic if the director and the council members engage in disputes over task responsibilities. The second operates more effectively if the school council concerns itself with setting overall goals and policy for the development of the school and the evaluation of its progress, but does not become involved in micro-managing day-to-day affairs. Under this second model, the school director should not try to set policy.

In all cases, if the school council or the school director violates national educational policy, the ministry of education should be entitled to intervene. In Spain, the school council elects the school director from teacher candidates who present proposals for school development. After the election, the school director and the council members work together to implement the development plan. The negative side of the Spanish model is that the teachers elected as directors must continue to teach several classes a day; they can only be reelected once, and then must return to a classroom in their own schools when their time in office is over. Along with losing valuable administrative experience, the transition of teachers from colleague to director and then back to colleague is difficult and stressful.

- *Accountability.* The decentralized schools model can be effective only if accountability accompanies the transferred authority. A danger with decentralized schools is that they will not be held accountable for anything, even if they do not meet their own goals and minimum standards, or those of the region or of the nation. A second danger is that a radical element in the community may take over the school council to insert its own ideological agenda.

Q. What innovative approaches to local school decentralization are underway in the United States?

A. Four relatively recent, nontraditional models of decentralized schools are becoming increasingly popular in the United States and may be transferrable to other academic communities in the Americas. They are:

(1) *Schools with school-improvement committees.* In the 1980s, many states passed legislation empowering local public elementary and secondary schools to create school-improvement committees, usually composed of 10 to 15 elected parents, teachers, and students (at the high school level). Typically, these committees are charged with evaluating the strengths of the school and making decisions about where the limited

budget should be spent (for instance, on school beautification, instructional materials, or professional development). The school-improvement funds come from various sources, including local donations; special fund-raising activities, such as student car washes, garage sales, or newspaper drives; the school and school district budget traditionally allocated to these activities; or a portion of a state's lottery earnings (where such lotteries exist).

(2) *School "choice."* In the United States, parents traditionally have been obligated to send their children to the schools closest to their home. In recent years, however, a forceful argument has emerged that public schools with a guaranteed student population and government funding (state or local) attached to each student have no clear incentives to improve. In the 1980s, public opinion and state legislation began to shift toward permitting parents to send their children to the public school of their choice. According to theory, the parents' choice will put to work a *market mechanism* that will reward the better public schools with more students and funding and force low quality schools to improve or go out of business.²⁷

However, after pursuing a school choice option, no state in the United States has recorded major shifts (more than 15 percent) in student population away from the public school nearest home. There are various reasons why. Most "choice" programs are contingent upon schools not already being overcrowded. Yet overcrowding is common in the United States and even more so in Latin America, where double shifts are typical. Obviously, overcrowded schools have no room for new students. Also, parents often want their children close to home. Moreover, for many families, the cost of transportation can be prohibitive. The parents who have taken advantage of the "choice" programs tend to be those who are better educated and informed, more assertive, and relatively more affluent.²⁸

(3) *Charter schools.* The most rapidly expanding educational reform in the United States today is the charter school movement.²⁹ The term "charter" comes from the contracts that were given to early European explorers. In some ways the shift is similar to the "autonomous schools" movement emerging in some Latin American countries, and could have wide application throughout the region. In the United States, each state develops its own charter school legislation, but several common themes have emerged.

- *Choice.* Charter schools are market-driven public schools of choice (with the characteristics discussed in the previous section). Thus, neither students nor teachers are obligated to participate.
- *Sponsorship and supervision.* States typically require charter schools to have a publicly accountable sponsoring and supervising agency, such as a university, community college, school district or city council.³⁰
- *Accountability.* With deregulation comes accountability. If the charter school does not fulfill its obligations (such as reaching educational goals, achieving minimum scores on standardized tests, or practicing transparent accounting principles), the sponsoring agency

or state government can revoke the authorizing charter. The sponsoring agency also must account for the effectiveness of its supervision practices.

- *Initiation, location, and size.* Charter schools can be initiated by interested qualifying groups, such as teachers, business officials, parents, or concerned citizens. The charter schools can be located almost anywhere, including empty stores or private homes. The most common approach is to take over an existing school building when a sufficient number of teachers and parents agree. Size is not a factor. In California, charter schools range from 24 students to more than 1,400. Charter schools are deregulated and governed by their own elected council.

- *Program of Study.* While charter schools are usually not obligated to follow the official curriculum framework of their state, many choose to do so. However, others develop a special program emphasis, such as literature-based reading, African-American culture, technical math, science and computer training, basic reading and writing skills, or focus on populations with specific needs (including potential drop-outs, pregnant teens or students with discipline problems). In the United States, the Constitution prohibits organizing a public school around religion, but in many nations, this might be a theme.

- *Financing.* Charter schools are public schools, and the government's per-pupil allocation accompanies each student who enrolls in one. Any special state funding, such as monies for students with disabilities or from low-income families, also follows the student.

Even though the charter school movement is new to the United States, some emerging patterns are encouraging—and surprising. For example, parent demand for charter schools far exceeds the authorized supply; many charter schools have been organized around "at-risk" or special need students (not just affluent students, as originally feared); many ethnic and minority families are enrolling their children in charter schools (up to 40 percent in one six-state area); and they can be found in every type of neighborhood (rich and poor, rural and urban), in every type of building.

Major problems can also accompany charter schools. The schools must be run with the efficiency of a small business and acquire, often through subcontracts, business and legal services for which educators are not trained. Charter schools demand an extraordinary amount of time and energy from educators and community participants. The schools can be the source of intense conflict within the governing bodies of schools as state guidelines are removed and individuals assert their own visions about the course and content of the new school.³¹ Unfortunately, it is not yet clear whether charter schools increase levels of learning.³²

(4) *Vouchers for public or private schools.* Educational vouchers are government per-pupil financial subsidies that parents can spend in public or private schools of their choice. The rationale is that as *schools compete for students* in order to survive and prosper financially, the quality of education will be enhanced. In the United States, voucher programs are extremely controversial. To date, only two cities—Milwaukee and

Cleveland—have initiated experiments, and these are limited to a few thousand students from low-income families.³³

Chile has implemented the most extensive voucher program in the Western Hemisphere.³⁴ In the early 1980s the public schools, including buildings, teachers, and administrative personnel, were transferred to the control of municipalities or private corporations. A per-pupil financial subsidy was given to students, who then selected a private school (but only one that did not charge any tuition) or a municipal school to attend.

This municipalization of education took place under a military government that provided minimal planning, virtually no public participation, no experimentation, and minimal municipal infrastructure to support the decentralization process. Nevertheless, during the first decade of the experiment, the market force of parent choice resulted in a doubling of market-share enrollment in private (non-tuition charging) elementary schools, from 14 percent to 31.3 percent, and in private (non-tuition charging) academic secondary schools, from 10.3 percent to 31.7 percent.³⁵

While the privatization program in Chile has had successes in changing the enrollment patterns of many students, there are continuing concerns that the market mechanism has not served the lower income groups well because "they are deprived of information and school alternatives to make appropriate decisions."³⁶ Also, as Winkler and Rounds point out, because the "Chile reforms occurred in a setting that did not permit political opposition, they are unlikely to be easily replicated in other countries."³⁷ It should be noted, however, that the privatization model in Chile continued with the return of democratic government in 1990—and continues today.

Q. What innovative forms of decentralization exist within the school building?

A. At least two interesting decentralization experiments within school buildings in the United States may be of interest in Latin America.

(1) *Educational academies.* An educational academy (sometimes called a school-within-a-school) is designed to respond to large secondary schools that have become bureaucratic, insensitive and impersonal to student and community needs. These schools are broken up into two or three smaller schools that share the same building. As much as possible, the smaller schools are separated by rooms, floors or artificial walls. Each academy has decentralized authority as well as its own teaching staff, goals, student clubs, parent groups and curriculum emphasis, such as technology, arts, humanities, or math and science. Each academy also receives a block grant budget and makes decisions about how to distribute funding. However, some facilities must be shared, such as the library and expensive equipment. This can cause scheduling problems.

(2) *Teacher teams.* A second decentralization reform seeks to address a different problem. Each year, students encounter different teachers with distinct teaching styles

and emphasis. Meanwhile, teachers receive a new cohort of students every year and have little knowledge about their special needs, abilities, and levels of learning. In experimental public schools in Cincinnati, Ohio, teachers are formed into teams that stay with the same group of students for two or three years. Each teacher team receives a block grant to fund its program, as well as decentralized authority to establish goals, curriculum guidelines, expectations for learning, and measures of accountability. Problems can arise from this approach if teachers are not well trained or motivated and a cohort of students must stay with them for an extended period of time.

CONCLUDING THOUGHTS

As a process of delivering educational services in a democratic country, decentralization as a power-sharing device makes good sense. In a democratic system, the educational process should belong to society and not the state. Consequently, strong, determined, and focused leadership must come from both the top down and the bottom up. Leaders must present opportunities and not simply problems that are transferred from one level to another. An effective decentralization initiative requires several elements: collaborative and comprehensive advanced planning, followed by a spirit of experimentation, a willingness to be flexible and take risks, and the persistence to pursue reform in the long-term.

The greatest barriers to reform are usually more political than technical or even financial—although there are certainly relationships among them. All too often, a decentralization reform is identified with a particular political party, individual, institution, or other center of power, making it difficult to generate broad and sustained support.

In the final analysis, the question that must be asked is whether decentralization improves the delivery of services and the quality of education. Unfortunately, decentralization efforts do not guarantee these outcomes. What is evident is that through decentralization, the conditions for some type of change have been put into place. What happens afterward depends upon the type of leadership, goodwill, and collaboration that rise to the challenge.

Appendix A contains principles intended to provide policy makers with insights to facilitate the decentralization process; these principles are based on international experience. Additional readings on decentralization are listed in Appendix B.

ENDNOTES

¹ E. Mark Hanson, "Decentralization and Regionalization in the Ministry of Education: The Case of Venezuela," International Review of Education 22, no. 2 (1976): 155-76.

- ² Kurt Thurmaier and Pawel Swianiewicz, "Primary School Decentralization in Poland: Nurturing the Roots of Democracy," In Depth 5, no. 2 (1995-96): 1-22.
- ³ Silvia Novick de Senén González, "Una nueva agenda para la descentralización educativa," Revista de Educación 4 (1994): 11-27.
- ⁴ Manuel de Puelles Benítez, "Educación y autonomía en el modelo Español de descentralización," Revista de Educación, no. 309 (1996): 163-93.
- ⁵ Hans Weiler, "Control Versus Legitimation: The Politics of Ambivalence," in Decentralization and School Improvement, J. Hannaway and M. Carnoy, eds. (San Francisco, CA: Jossey-Bass, 1993), pp. 55-83.
- ⁶ E. Mark Hanson, "Democratization and Decentralization in Colombian Education," Comparative Education Review 39, no. 1(1995): 100-119.
- ⁷ E. Mark Hanson and Carolyn Ulrich, "Democracy, Decentralization and School-Based Management in Spain," La Educación 27, no. 2 (1992): 132-51.
- ⁸ Ernesto Schiefelbein, "Restructuring Education through Economic Competition: The Case of Chile," Journal of Educational Administration 29, no. 4 (1991): 17-29.
- ⁹ Regina Cortina, "Education and Political Change in Mexico," paper presented at the CIES Conference, Boston, March of 1995, p. 10; Noel McGinn and Susan Street, "Educational Decentralization: Weak State or Strong State?" Comparative Education Review 30 (1986): 471-90.
- ¹⁰ Regina Cortina, "The Politics of Education Reform in Latin America," paper presented at the Working Group on Reforming Education in Latin America, Council on Foreign Relations, New York, NY, May 15, 1996, p. 13.
- ¹¹ Juan Carlos Navarro, "La descentralización de la educación en Venezuela," Seminario Internacional: Ventajas y Riesgos de la Descentralización en las Reformas Educativas, Managua, Nicaragua (Julio de 1996).
- ¹² Human Resources Operation Division, Argentina: Decentralization and Improvement of Secondary Education Project (Washington, DC: The World Bank, 1994), p. 8.
- ¹³ Mark Walsh, "Privatization Found To Fall Short of Billing," Education Week 16, no. 10 (November 6, 1996): 1.
- ¹⁴ Donald R. Winkler and Taryn Rounds, Municipal and Private Sector Response to Decentralization and School Choice (Washington, DC: The World Bank, 1993).
- ¹⁵ Silvia Novick de Senén González, "Una nueva agenda..." p. 17.

¹⁶ Hanson, "Democratization and Decentralization."

¹⁷ Spanish Constitution, Arts. 143 and 151.

¹⁸ The classic example in a decentralized system is the United States, where the average teacher salary in the state of New York exceeds \$45,000, while in Oklahoma, it averages \$26,000. The cost of living, however, is higher in New York.

¹⁹ E. Mark Hanson, "Education, Administrative Development, and Democracy in Spain," International Journal of Educational Development 9, no. 2 (1989): 127-38.

²⁰ Many educational leaders would like to see the educational policy formed by the Council become obligatory for the provinces.

²¹ E. Mark Hanson, Educational Reform and Administrative Development (Stanford, CA: Hoover Institution Press of Stanford University, 1986).

²² National Education Goals Panel, The National Education Goals Report: Building a Nation of Learners (Washington, DC, September, 1994).

²³ Juan Prawda, "Educational Decentralization in Latin America: Lessons Learned," International Journal of Educational Development 13, no. 3 (1993): 262.

²⁴ D. J. Brown, "Decentralization in Educational Government and Management," The International Encyclopedia of Education, 2nd ed. (London: Pergamon Press, 1994), p. 1410.

²⁵ Fenton Sharpe, "Towards a Research Paradigm on Devolution," Journal of Educational Administration 34 (1996): 7.

²⁶ In the United States, for example, the state of California has an education code that fills 11 volumes and approximately 6,000 pages.

²⁷ J. E. Chubb and T. M. Moe, Politics, Markets, and American Schools (Washington, DC: Brookings Institution, 1990).

²⁸ Valerie Martinez, K. Thomas, and F. Kemerer, "Who Chooses and Why: A Look at Five School Choice Plans," Phi Delta Kappan (May 1994): 678-81.

²⁹ The charter schools movement is a decentralization strategy that began five years ago with one school in one state. Today, 25 states have passed authorizing legislation and there are several hundred charter schools in operation. James Goenner, "Charter Schools: The Revitalization of Public Education," Phi Delta Kappan (September 1996): 32-40.

³⁰ In Minnesota, of the 43 operating charter schools, 33 were sponsored by universities.

³¹ Joe Nathan, "Possibilities, Problems, and Progress: Early Lessons from the Charter Movement," Phi Delta Kappan (September 1996): 18-31.

³² Linda Jacobson, "Under the Microscope: As Charter Schools Flourish, the Big Question for Researchers Is: Do they Work?" Education Week (November 6, 1996): p. 21.

³³ There are at least three major barriers to wide spread implementation of voucher programs: the Constitutional barrier to using public funds to support religious private schools, the organized opposition of teachers' unions, and a national sentiment that democracy is transmitted through public education.

³⁴ The decentralization/municipalization reform in Chile is interesting and controversial in terms of what has happened and why. Unfortunately, only a broad outline of the issues can be treated here.

³⁵ Ernesto Schiefelbein, "Restructuring Education."

³⁶ Juan Prawda, "Educational Decentralization in Latin America," p. 262.

³⁷ Donald R. Winkler and Taryn Rounds, Municipal and Private Sector Response, p. 17.

Appendix A

WHAT WORKS: LESSONS FROM INTERNATIONAL EXPERIENCE IN EDUCATIONAL DECENTRALIZATION

Make-or-break Considerations

- The more a decentralization initiative involves transferring positive opportunities to the regions/ municipalities rather than problems and burdens, the greater the chances for success.
- Major educational reforms tend to live or die based on political considerations, rather than technical or financial ones.

Sharing a Vision

- The greater the shared vision of decentralization among the distinct centers of power, the greater the chance for successful change.

Planning for change

- Most decentralization reforms are initiated with very little previous study and a minimal amount of planning. An organization and management analysis should be conducted early to determine where in the educational system specific responsibility and authority should be assigned, and no such assignment should be made unless the essential support, such as financing and technical training, exists to carry out decisions.

Choosing Effective Strategies

- The best decentralization plans are simple and clear.
- A successful decentralization initiative requires strong and trained leaders who have sufficient job stability to carry out a well-designed plan.
- An educational system must simultaneously support some centralized and some decentralized decision making, depending on the types of decisions and actions involved.
- Devolution of authority, rather than delegation, has a better chance for long-term success because it provides for continuity in the change process.
- Authority should be transferred to individual regions, municipalities or schools only after they meet specific tests of readiness -- rather than to all areas simultaneously, regardless of readiness.

Negotiating Change

- National/regional/municipal power-sharing arrangements are more effective when the terms of transfer are negotiated rather than imposed.

Sharing Benefits and Opportunities

- The government and the teachers union(s) can be allies in the decentralization process if both institutions benefit from the reform.

Guarding Against Regional Disparities

- Following decentralization, the Ministry of Education must possess the tools to protect against significant regional differences that may develop in educational opportunity and quality.

Promoting Local Initiative

- Local initiative is significantly reduced when total educational funding is dependent on the central government's budget.
- When regional or local governments are investing their own resources, they tend to take greater care in how the money is spent.

Providing Sound Management

- The stronger the administrative infrastructure at the regional levels, the greater the opportunity for success.
- People who have had extensive managerial experience in a centralized system are not the best candidates to manage a decentralized system.
- Decentralization usually strengthens the central ministry by relieving it of the multitude of tasks that can best be carried out at lower levels.

Improving Educational Quality: The Bottom Line

- Under decentralization, the quality of education may increase or decrease as measured by test scores. It may not be possible to attribute the changes directly to decentralization reform because of the numerous socio-economic and organizational variables involved.

Appendix B

ADDITIONAL READINGS

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