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ABSTRACT

The purpose of this paper is to provide a theoretical and experiential background for a better approach to the question "What are the learning needs in management training for personnel working at the management level within ministries of education?" The paper reviews the literature on management training for personnel working in educational systems, with some specific consideration of ministries of education central offices, and Latin American educational management issues. Through a bibliographic essay, the following issues are dealt with: the nature of the managerial function, the humanistic trend in management, contemporary educational issues influencing the managerial function, the management development process, the learning needs of educational managers, appropriate training methods for management development, and issues in the management of Latin American educational systems. It is suggested that the educational systems undertake action research to address these issues, using the ideas expressed in this paper as an underlying foundation. (DCS)

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MANAGEMENT TRAINING IN EDUCATIONAL SYSTEMS

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Paper prepared for the Vth World Congress of Comparative Education
World Council of Comparative Education Societies,
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CONTENTS

	Pages
Introduction.....	1
1. The Managerial Function.....	3
2. The Humanistic Trend in Management.....	6
Management by Objectives.....	9
Organization Development.....	10
Performance Improvement Programming.....	11
3. Educational Issues Influencing Management.....	13
4. Management Training and Development.....	15
5. Learning Needs of Educational Mangers.....	19
6. Training Methods for Managers.....	23
7. Some Issues in the Mangement of Latin American Educational Systems.....	26
8. Summary, Conclusions and Suggestions.....	29
Bibliography.....	31

MANAGEMENT TRAINING IN EDUCATIONAL SYSTEMS

By: Víctor M. Valle, Ed.D.*

Introduction

The success of the central offices of public educational systems (i.e. ministries of education) depends largely upon the adequacy and quality of the managerial personnel. Such personnel needs continuous training in the appropriate skills and knowledge to perform the managerial function.

Ministries of education in Latin America have given evidence during recent years of increasing concern about management training programs for their personnel. Efforts to deal with this concern have been relatively scarce.

In spite of the efforts made to upgrade the managerial capabilities within the educational systems, more research and action are needed to identify the most common managerial problems faced by ministries of education and to determine the appropriate content and arrangements needed for management training programs within Latin American ministries of education.

Studies made during the last decade indicate that the training for management is a dimension of training that has been neglected within educational systems. This has led to problems at the ministry level as well since ministry leaders are drawn from the ranks of public sector administration and teachers: For instance, a recent study sponsored by the World Bank states that "because the content of education is continually reassessed, monitoring curricular innovations is as important as evaluating the performance of teachers. Second, management policy and procedures should be formulated in such a way that educational administrators at various levels become important participants in, rather than dispensers of decisions. Third, educational personnel at central and local levels need training in management."¹ However, in terms of in-service teacher training, as discussed by Owen, "...little is done

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¹ Wadi D. Haddad, et al., Education. Sector Policy Paper, (Washington, D.C.: The World Bank, 1980) p. 56

about the organization of change and little seems to be done...to show that education in any of its aspects requests management."²

In 1975, UNESCO and several worldwide teachers' organizations held a conference on education. Official documents released by the conference stated that "teacher training centres should cater also to personnel who are not strictly responsible for teaching, but whose educational role is considerable, such as administrative and supervisory staff."³

Another well-known international organization, the Organization for Economic Co-operation and Development (OECD), in 1971 published a book on teacher training which said: "So far training the managers of the (educational) system is an aspect which appears to have been neglected. While the cost and effort of developing and (sic) educational system makes it essential that steps be taken in this direction, the forward-looking teacher moreover must be able to rely on these various types of managerial staff for support and encouragement."⁴

In sum the facts that describe the current issues in management training for educational systems are: (a) the increasing concern for management training programs, and (b) the frequent statements of international organizations involved in national development projects that the human resources in ministries of education need training in management.

This paper is intended to review the relevant literature of management training for personnel working in educational systems, specifically central offices of ministries of education, in Latin American countries.

This paper develops a bibliographic essay which deals with issues as: the nature of the managerial function and the humanistic trend in management; contemporary educational issues interacting with the managerial function; and, the management development process, the learning needs of educational managers and the appropriate training methods for management development. Some references will be made to previous studies dealing with common characteristics of Latin American educational administrations.

2 J. G. Owen, The Management of Curriculum Development, (Great Britain: Cambridge University Press, 1937) p. 116

3 "The Teacher's Role and Training Joint Paper from the International Teachers Organizations" for the International Conference on Education, Palais des Nations, Geneva, August 27 - September 4, 1975, p. 15

4 Organization for Economic Co-operation and Development, Training, Recruitment and Utilization of Teachers in Primary and Secondary Education, (France: OECD, 1971) p. 471

1. The Managerial Function

In common terms, dictionaries (i.e. Webster's) define management as "the judicious use of means to accomplish an end." In technical terms, there are classic functions associated with management. Christoph Reichard considers management to be "...more exactly characterized by its four basic functions: planning organization, control and leadership."⁵ According to Reichard "...a manager has a series of material functions to fulfill (setting the decision-making process in motion, setting the goals, providing information, making decisions, putting them into effect, co-ordination and control). At one and the same time, he (or she) has a series of personnel oriented leadership functions to fulfill (influencing those led in the direction of goal attainment, the welfare and promotion of employees)."⁶

There is a famous acronym coined by Luther Gulick in 1937 which represents a model expressing more functions of management than other models proposed. The acronym -- POSDCORB -- summarizes the seven major functions of management and expresses the traditional view of managerial functions. The seven functions are: Planning, Organizing, Staffing, Directing, Co-ordinating, Reporting, and Budgeting.⁷

In spite of the almost four decades existing between the cited references, they have some similarities; both of them include planning and organizing, as major functions of management. The human dimension of management -- motivating and leading subordinates -- is approached by Gulick's POSDCORB in the Staffing and Directing functions, while Reichard does it by including the leadership functions. The control function included by Reichard is contained in the POSDCORB model within the Budgeting function.

Even though the POSDCORB model is almost 50 years old, it is still a worthy tool to characterize the managerial function. Consequently, it is

5 Christoph Reichard, "The Lesson of Experience in Applying Management by Objectives to Public Enterprises. A German Perspective." Germany Foundation for International Development and East African Management Institute, Improving Performance in Public Enterprise, (Tanzania: Tanzania Litho Ltd., 1976) p. 70

6 "Ibid.

7 Luther Gulick, "Notes on the Theory of Organization," in Luther Gulick and Lyndall Urwick (eds.), Papers on the Science of Administration, (USA: Institute of Public Administration, 1937) p. 13

relevant to define each of the functions expressed in the famous mnemonic POSDCORB, as explained recently by Gerald Zaltman.⁸

- Planning is a future-oriented function of management by which expected organizational outcomes and appropriate methods are outlined in the pursuit of organizational objectives. Planning is an important managerial function; that is the reason most authors put it as number one among the functions of management.

- Organizing is the arrangement of the various units or subdivisions of the organization in order to establish a formal structure of authority. This managerial function is a crucial one to organizational effectiveness, it demands differentiation, specialization and integration of the several individuals working within the organization.

- Staffing is the function of hiring, maintaining, developing (training and motivating) and firing employees. Through this function managers define and describe the jobs under their responsibility and evaluate potential candidates to hold positions.

- Directing implies making decisions and transforming them into orders to be implemented by subordinates. The directing function demands that managers take time to collect the relevant data, process the necessary information and delegate work.

- Co-ordinating means the linking and interrelation of various managerial responsibilities into a meaningful whole.

- Reporting is keeping both superior and subordinates informed on what is going on in relation to the job position held by the manager. Good reporting means both getting and giving all the relevant information from and to all employees concerned.

- Budgeting is the function related to the acquisition of financial resources to pay for the things the organization needs to work. For managers, good budgeting is an excellent control and feedback instrument.

POSDCORB is still considered by those concerned people -- academicians and practitioners -- a valid model to describe the managerial functions. According to Gerald Zaltman⁹ "a group of 38 managers in the 1978 executive MBA Program at the Graduate School of Business, University of Pittsburgh, were polled concerning the nature of their jobs and time they spent in the various management functions," as prescribed by POSDCORB. Percentages of time that line managers in the survey indicated in each of the PODCORB functions are summarized below.

⁸ Gerald Zaltman (Ed.), Management Principales for Non-profit Agencies and Organizations, (USA: American Management Association, 1979), passim.

⁹ Ibid, p. 16

Function	Percentage of time allocated
- planning	16
- organizing	12
- staffing	9
- directing	18
- coordinating	22
- reporting	9
- budgeting	4
- other	10
<hr/>	
TOTAL	100

This reference surfaces two facts: first, POSDCORB is still a useable framework of management functions; and, second, planning, directing, and coordinating are the most time-consuming functions for managers.

It has been seen above how the nature of managerial work has always interested many scholars and practitioners. In more practical terms, Henry Mintzberg has, during the last decade, experimented and written on the nature of managerial work -- on what managers actually do. In a study using observation of five chief executives he found that the managerial job is plagued by interruptions and fragmentation and, the manager's job lacks reflection and planning. The study, observing five executives found:

1. Almost 4/5 of their time was spent in oral communication.
2. Forty-nine of their activities lasted less than nine minutes, and only 10 percent lasted longer than 60 minutes.¹⁰

10 Henry Mintzberg, The Nature of Managerial Work, (New York: Harper & Row, 1973) "Appendix C: A Study of the Work of the Chief Executives" pp. 230-277

2. The Humanistic Trend in Management

James Wilson states that "management as a process, profession, and function was born in the commercial sector."¹¹ However, the concept has increasingly received acceptance within the non-profit and public organizations.¹² It can be argued that in management issues there has been a search for the individual and a humanistic trend.

Indeed, during the last decades important changes have occurred in the philosophy of managing organizations and consequently new managerial tools have appeared. Human needs have been taken into account by managers; collaboration and reason have replaced coercion and fear within the organization.¹³

Academicians and practitioners have been concerned with the search for the individual and towards more humanistic and participatory approaches in the management of organizations. Those changes impelled the invention of managerial tools which have reinforced the participatory and humanistic trend in organizations, for instance Management by Objectives,¹⁴ Organization Development,¹⁵ Process Consultation,¹⁶ and Performance Improvement Programming.¹⁷ Warren Bennis,¹⁸ Peter

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- 11 James A. Wilson, "Management of Mental Health in Non-profit Organization," in Gerald Zaltman, op.cit., pp. 120-153
- 12 Gerald Zaltman, op.cit., passim.
- 13 Warren G. Bennis, "Changing Organizations," The Journal of Applied Behavioral Sciences, Volume 2, Number 3, 1966, pp. 247-263.
- 14 George S. Odiorne, Management by Objectives: A System of Managerial Leadership, (USA: Pitman, 1965) passim.
- 15 Robert A. Zawacki and D.D. Warrick, Organization Development: Managing in the Public Sector, (USA: International Personnel Management Association, 1976), passim.
- 16 Edgar Schein, Process Consultation: Its Role in Organization Development, (USA: Addison-Wesley Publishing Company, 1969), passim.
- 17 United Nations, Practical Guide for Improving the Performance of Public Organizations by Programming, (USA: Department of Economic and Social Affairs of the United Nations Organization, 1978), passim.
- 18 Warren G. Bennis, Organization Development: Its Nature, Origins Prospects, (USA: Addison-Wesley Publishing Company, 1969), passim.

Drucker,¹⁹ Douglas McGregor,²⁰ and Abraham Maslow,²¹ among others have provided the needed theory and the relevant tools to make possible the existence of more humanistic organizations.

At the beginning of the present century, Frederick W. Taylor believed that "...under scientific management the initiative of the workmen -- that is, their hardwork, their good will, their ingenuity -- is obtained practically with absolute regularity."²² If this theory were accepted, then men could be manipulated and assembled like pieces of huge machines in order to obtain outputs.

After "scientific management" some voices dedicated themselves to caring about the individual within the organization. Mary Parker Follet began to use psychological language to analyze organizational matters; she said: "...Psychology, as well as our own observation, shows us not only that you cannot get people to do things most satisfactorily by ordering them or exhorting them; but also that even reasoning with them, even convincing them intellectually, may not be enough."²³

Abraham Maslow²⁴ provided valuable insights about human motivation and basic human needs. Maslow said that there is a hierarchy of needs which is a source of motivation for individuals; within such a hierarchy individuals move up or down as each level of the hierarchy is satisfied or threatened. According to Maslow "there are at least five sets of goals which we may call basic needs. These are briefly psychological, safety, love, esteem and self-actualization. In addition, we are motivated by the desire to achieve or maintain the various conditions upon which these satisfactions rest and by certain more intellectual desires."²⁵

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- 19 Peter F. Drucker, The Practice of Management, (USA: Harper & Row, 1954), passim.
- 20 Douglas McGregor, The Professional Manager, (USA: McGraw-Hill 1967), passim.
- 21 Abraham H. Maslow, "A Theory of Human Motivation," Psychological Review, Vol. 50 (July 1943) pp. 370-396
- 22 Testimony before the U.S. House of Representatives, January 25, 1912, cited by Jay M. Schafritz and Albert C. Hyde, Classics of Public Administration, (USA: Moore Publishing Company, Inc., 1978) p. 17
- 23 Henry C. Metcalf and L. Urwick, Dynamic Administration. The Collected Papers of Mary Parker Follet, (USA: Harper and Brothers Publishing, 1942) p. 17
- 24 Abraham H. Maslow, op.cit, 1943
- 25 Ibid.

Douglas M. McGregor worked to find and explain the human side of enterprises. According to his theories X and Y, a new theory of management was needed, a management "...based on more adequate assumptions about human nature and human motivation."²⁶ McGregor suggested that people are not passive or resistant to organizational needs and that "...the essential task of management is to arrange organizational conditions and methods of operation so that people can achieve their own goals best by directing their own efforts toward organizational objectives."²⁷

In this way, organizations were becoming influenced by psychologists who intended to emphasize the human factor in organizational performance and management. More humanistic approaches to organizational change were accepted by academicians and practitioners. Authors began to talk not only about "concern for production" but also about "concern for people" and the combination of both generated "the managerial grid" which allowed managers to assess themselves, their managerial styles and take steps to become more people oriented. Human interactions began to be considered a crucial issue in organizational management. Robert R. Blake and Jane S. Mouton -- who invented the "managerial grid" -- stated that "...the human interaction property of the organization exists because the persons manning it must of necessity interact. They must exchange information, implement decisions made, and coordinate their efforts."²⁸

The important changes that have occurred during the last decades in the philosophy of organizational management may be summarized citing Warren G. Bennis, who expressed what he called new concepts in management;

- "1. A new concept of man, based on increased knowledge of his complex and shifting needs, which replaces the over-simplified, innocent push-bottom idea of man.
2. A new concept of power, based on collaboration and reason, which replaces a model of power based on coercion and fear.
3. A new concept of organizational values, based on humanistic-democratic ideals, which replaces the depersonalized mechanistic value system of bureaucracy."²⁹

26 Douglas McGregor, Leadership and Motivation, (USA: The Massachusetts Institute of Technology Press, 1966) p. 15

27 Ibid.

28 Robert R. Blake and Jane S. Mouton, "Grid Organization Development" Personnel Administration, January-February 1967, Volume 30, Number 1, pp. 6-14

29 Bennis, "Changing Organizations", op.cit., p. 255

Those convictions impelled the invention of managerial tools which have reinforced the participatory trend in organizations. This participatory trend has helped to make management more humanistic. Several new approaches have been seen on this road: Management by Objectives (MBO), Organization Development (OD), Management Information System (MIS), Process Consultation, Performance Improvement Programming (PIP), and others.

Educational systems have become concerned with the new managerial tools. MBO, OD, MIS, PIP, are now part of the jargon of educational managers. For the purposes of this review some management techniques will be described: Management by Objectives, Organization Development, Performance Improvement Programming.

According to Peter F. Drucker "By the mid-20's, Alfred P. Sloan, Jr., of General Motors used the term 'Management by Objectives and Self-control' systematically and with real conceptual clarity."³⁰ Peter Drucker was one of the first persons to write about management by objectives in 1954; in the 1950's Drucker was concerned with self-control, team efforts, individual commitment to organizational goals.³¹

Management by Objectives

Management by Objectives has been defined by George Odiorne as "...a management process whereby the supervisor and the subordinate, operating under a clear definition of the common goals and priorities of the organization established by top management, jointly identify the individual's major areas of responsibilities in terms of the result expected of him or her, and use these measures as guides for operating the unit and assessing the contribution of each of its members."³² William C. Giecold considers that the key words in the Odiorne's definition of MBO are: process, clear definition of goals, priorities, top management, joint areas of responsibility, results expected, measures, and contributions.³³

30 Peter F. Drucker, "What Results Should you Expect? A Users' Guide to MBO," Public Administration Review, Vol. 36 (January/February 1976) pp. 12-19

31 Peter F. Drucker, The Practice of Management, op.cit., passim.

32 George S. Odiorne, Management by Objectives: A System of Managerial Leadership, (USA: Pitman, 1965) pp. 55-56

33 William C. Giecold, Management by Objectives: A Self Instructional Approach, (USA: McGraw-Hill, Inc., 1978) pp. 3-5

Management by Objectives has become a process by which organizational objectives are determined via participation of members in terms of measurable outcomes expected; and based on the belief that human beings are able to practice self-control. Jong S. Jun believes that through the participative process, organizations increase their effectiveness, since individual and organizational objectives are meaningfully developed, responsibilities are clarified, collaboration supervisor-subordinate is enhanced; and administrative feedback is improved.³⁴

The decade of the 1950's was a very encouraging period for new managerial tools which enhanced participatory management; three years after Peter Drucker launched his "management by objectives" manifesto in 1954, the late Douglas McGregor was implementing a program of creative and planned change using behavioral sciences knowledge at Union Carbide;³⁵ such a program is considered by Zawacki and Warrick the basis and the starting point for the management tool which later has become known as Organization Development.³⁶

Organization Development

Organization Development uses change agents and behavioral sciences knowledge to induce organizational change and according to Warner Burke it provides "human and non-exploitative treatment of people in organizations."³⁷ It is a process of planned change which enables organizations to adapt effectively to the demands of the environment. Golembiewski and Eddy state that Organization Development as managerial tool includes techniques for working with groups and systems: group dynamics, t-group, and consulting skills.³⁸

By adopting Organization Development organizations seek to increase openness of communications and the level of trust and support among organizational members. Wendell L. French specifies that the typical objectives of Organization Development are the following:

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- 34 Jong S. Jun, "Management by Objectives in the Public Sector," Public Administration Review, January/February 1976, pp.3
- 35 Douglas McGregor, The Professional Manager, (USA: McGraw-Hill, 1967) pp. 106-110
- 36 Robert A. Zawacki and D.D. Warrick, Organization Development: Managing in the Public Sector, (USA: International Personnel Management Association, 1976) p. 3
- 37 Warner Burke, "A Comparison of Management Development and Organization Development," Journal of Applied Behavioral Sciences, Volume 7, 1971, p. 576
- 38 Robert T. Golembiewski and Williams B. Eddy, (eds.), Organizational Development in Public Administration. Part 1 (USA: Marcel Dekker, Inc., 1978) p. 5

"To increase the level of trust and support among organizational members.

To increase the incidence of confrontation or organizational problems under the rug.

To supplement the authority associated with the role or status with the authority of knowledge and competency.

To increase openness of communication.

To increase the sense of ownership or organizational objectives throughout the work team.

To increase the level of self and group responsibility in planning and implementation.

To create an open problem-solving climate throughout the organization that finds synergistic solutions to problems with greater frequency."³⁹

Performance Improvement Programming

In recent years, a new term has been coined: Performance Improvement Programming. This concept has been developed to be used within public administration organizations and, indeed, although it is a new term it is based on integrated applications of Organization Behavior, Organization Development, Process Consultation, and Management by Objectives.⁴⁰

This tool may be considered another step toward the humanistic approach in management since it provides a systematic approach for participation of everybody in solving organizational problems. The efforts to improve are not imposed from the top through autocratic means; neither are such efforts applied in isolation or in a vacuum; they are defined within a general framework of participation. Moreover, the Performance Improvement Programming approach facilitates management by objectives and leads to the elimination of tight controls over day-to-day decisions.

Perhaps, Performance Improvement Programming is making possible what Harland Cleveland foresaw not so long ago when he said that in the future organizations will increasingly have the following conditions: (a) loose control; (b) diffused power; (c) pluralistic, consensual, collegial and consultative decision-making.⁴¹

39 Wendell L. French, "Organization Development: Objectives, Assumptions and Strategies," California Management Review, Vol. 12, 1969, p. 23.

40 United Nations, Practical Guide for Improving the Performance of Public Organizations by Programming (USA: Department of Economic and Social Affairs of the United Nations Organization, 1978), passim

41 Harland Cleveland, The Future Executive: A Guide for Tomorrow's Managers, (USA: Harper & Row Publishers, 1972) pp. 46-47

In short, the participative and humanistic trend in management has been enhanced during the last decades; Management by Objectives, Organization Development, Process Consultation, Performance Improvement Programming are all members of the family of techniques that move toward more participation and more humanistic organizations where problems are solved taking into account human needs.

Given the nature of the affairs for which they have responsibility, ministries of education are in good position to adopt or adapt humanistic and participative approaches among their managers.

3. Educational Issues Influencing Management

In spite of the fact that management techniques have been born in the private business realm and under the auspices of big corporations -- where the main objective and the raison d'etre are the financial return on the investment -- there is an interaction between educational issues and management techniques. All the behavioral approaches that study and implement management have a strong relationship to and similarities with educational matters.

Organization Development, as it has been said, was invented within big business. The Union Carbide experience of Douglas McGregor -- starting point of Organization Development -- was really an "...educational strategy intended to change the beliefs, attitudes, values, and structure of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself."⁴² Organization Development is indeed an educational strategy that is designed and implemented to make possible a planned organizational change.

When managers are leading and persuading people they are using educational techniques. According to the guidelines proposed by Management by Objectives handbooks, when a supervisor and his or her subordinate meet to set or discuss objectives or to review the performance, the manner in which the meeting is carried out resembles a modern educational experience where the supervisor is a university professor and the subordinate is a graduate student writing a research proposal or preparing a dissertation.⁴³

There are some irreversible and universal trends in education that affect managerial practices and their training issues and needs: (a) the lifelong education concept has won wide acceptance; and (b) non-educational institutions are increasingly involved in training and educational affairs.⁴⁴

42 Warren G. Bennis, Organization Development: Its Nature, Origins, Prospects, (USA: Addison-Wesley Publishing Company, 1979) p. 2

43 William C. Giecold, Management by Objectives. A Self Instructional Approach, Volume II. Objectives Setting and the MBO Process, (USA: McGraw-Hill Book Company, 1978) pp. 1-20

44 Edgar Faure. et al., Learning to Be, (France: UNESCO, 1972), passim

The decade of the 1970's was a productive period for reinforcing the lifelong education concept. The idea that education can occur in school and outside of school won acceptance; and the belief that education can and must occur all through life won increasingly wide recognition. Edgar Faure et al., stated that "Lifelong education thereby becomes the instrument and expression of a circular relationship comprising all the forms, expressions and moments of the educative act."⁴⁶

In the same vein, the Carnegie Commission on Higher Education was studying "the totality of post-secondary education" in light of the lifelong learning concept; they -- inspired by Robert Hutchins, who late in the 1960's had written on the learning society -- released in 1973 a report and recommendation on "alternate channels to life, work, and service" and provided ideas "toward a learning society."⁴⁷

Simultaneously, the College Entrance Examination Board and the Educational Testing Service sponsored the establishment of the Commission on Non-Traditional Study under the Chairmanship of Samuel B. Gould who, associated with others (during the 1970's), edited well-known books discussing full educational opportunities and new educational arrangements in terms of structure, method, content and procedures for creating educational flexibility that takes into account the work experience of individuals, the expanded educational role of institutions other than school, and individualized learning needs.⁴⁸

If managers of educational systems and ministries of education are to develop modern management techniques, they must be aware of the importance of lifelong education and of the great possibilities involved in educational strategies as means for improving the managerial functions.

45 Ibid, p. 143

46 Ibid, p. 182

47 Carnegie Commission on Higher Education, Towards a Learning Society, (USA: McGraw-Hill, 1973)

48 Commission on Non-Traditional Study, Diversity by Design, (USA: Jossey-Bass Inc., Publishers, 1972) and Samuel B. Gould and Patricia Cross (eds.), Explorations in Non-Traditional Study, (USA: Jossey-Bass Inc., Publishers, 1972)

4. Management Training and Development

According to James A. Craft "...training represents the implementation of a strategy to change the behavior of employees to better meet organizational objectives and enhance individual movement along defined career paths. Training also provides for employee participation in the organizational development process."⁴⁹ Ruth Salinger has stated that training is composed of "...those planned and highly structured activities designed primarily to achieve specific behavior outcomes based on pre-specified performance objectives. The activities take place within a specific time frame."⁵⁰

The human resources that are needed by the organization, the administrative procedures to obtain such resources, the organizational means to handle personnel matters and to train employees are part of an effective personnel system. This is the reason Marvin J. Levine has for stating that "training and development are essential elements of an effective public personnel system. A well-planned and executed training and career development can help to improve the quality of the public service and serve as a strong recruitment incentive for high-potential personnel."⁵¹

Training, very often, is associated with specific skills for specific jobs. It is regarded by most employees as a means for upgrading in their careers. For managers their own training is seen as a way to become more efficient and effective managers. This is the reason Klinger has concluded that "training is a systematic and planned effort to increase employees' job related skills. Employees view it as a reward for high performance, a break from routine job duties, or a means of learning skills that will hasten a move to a more desirable position. Managers view it as a means of improving work unit productivity by increasing output or reducing costs. Personnel managers regard it as a visible sign of their organizational impact."⁵²

49 James A. Craft, "Managing Human Resources," in Gerald Zaltman (ed.), Management Principles for Non-Profit Agencies and Organizations, (USA: American Management Association, 1979) p. 111

50 Ruth Salinger, Disincentives to Effective Employee Training and Development, (USA: U.S. Civil Service Commission, Bureau of Training, 1973) p. 31

51 Marvin J. Levine, Public Personnel Management, (USA: Brighton Publishing Company, 1980) p. 217

52 Donald E. Klinger, Public Personnel Management, Contexts and Strategies, (USA: Prentice-Hall, Inc., 1980) p. 244

When, in addition to improving individual performance within the organization, there is a systematic effort oriented to promote managerial personnel, then one might refer to management development process. Christoph Reichard asserts that management development includes all organizational activities improving, qualifying and promoting the members of an organization, especially managers.⁵³ Management development, as part of a system of personnel within an organization which includes manpower planning, personnel recruitment, and personnel management, might be designed using educational approaches. Any training design is indeed an educational design. Reichard, for instance considers that the most decisive issues within the training concept inside an organization should be carried out under a systematic approach starting with a determination of real training needs and proceeding with planning of training contents and methods; selection of homogeneous participants; realization of the actual training program; follow-up measures; and finally, evaluation and control that close the cycle to feed again the new determination of real training needs.⁵⁴

Ministries of education are in a good position to use educational strategies to organize their management training. It seems timely for a review of some design models for management training programming to be undertaken, provided they are taken from the training and human resources development realm. Within these kind of approaches and models for designing management training, the process of determining learning needs is a crucial point.

Several authors have proposed models for designing education and training programs intended to train adults; all of these authors acknowledge that in management training the central issue is, in fact, a matter of upgrading specific skills and knowledge of adults. Malcolm S. Knowles, ⁵⁵ who is a pioneer author in "Andragogy", the learning of adults, has proposed a model where the facilitator prepares in advance a set of procedures intended to involve trainees in a process containing these elements:

- (1) establishing a climate conducive to learning and training;
- (2) creating a mechanism for mutual planning;
- (3) making a diagnostic for learning needs;
- (4) formulating program objectives;

53 Christoph Reichard, "Training of Modern Management Techniques for the Public Sectorian Overview out of the German Perspective," Paper presented to the Seminar on New Approaches to Developing Managers for Public Enterprises, West Berlin, 1978, passim.

54 Ibid.

55 Malcolm S. Knowles, The Adult Learner: a Neglected Species, (USA: Gulf Publishing Company, 1973), passim.

- (5) designing the learning experiences and preparing materials;
- (6) conducting the learning experiences using appropriate techniques and materials;
- (7) evaluating the learning results and based on that evaluation making a new diagnosis of learning needs.

The Knowles model is a process model which permits an open and flexible design for people-oriented activities that use feedback as an important element. Knowles assumes that adult trainees know that what they want to learn; they learn better when they are involved in the planning of their own training and that for adults learning and acquiring skills for self-directed learning is more important than the simple acquisition of information.

William R. Tracey has also formulated a model for designing training and development systems. Tracey's model proposed the system approach to develop training programs. It consists of fifteen steps grouped in three categories. Those three categories are (a) establishing system requirements; (b) the development of the system; and (c) the validation of the system.

To establish the requirements for the training program (or training system), Tracey suggests five steps: first, identifying training and development needs; second, collecting and analyzing job or task data; third, selecting and writing training objectives; fourth, constructing evaluative instruments; and, finally, constructing criterion measures.

For the program development (or system development), Tracey proposed five steps: first, selecting and sequencing program content; second, selecting and using training strategies, third, selecting training aids; fourth determining equipment requirements; and fifth, producing training documents.

To obtain the validation of the program (system validation) William Tracey has proposed another five steps; selecting instructors, selecting trainees, evaluating the training program; administering and analyzing criterion measures; and follow-up on trainees who have completed the training program.⁵⁶ In this model the whole process starts in the training and development needs of the expected trainees.

Cyril O. Houle designed a model that consists of seven key points of decisions arranged in a sequence in which the last point feeds back to the first one.⁵⁷

56 William R. Tracey, Designing Training and Development Systems, (USA: American Management Association, 1971), passim

57 Cyril O. Houle, The Design of Education, (USA: Jossey-Bass, Inc., 1972) passim

The decisions are: (1) a possible educational activity is identified; (2) a decision is made to proceed; (3) objectives are identified and refined; (4) a suitable format is designed; (5) the format is fitted into larger patterns; (6) the plan is put into effect; and (7) the results are measured and appraised.

Actually, the Houle's model is an education model arranged in a logical sequence that is helpful to design a broad range of education and training activities. In this model the first point, a possible educational activity is identified, is centered around interests and needs of future learners. After that it is assumed the legitimacy of the decision to proceed.

Leonard Nadler has described what he calls critical events to develop training programs. Nadler's model, or critical events model, starts with the needs of both individuals and the organization. It consists of seven "critical events" which are constantly interacting with an evaluation and feedback procedure. The emphasis of this model is the kind or type of job that must be done by trainees after they receive their training; therefore, the starting point (first critical event) refers to what an employee should do in a specific job; it is the critical event to specify job behaviors; the other six events are: identifying needs, determining objectives, building curriculum, selecting methods and materials, obtaining instructional resources, and conducting the training programs.⁵⁸

Nadler says that if the other critical events have been carried out with suitable attention and diligence, then the conducting of the program is quasi-automatic. Nadler's model gives major importance to evaluation and feedback and after the conducting of a training program it considers a loop back to needs of the organization and needs of individuals within the organization.

The mentioned models are some of those that might be applied to design training activities for managers. In any case, the core of each of them is the determining of learning needs of potential trainees. Another common denominator in those models is the importance that each of them places on evaluation and feedback procedures. It follows, that one of the models, like those referred in this review or some sort of combination of two or more of them, may be useful in designing management training for ministries of education.

58 Leonard Nadler, "Using Critical Events to Develop Training Programmes," Industrial Training International, April 1971, pp. 52-56; May 1971, pp. 57-61

5. Learning Needs of Educational Managers

Educational managers have roles, activities, and functions that are continually challenged by changes in the environment, organization and management techniques. Such changes generate learning needs in management. Common definitions of "need" refer to "something lacking" or "a deficiency." Hammons suggests that a need is related to "discrepancy." "... which simply indicates a difference between what is and what is desired."⁵⁹ Therefore, if ministries of education desire knowledgeable and skillful managers, then they have learning needs. They must satisfy education and training needs to achieve their ends.

Malcolm S. Knowles considers that for adults, like managers, "... an educational need...is something people ought to learn for their own good, for the good of an organization, or for the good of society. It is the gap between their present level of competencies and higher level required for effective performance as defined by themselves, their organization, or society."⁶⁰

One way of knowing learning needs of managers is to analyze the functions and roles they perform in their own organizations. Other source for identifying learning needs of managers is composed by the individuals who perform managerial functions within any organization and by those individuals' immediate supervisors. As Knowles, based upon his theory and practice, has stated "most individuals are aware of some of their needs for further development."⁶¹

According to Christoph Reichard, management has two dimensions, the non-personal and material dimension, and the personal or behavioral dimensions. Each of them has characteristic functions which in turn generate learning needs.⁶² Reichard considers that the non-personal dimension of management demands training in decision-making process, formulation of goals and objectives, processing of information, planning and control. The behavioral dimension requires training in control, communication, motivation and handling of personnel.

59 James Hammons, et al., Staff Development in the Community Colleges: A Handbook, (USA: ERIC, 1978) p. 26

60 Malcolm S. Knowles, The Modern Practice of Adult Education - Revised and Updated, (USA: Follett Publishing Company, 1980) p. 88

61 Ibid., p. 93

62 Christoph Reichard, op.cit., passim

As cited before in this report (see footnote Nro. 11) management techniques have been invented in the business enterprises of the private sector of developed societies; in Latin American countries ministries of education are part of the public sector and most of their managers are professional educators. Gerald Zaltman asserts that "educators are often criticized for being among the most conservative professional groups in the face of change",⁶³ and according to classic conceptualizations in the field, training is essentially a process to change employees, via educational techniques "...to further efficient operation and mission accomplishment (of organizations)."⁶⁴

Moreover, it must be recalled, the public sector, where most of the educational management occurs in developing countries, has certain peculiarities that must be taken into account, especially because, as it has been said above management techniques have been born in the private sector. Public management is characterized in the internal situation, by a complexity of goals; little autonomy in definition of goals; conflicting problems between political and administrative systems; rigid organizational and decision-making structures, heavy dependence on legal norms rules and by-laws. On the external side, public management, and ministries of education are part of public sector, is characterized by its involvement with social problems, dependence on the political system; strong political influence and public control, lack of competitive pressure.⁶⁵ Management techniques might be adopted and adapted to handle the major managerial functions. Based on that conclusion Aaron Elkins has suggested some topics to include in a short-term training program for managers.⁶⁶

- Communications
- Leadership styles
- Organization climate
- Motivation
- Performance evaluation
- Grievance handling
- Discipline
- Job definition
- Objective setting

63 Zaltman, op.cit., p. 29

64 United States Civil Service Commission, Assessing and Reporting Training Needs and Progress, Personnel Methods: Series No. 3, (USA: Government Printing Office, 1956) p. cited by Knowles, The Modern Practice...p. 97

65 Christoph Reichard, op.cit., passim.

66 Aaron Elkins, "Some Views on Management Training," Personnel Journal, June 1977, pp. 305-306-311

Henry Mintzberg suggests eight basic sets of managerial skills that might be taught in long term management training programs.⁶⁷ They are:

- Peer skills that deal with the manager's ability to enter into and effectively maintain peer relationships; the game theory is useful to train managers in this set of skills.
- Leadership skills focus on the manager's ability to deal with his or her subordinates, to motivate and train them; participative training is the best tool to improve these skills.
- Conflict-resolution skills to mediate between conflicting individuals and handle disturbances; role playing is suggested for the necessary training.
- Information-processing skills to build informal information networks, find sources of information and extract what they need, validate information, assimilate it and how to disseminate information, express their ideas effectively, and speak formally as representatives of organizations. Management Information Systems and communications techniques are the appropriate subjects to train managers in this set of skills.
- Skills in decision-making to act under ambiguity and in unstructured situations. Linear Programming, queueing theory, and Operations Research are relevant subjects for training in these skills.
- Resource-allocation skills to choose among competing resource demands (time and organizational resources); in-basket training is suggested to upgrade this necessary skill.
- Entrepreneurial skills involve the search for problems and opportunities and the controlled implementation of change in organizations; Organization Development and Management by Objectives are suggested to train in these skills.
- Skills of introspection to thoroughly understand his or her job; in this case learning by doing and self-directed approaches might be the best thing to do.
- Finally, in considering learning needs for trainees seeking to improve their managerial capabilities, basic human needs must be taken into account. A management development program must consider the basic human needs. According to the mentioned, classic, and

67 Henry Mintzberg, The Nature of Managerial Work, (USA: Harper & Publishers, 1973) pp. 188-193

ever present theory of motivation stated in the 1940's by Abraham N. Maslow,⁶⁸ there are five sets of basic human needs. These are physiological, safety, love esteem, and self-actualization. People are motivated by the desire to achieve or maintain such basic needs. Maslow says that "these basic goals are related to each other, being arranged in a hierarchy of prepotency. This means that the most prepotent goal will monopolize consciousness and will tend of itself to organize the recruitment of the various capacities of the organism. The less prepotent needs are minimized, even forgotten or denied. But when a need is fairly well satisfied, the next prepotent ("higher") need emerges, in turn to dominate the conscious life and to serve as the center of organization of behavior, since gratified needs are not active motivators.⁶⁹

68 Abraham H. Maslow, "A Theory of Human Motivation," Psychological Review, Vol. 50 (July 1943) pp. 370-396

69 Ibid.

6. Training Methods for Managers

U.S. Civil Service experts have suggested several training techniques and methods for managers. According to them,⁷⁰ there are four categories of training techniques and methods: (a) group discussion, including conference, forum, symposium, workshop; they are used as alternatives to traditional classroom training and when the purpose is to encourage participants to exchange experiences and information; (b) group participation, including case study, brainstorming, in-basket, exercises, role-playing, managerial games, and laboratory training; they are intended to intensify participation and are used, especially, to train in Organizational Development and interpersonal communications; (c) information presentation techniques, including lecture, slide/tape presentation, instructional film, instructional television; they are one-way methods; and (d) individual development methods, including individual development plans, correspondence study, self-paced instruction, job rotation, coaching, planned experiences; this category of methods includes experiences that allow participants to undertake their own pace of training and outside of the classroom.

The methods for training managers must be based on the characteristics of adults, especially adults with higher education. Malcolm S. Knowles⁷¹ asserts that mature persons are able to self-direct their own training; that adults prefer to determine their own training needs, to define their learning objectives and to implement their own training programs. Adults have a self-esteem different from children's; adults prefer to participate in training programs where their previous experience is respected and considered a fundamental pivot for the training. As James Hammons has stated, "adults learn what and when they want -- normally based on an individual feeling of need due to a current problem."⁷²

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- 70 Interagency Advisory Group Committee on Development and Training, Managerial and Supervisory Training Techniques and Methods, (USA: U.S. Civil Service Commission, 1977), passim.
- 71 Malcolm S. Knowles, The Adult Learner: A Neglected Species, (USA: Gulf Publishing Company, 1973), passim.
- 72 James Hammons, et al., op.cit., p. 16

In the last two decades many innovative training methods have been invented, due to the influence of technology; the development of the behavioral sciences, especially Psychology; and the changes occurred in organizational management which increasingly uses participative approaches (i.e. Organization Development, Planned Change, Management by Objectives, Process Consultation). The programmed instruction, the closed circuit of educational television, the computer assisted instruction, the case method, the small group discussion, the correspondence study have gone into the training programs.

Schnelle and Soltz have suggested that in management training "one of the criteria for judging learning methods is whether these methods motivate people to learn, whether they enable people not just to 'take in' the knowledge offered, but also to think about it and to utilise it for their own purposes."⁷³ Methods which reduce the trainee to a passive receiver or which only permit reactive behavior do not meet the above mentioned criteria. Moreover, the investment of time and the necessary resources to prepare the training is another consideration in judging learning methods. Schnelle and Stoltz suggest a way to classify training methods based on two dimensions: (a) investment in preparation (relatively high, medium, relatively low); and (b) type of behavior the method produces among trainees (passive, reactive, interactive). See Table 1 as follows:

73 Wolfgang Schnelle and Inga Stoltz, International Learning, A Guide to Moderating Groups of Learners, (West Berlin: Metaplan, 1977)
p. 5

TABLE 1

Classification of Training Methods

TYPE OF BEHAVIOR	PASSIVE	REACTIVE	INTERACTIVE
INVESTMENT IN PREPARATION			
RELATIVELY HIGH	Film	Computer-Assisted Instruction	Games
MEDIUM	Textbook	Programmed Instruction	Case studies
RELATIVELY LOW	Lecture	Lesson- Conversation	Interactional Learning

Based on the classification of methods suggested by them, Schnelle and Stol: believe that "films, textbooks and lectures lead to passive learning behavior. The learners remain mute, they are condemned to listening and watching. Programmed instruction does provide, in principle, for reactions from the learner after each new input of information: he takes a box or repeats a word he just acquired. What is expected of him (or her), however is a pre-determined action. He enters it on a form or he pushes the button of a teaching machine. Questions are not possible or, if they are, they are limited to what was pre-programmed. Once he (or she) runs out of enthusiasm, there is nobody around, teacher or fellow learner, to encourage him (or her) to continue."⁷⁴ It might be added that the case method allows a dynamic group interaction and the use of several teaching techniques during the training process, but it needs a lot of time and resources to prepare the case and the trainer.

A method, or combination of methods, recommended for training management personnel is the so-called interactional method, which is based not on the reaction of individuals to a learning experience, but on the interaction among individuals who meet in small groups to learn around a concrete, specific, and common problem which affects their job performance.

74 Ibid, p. 6

7. Some Issues in the Management of Latin American Educational Systems

Arizmendi et al., considered, among others, two facts that affect management of educational systems in Latin America:⁷⁵ first, the enormous growth experienced in Latin American public educational systems during the last two decades has increased the needs for managerial capability in headquarters of ministries of education; second, the "new services" that have appeared during the same period within the organizational structure of ministries of education -- for instance educational technology, teacher's welfare, educational T.V., non-formal education, special education. Together these realities make the need for upgraded functions of management even more critical. These new units and divisions need planning, organizing, control and leadership.

In general, in Latin American countries the educational policies are set up by the Central Government and implemented through the Ministries of Education. Thus, the government agency responsible for managing the national education systems is the Ministry of Education or the Secretariat of Education.

Despite some differences among Latin American countries "...the centralization of the power and decision-making in the ministry of education is the major characteristic of the educational administration in Latin American countries."⁷⁶ However, recent studies state that in Third-World countries "the trend toward centralization is now being challenged on the grounds that ministries of education have become overburdened with daily administration of educational logistics -- often at the expense of their policy-making functions."⁷⁷ Such a trend of de-centralization implies new needs in management.

For managing the educational system, the typical organizational structure of Latin American ministries of education includes: (a) the top level composed of the minister and his or her immediate entourage; (b) staff council or councils integrated by outstanding personalities within the country; (c) planning unit; (d) functional divisions at a national level and coverage (i.e. general directorates of supervision, teaching, elementary education, secondary education, etc.); and, (e) supporting fields.⁷⁸

75 Octavio Arizmendi Posada et al., "Panorama General de la Administración de la Educación en América Latina," Educación Hoy, Año VI, Marzo-abril 1976, Número 32, pp. 4-6

76 Octavio Arizmendi, et al., op.cit., p. 13

77 Wadi D. Haddad, et al., op.cit., p. 55

78 Octavio Arizmendi, op.cit., pp. 13-16

The last two decades, Latin American systems have experienced unprecedented expansions. This has placed heavy demands on educational management at the ministry level. Between 1970 and 1977, the total school enrollment (all levels included) went from 55 million to 78.7 million. That means an increase of 43 percent in seven years and an average annual growth of enrollment of approximately 6 percent.⁷⁹ Such a "student boom" happened while the average annual growth of the total population was 2.6 percent in the same period.⁸⁰ In other words, the rate of growth of school population was more than twice the rate of growth of the total population.

Another trait in Latin American educational systems during the last two decades has been the appearance of new services in the organizational structure of ministries of education due to the diversification of opportunities that are being offered, for instance, educational television, teachers' welfare, lifelong education, special education, continuing education, educational technology, data processing. Those new services, or at least some of them are units that place management demands of a new nature.⁸¹

Another important matter that imposes demands on the management of ministries of education is the fact that "... the ministry of education is often the largest employer in a (Third World) country, with financial resources it commands usually representing 3 percent to 5 percent of more of the gross national product."⁸² The handling of thousands of teachers, employees, and classrooms scattered across a country demands good management.

For many years and more firmly since the 1950's, there has been among Latin American educational policy-makers great concern about the management of educational systems and their main head-offices, the ministries of education. When the Latin American Ministers of Education met in 1956, they recommended to the Governments the undertaking of studies about the administrative organizations within the ministries and the training of the needed managerial personnel.⁸³ In 1958, an

79 Comité Interamericano de Educación, Informe Final XXV Reunión Ordinaria, (Washington, D.C.: Organización de los Estados Americanos, 1980) p. 5

80 Inter-American Development Bank, Economic and Social Progress in Latin America, 1980-1981 Report, (Washington, D.C.: Inter-American Development Bank, 1981) p. 395

81 Octavio Arizmendi, op.cit., p. 6

82 Wadi D. Haddad, op.cit., p. 53.

83 Organización de los Estados Americanos, La Educación, Nro. 53-55, Washington, D.C., 1970

Inter-American Seminar on Comprehensive Educational Planning for Latin American countries made recommendations oriented towards improving educational management.⁸⁴ In 1963, the Ministers of Education met in Colombia, and then, they agreed to carry out relevant research studies and to adopt the needed measures in order to improve the administration of educational services.⁸⁵ In 1964, Carlos Correa published an article about the administration of educational systems in Latin America. In the Article, Correa proposed an urgent in-service training program for educational managers.⁸⁶ Again and again in 1966, in 1968, in 1971 and so forth, Ministers of Education have met to study educational problems and every time, they have insisted of the need to improve educational management.⁸⁷

Some efforts have been made; however, the above-mentioned recent study and that was sponsored by the World Bank, that dealt with the nature and scope of educational management issues in Third World countries, including the Latin American ones says that despite efforts to cope with new demands on educational systems, "...the development of national managerial, administrative, and analytic capacities lags behind the growth in size and complexity of the educational enterprise. Some programs of educational development suffer because of poor management."⁸⁸

Ministries of education in leading educational systems in Latin American countries need the development of managerial capacity in order to cope with the complex and challenging problems that they face.

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- 84 Organización de los Estados Americanos, La Educación, Nro. 49-50, Washington, D.C., 1970
- 85 Unión Panamericana, Tercera Reunión Interamericana de Ministros de Educación, Acta Final, Washington, D.C., 1963
- 86 Carlos Correa Máscaro, "La Administración de la Educación en América Latina," La Educación, Nro. 33, enero-marzo, 1964, pp. 83-103
- 87 Consejo Interamericano para la Educación, la Ciencia y la Cultura, Proyecto: Estudios de Base. (Recolección de Datos), (USA: Organización de los Estados Americanos). passim.
- 88 Wadi D. Haddad, op.cit; p. 53

8. Summary, Conclusions, and Suggestions

The present paper has been undertaken to support both theoretically and experientially the major issues involved in the learning needs in management training for personnel working at the managerial levels with ministries of education. The managerial function was reviewed from classic and modern authors, i.e. Gulick, Minstzberg, and Zaltman. The "humanistic trend" in management was reviewed and some of the educational issues influencing management practice were mentioned. Warren G. Bennis, Abraham H. Maslow, Douglas McGregor, Peter Drucker, George Odiorne and other authors were discussed and their major contributions to the field were cited, for instance, Planned Change, human needs, theory of motivation, Organization Development, Management by Objectives and other related trends and issues.

After that, educational management issues in Latin America were reviewed: centralization, the typical organizational structure of ministries of education, the unprecedented expansion of Latin American educational systems, the new type of services that have appeared in ministries of education, and the impact on the labor market generated by ministries of education.

Working definitions on management training and development made by practitioners and academicians have been examined. After those definitions, some design models for management training programming were briefly described; they were taken from the training and human resources development realm.

To emphasize the nature of the topic under study, learning needs of educational managers were discussed in light of the relevant roles and functions of managers and based on subjects that accordingly might be taught in management programs to improve the performance of the managers.

Since subjects need to be taught through appropriate methods the relevant training methods for managers were discussed. Basically, the suggested methods are in line with adults' characteristics and the modern practices of human resources development.

After reading this paper those concerned with solving management training problems in educational systems will have a better understanding on how to approach the training of educational managers. There will be more means to answer a general question that is listened all over the world: what are the learning needs in management training for personnel working at the managerial level within ministries of education?

Finally, a broad suggestion is made. Educational systems should undertake action-research in order to address specific questions as:

1. What are the most common problems faced by managers while they perform their functions at ministries of education?

2. What are the current learning needs in management training of personnel at the middle-level management working at the ministries of education?
3. What methods of delivery are most relevant for providing managerial development opportunities to those persons?
4. In short, what are the current learning needs of educational managers as perceived by them and their supervisors?

This paper has intended to provide underlying ideas to pursue answers to such questions.

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