

THE OVERSEAS EDUCATION OF AMERICAN  
ELEMENTARY AND SECONDARY SCHOOL  
PUPILS WITH APPLICATION FOR  
AMERICAN SPONSORED SCHOOLS OVERSEAS:  
A DIAGNOSIS AND PLAN FOR ACTION

Thesis for the Degree of Ph. D.  
MICHIGAN STATE UNIVERSITY  
ERNEST NUNCIO MANNINO  
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THE OVERSEAS EDUCATION OF AMERICAN ELEMENTARY  
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DIAGNOSIS AND PLAN FOR ACTION

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Major professor

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## ABSTRACT

### THE OVERSEAS EDUCATION OF AMERICAN ELEMENTARY AND SECONDARY SCHOOL PUPILS WITH APPLICATION FOR AMERICAN SPONSORED SCHOOLS OVERSEAS: A DIAGNOSIS AND PLAN FOR ACTION

By

Ernest Nuncio Mannino

American-sponsored, bi-cultural schools overseas have been studied extensively since 1950. Their needs for financial and technical assistance have been documented. In recent years, numerous governmental and privately-sponsored aid programs have been established for these schools. The results of these programs are mixed. Today, the 128 overseas schools of concern in this thesis continue to operate essentially as autonomous enterprises, individually deficient in major areas of service, and collectively non-responsive to the basic educational needs and requirements of American elementary and secondary school children overseas.

The overseas school situation poses four basic challenges for those institutions and agencies in the United States that purport to assist the schools. These challenges are:

1. To equalize educational services among the diverse schools so that the quality of educational opportunities available to American pupils overseas will not differ markedly by place of the pupil's overseas residence.
2. To normalize the fiscal capability of the diverse schools so that the quality of educational services available to pupils will not differ materially among the schools by reason of cost of services or wealth of school supporters.
3. To equalize the educational performance of overseas American pupils with those of comparable pupils in the United States.
4. To build the capability within each school to renew its basic instructional programs and services on a timely basis, both as an educational and as a bi-cultural institution.

This thesis--building upon the results of numerous earlier studies and modern management principles and experience--outlines a program of action to meet these challenges, first by proposing concrete ways to create a functional and viable "system" of schools overseas, and second by proposing specific ways to build the personnel and program capability of each institution therein. Specifically a plan is developed whose key provisions are:



1. A program of financial aid to enable each participating institution to provide a minimum acceptable program of educational services, appropriate to the needs and requirements of overseas American pupils.
2. A formula for distributing such financial aid that compensates schools inversely in proportion to their fiscal ability to support such a minimum program of educational services.
3. A program that brings the substantive resources of United States public and higher education to bear on the personnel and instructional program development requirements of the overseas schools, through a system of regional centers and satellite cooperating schools.
4. A new partnership between government and United States business and industrial corporations, through a quasi-public foundation that provides the financing and oversight needed to implement the proposed plans and proposal.

The elements of the proposed action plans are examined in the light of current possibilities and probabilities. Alternatives to full plan implementation are considered.

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Ernest Nuncio Mannino

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I am indebted to Dr. Karl Hereford, who gave generously of his time and talent and whose intimate knowledge of overseas education particularly in South America proved to be of invaluable assistance.

A debt is also due Carlton Bentz who provided professional guidance in the analysis of data and to Dr. Don Leu for his technical guidance in the early stages of developing this dissertation.

Finally, a special debt of gratitude to my lovely wife, Lucille, whose encouragement and understanding gave me the desire and will to complete this work.

Chapter

I. INTRODUCTION

II. THE PROBLEM



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## CHAPTER I

### INTRODUCTION

Nearly one-quarter of a million American pupils attend elementary or secondary schools overseas. Were these pupils grouped into a single administrative unit, the school system so formed would number among the four or five largest systems in the United States.

However, schools for American pupils overseas are dispersed in seventy-four countries on five continents. They were established to provide full time educational programs for children of those United States citizens who are connected with the Nation's overseas military or other governmental installations, business and industrial enterprises, and various professional or related associations.

Most of these schools are administered by the United States Department of Defense (DOD). Approximately 165,000 dependent children are enrolled in schools operated by the United States military overseas. Another 60,000 United States pupils are enrolled in private schools, the majority of which are community-owned and operated. An additional 8,000 United States pupils attend schools operated by

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Many of these schools are underdeveloped and are in need of support. The quality of their services rarely is comparable to that found in the Nation's better public or private schools. Working conditions for teachers often fall below accepted standards. Curricula may be inferior or underdeveloped, and instructional systems, media, and materials often are obsolete. In 1967-68, such conditions among overseas DOD schools, for example, led to the levying of formal sanctions against the Department of Defense by the National Education Association. Accreditation of private schools for American pupils overseas also lags behind that of domestic schools in the United States. Most overseas schools for Americans are unable or unwilling to meet minimum accreditation standards established for elementary and secondary schools by United States accrediting agencies.

It does not follow, however, that these American children necessarily have to have their educational opportunities limited because their parents are assigned--or accept assignments--overseas. Indeed, the American pupil overseas--much as the migrant pupil in the continental United States--presents a special challenge to the United States educational community to assure him no less an opportunity for quality education than is available generally in the American public schools.

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For the past decade, there have been many attempts to improve the quality of education available to American pupils overseas. New private schools have been established where none existed before. The Federal Government has established grants-in-aid<sup>1</sup> programs to help many of these schools. Business and industrial corporations with overseas branches have contributed significantly. Various United States educational institutions also have provided technical assistance and in-service teacher training to overseas schools. Nevertheless, the basic conditions of the overseas schools continues to be substandard in many respects. Great variations in quality may be observed. Indeed, the American pupil's place of residence overseas most often determines the nature and extent of his educational opportunity.

#### Review of the Literature

Overseas educational programs for United States elementary and secondary pupils have been studied extensively since 1960. In large measure these studies have been descriptive analyses, primarily in the form of case studies of schools located in the Southern portion of the Western Hemisphere. Vaughan<sup>2</sup> and Beans<sup>3</sup> described within a historical perspective the development of specific American-sponsored schools, namely the schools in Guatemala City, Guatemala and Sao Paulo, Brazil. The cultural implications of the American-sponsored schools in Latin America and the means of utilizing the schools as vehicles for better understanding

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were the focal points of Young's study.<sup>4</sup> Two major reports by Bartlett<sup>5</sup> cited major deficiencies in the DOD schools. Cole<sup>6</sup> in 1964 examined American-sponsored schools in the Near East, South Asia, East Asia, and in Europe. He reported great variance in the quality of programs between schools of different countries, and among schools within the same country. In 1964, Orr<sup>7</sup> studied the programs of American-sponsored schools of Latin America. He reported that less than one-third of these schools offered a curriculum that would compare favorably with those in typical schools of the United States. Patterson<sup>8</sup> studied the largest and oldest of the American-sponsored overseas schools. Despite the introduction of modern instructional methods, he reported, little had been accomplished there by 1960 toward assimilating pupils of different nationalities into a multi-cultural instructional program. Kardatzke<sup>9</sup> also reported that little had been accomplished toward assimilating the pupils of different nationalities into multi-cultural instructional programs.

The area of study that has received the greatest, although nominal, systematic attention has been the general area of administration of the American-sponsored schools. Orr's investigation in 1964 dealt with questions concerning the bi-national school's origin in Latin America, its characteristics, its objectives, its adaptations and contributions to the national education system, and its potential



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growth and change.<sup>10</sup> The deficiencies in management in a subset of American-sponsored schools in South America were identified and explored by Seaquist.<sup>11</sup> King identified the need for adequately trained and paid professionals as a critical determinant in the improvement of the overseas American-sponsored school.<sup>12</sup> Domidion concurred with King on the need for adequately trained professionals to improve instruction in the schools and in addition documented the complex difficulties faced in administering the American-sponsored school in the cross-cultural environment. She further emphasized the need for increased financial assistance to improve educational programs.<sup>13</sup>

In addition to empirical studies, survey descriptions and articles, although limited to selected geographic areas of the world, further record the urgency of improving the educational facilities for the overseas American child.

Hereford et al. surveyed American-sponsored schools in Mexico<sup>14</sup> and Horn in Central America<sup>15</sup> in 1961-62. Hereford observed great variance among those schools in all aspects of school management, curriculum, instructional practices, and program effectiveness. Rushton and Engleman<sup>16</sup> in 1969 studied representative schools in each major geographic region. They noted extensive improvements in schools since 1965; most, however, remained underfinanced and inadequately staffed. Luebke summarized characteristics of 130 American-sponsored schools overseas based on 1968-69 questionnaires completed by the schools.<sup>17</sup>

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Each of these studies contributed in part to a knowledge and understanding of the problems that confront educational institutions for American pupils overseas. Bartlett, Engleman, and Hereford, in particular, posited corrective action and recommendations for improvements. Although their reports were instrumental in triggering certain limited new developments in government and university assistance programs, there has not been any attempt made to fashion a comprehensive approach to the solution of the development problems confronting the American-sponsored schools overseas. Bjork<sup>18</sup> and Seaquest<sup>19</sup> have accentuated the importance of educational planning and model formulation, and it is this aspect, educational planning in the American-sponsored schools on a world-wide scale that will constitute a dominant theme of this thesis.

#### Statement of the Problem

The purpose of this thesis, therefore, is to delineate known conditions concerning certain overseas schools, and to advance a comprehensive management strategy for possible corrective action.

Specifically, the problem addressed by this thesis is two-fold, namely: (1) to diagnose the condition of formal education for American elementary and secondary school pupils overseas, and (2) to design, construct, and propose--consistently with that diagnosis--a concrete and comprehensive plan for corrective action which, if

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In large measure, the thesis is directed toward five sets of questions. They are:

1. What is the current status of the American-sponsored schools overseas? What are their strengths and weaknesses?
2. What are the ways that United States agencies and institutions have tried to assist these schools? How effective and efficient are these assistance programs?
3. What are the key changes, if any, that need to be made if American-sponsored schools overseas are to become effective as educational institutions?
4. How might these changes be accomplished? What could be the key elements of a plan for action to improve these schools, on a systematic basis?
5. How feasible might such a plan be? In what ways might it be implemented within the immediate future.

#### Delimitations of the Thesis

Attention is given in this thesis to the problem of improving services and program effectiveness in 128 American-sponsored schools overseas assisted by the United States Department of State (see Appendix A). Admittedly, a

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larger question might have been addressed, namely: What should be done for all schools overseas that have been established to serve United States pupils? Such determinations eventually should be made for the United States military and United States business operated schools overseas, and the proprietary and missionary-type schools as well.<sup>20</sup>

Certain practical reasons dictated the choice of the American-sponsored, overseas schools for this thesis.

1. These schools perform an important public service for United States citizens, namely: at cost, they provide a bi-cultural (or multi-cultural) instructional program for American and other pupils who reside overseas. In many of these schools, there has been a serious effort made to utilize the resources of the host nation and the educational technology of the United States in fashioning curricula and instructional programs for a multi-national student body.

2. Moreover, the schools are community-owned and operated, hence, to a degree far greater than in DOD or company-operated schools, they seriously involve parents and other community representatives in shaping the character of the school. In this respect, these schools are more "American" than missionary or proprietary schools that offer a United States-type curriculum.



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3. Already, a pattern of government and business support has been established for these schools that could be reshaped to improve program effectiveness. Although a new cooperative structure might ultimately be required through which to channel additional government and business support to these overseas schools, the rationale for such support does not have to be re-established.

4. Many of the schools now receive some financial support through a grants-in-aid program from the United States government. Certain changes in the nature of grants and in the conditions of granting might have an immediate remedial effect in some of these schools, particularly in school management.

5. Prototype technical and management assistance programs already have been established for the American-sponsored schools. Some fifty-seven American-sponsored schools maintain formal relationships for technical assistance, teacher exchange, and instructional materials development with counterpart school districts in the United States. In each year since 1957, one or more United States universities have provided management and technical assistance to selected American-sponsored schools overseas. In 1968, seven major United States universities were so engaged with forty-eight overseas schools.<sup>21</sup> Where these prototype assistance programs were seriously intensified, significant improvements in school performance were noted.<sup>22</sup>

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The basic objective with respect to new program development, therefore, is not foreign to the American-sponsored school. Although new structures may need to be invented in order to make management and technical assistance effective, the basis for such assistance already is established.

6. Only 35,000<sup>23</sup> of an estimated 250,000 United States pupils attend these American-sponsored schools overseas; nonetheless, they are representative of most of the United States pupils overseas not enrolled in DOD schools. Moreover, the schools are located in seventy-four countries. As a group they have more of a world-wide character than all other classes of overseas schools for Americans. More importantly, for purposes of a thesis, the magnitude of the development problem confronting 128 American-sponsored schools seems manageable. That is to say, significant progress might be made in attaining program improvements in 128 American-sponsored schools with relatively modest new investments. As will be advanced later, for relatively few new dollars the American-sponsored schools could become what President Johnson referred to as "showcases of excellence,"<sup>24</sup> hence potential models for emulation later by DOD and proprietary-type schools as well.

#### Importance of the Thesis Topic

Quite aside from the matter of public policy that **mandates** that each pupil in the United States--regardless **of** place of residence--should enjoy equal access to quality

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education, there are certain very practical reasons why the American pupil overseas merits special attention.

First, it is the vested interest of business and government employers in that pupil and his family. Both government and business enterprises largely are dependent upon United States administrators and technicians to staff their key overseas positions. To recruit and hold superior staff, both business and government must provide appealing and effective family services overseas, a substantial part of which is good schooling for staff dependents. The United States technician or administrator is not easily recruited for assignment to areas overseas in which schools are known to be grossly inadequate. Nor is that person's job performance likely to remain unaffected if he is concerned continually about the quality of educational services for his children.

Second, there is a certain element of national pride involved in the provision of schools for United States pupils overseas. American-sponsored schools, for example, are among the vanguard of American institutions in seventy-four host countries. When they are inadequate, as many are, they mislead host nations with respect to the nature and importance of education in United States society and culture. This point was stressed by President Johnson in his 1966 "International Health and Education Programs" message. He cited the cultural and political significance

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Finally, the overseas school prepares pupils--both American and host country nationals--who very likely will assume leadership positions in their respective countries following completion of their formal education. If the overseas school is of high quality and is exploiting the potential cross-cultural benefits of the bi-national or multi-national school, one would expect their graduates to be uniquely qualified to provide a much needed leadership for international understanding in their respective positions.<sup>25</sup>

#### Method of Thesis Development

Overseas schools that enroll American pupils already have been studied extensively, albeit unsystematically and incompletely.<sup>26</sup> It is not the purpose of this thesis to restudy these schools. Rather, it is to use the results of already conducted studies as a basis to diagnose conditions that must be corrected if American pupils in those schools are to enjoy educational programs and services commensurate with those available to them in the continental United States. Wherever feasible, results of studies of the American-sponsored overseas schools are compared with data from public and private schools in the United States. But,



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to recapitulate, it is not intended here solely to recite once again the characteristics of 128 American-sponsored overseas schools. Rather, it is to organize those known characteristics into a limited number of general conclusions, however tentative they might be, and upon those conclusions to build a plan for corrective action, including: (1) proposed objectives, (2) management strategies for achieving those objectives, and (3) proposed key actions for making the American-sponsored schools overseas into exemplary institutions.

Specifically, the thesis is developed in six sequential steps, as follows:

1. Establishing the systems requirements for overseas education of American elementary and secondary pupils;
2. Assessing the capabilities of American-sponsored schools overseas to meet these requirements;
3. Examining United States government and/or professional programs of financial and technical assistance to these schools;
4. Deriving objectives for new or modified assistance programs that are calculated to make the schools more responsive to requirements;
5. Choosing or inventing appropriate management strategies for attaining these objectives;
6. Suggesting key activities for implementing these management strategies.

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Definition of TermsEqualizing of pupil performance or achievement.--

When an educational institution provides the educational services necessary to assure pupil achievement consistent with the individuals capacity to learn.

"Bi-national schools" and "multi-national."--Schools which enroll children of two or more nationalities.

Company schools.--Schools established and operated by United States companies with overseas operations to provide education for the children of their employees.

Department of Defense Schools (DOD).--Those schools which are operated and maintained by the Department of Defense for the schooling of dependents of military personnel.

Missionary or church-related schools.--Schools established to educate the children of missionaries and/or local national children and organized by a denomination or a group of denominations.

Overseas schools.--Schools operated outside of the United States of America. Schools in Mexico, Central America, and South America are included in this classification even though they may not be strictly considered "overseas."

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Proprietary schools.--Schools organized by an individual or a group and operated for profit.

United States dependent.--Means those elementary and secondary school age dependents of United States citizens residing overseas and holding an American passport.

Host country Nationals.--Those persons who are citizens of the country in which the American-sponsored school is located.

Third country national.--A citizen residing in a country other than the United States who is neither a citizen of that country or of the United States. For example: third country nationals in the American International School in New Delhi, India, would be citizens of a country other than India or of the United States of America. Enrolled in that school, for example, are pupils representing twenty-three nations other than India and the United States.

Regional education officer.--Professional educator employed by the Office of Overseas Schools, United States Department of State to provide professional assistance to the American-sponsored schools overseas within a designated geographical region.

Education allowance.--Education allowance means an allowance to assist an employee in meeting the extraordinary

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and necessary expenses not otherwise compensated for, for the education of his dependent children, incurred by reasons of his service in a foreign area in providing adequate elementary and secondary education.

Hardship post.--A post that involves extraordinary difficult living conditions, excessive physical hardship, or notably unhealthful conditions affecting the majority of employees officially stationed or detailed at that place.

AID.--AID is the Agency for International Development. Although closely related to the Department of State in its involvement in foreign affairs, AID is separately administered and separately budgeted.

Normalista certificate.--A teaching certificate issued by a host national teacher training institution. Generally two years of training beyond the secondary level of schooling.

#### Philosophical Orientation

Certain underlying concepts are accepted in this thesis. These have to do with the conditions that American-sponsored schools overseas should meet in order to guarantee equal educational opportunities for their pupils, regardless of the pupils' temporary place of residence.

The first concept embraces the principle of "freedom of choice."<sup>27</sup> In the United States, parents are free to



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send their children to public or private schools, consistent with their own preference, interest, and financial ability. The right to choose the educational situation they deem to be appropriate for their children is assured under several basic legal determinations, including decisions by the United States Supreme Court. Under these interpretations, a parent is free to educate his child for purposes other than those established by the State. Whereas school attendance is mandated in the several States, public school attendance is not. In this thesis, the principle of "freedom of choice" is applied to the overseas situation for American parents as well. The non-resident American parent, it is argued, should be able to choose the educational situation he deems to be most appropriate for his children. This may be (but most frequently is not) a public school in the host country of his residence, or (more likely) one or more types of private institutions. If he is in the United States military service, most likely a United States type school will be available to him through the United States military operated school system.

To guarantee the United States citizen overseas a reasonable choice in this regard, two conditions or requirements evidently must be met. These are: (1) the family must have the financial means to enable it to purchase appropriate educational services abroad, and (2) those educational services must exist--or be made to exist--in a

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time and at a place where the family may acquire them for their children. That is to say, a guarantee of "freedom of choice" for the United States family overseas implies a companion guarantee, namely: "equal educational opportunity," for the children of such families. If these concepts are accepted as valid, then it follows that United States employers who assign families overseas have certain obligations or responsibilities with regard to these families, namely: (1) to provide each individual family the financial means whereby it may acquire an appropriate education for its children, and/or (2) to provide the overseas educational institution(s) the means whereby it may guarantee an appropriate educational opportunity for American families overseas.

The concept "appropriate and equal educational opportunity" requires definition. The concept does not imply the same educational program for all pupils. This would in fact deny "equal opportunity" for most pupils, inasmuch as individual pupils differ markedly in their requirements for education. Rather what is implied is an educational program that is precisely appropriate for each pupil, recognizing of course that there may be some program elements that appropriately may be common to many or all pupils.<sup>28</sup>

Neither does the concept, when applied to the overseas situation, imply that school programs provided overseas should be carbon copies of those that are provided in

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domestic schools in the United States. Most DOD schools have tended to offer standard instructional programs that are identical to those offered, for example, in a Keobuek, Iowa, or a Glen Falls, New York. Accordingly, they ignore one of the major advantages in the overseas education of American pupils, namely: a deep immersion in the mores and cultures of a second land.<sup>29</sup>

The ideal interpretation to be applied to the overseas setting would seem to be this, namely: (1) the transient nature of the United States pupils' enrollment in the overseas school is acknowledged; hence, the preponderance of program offerings would not differ markedly from those available to him in better United States schools; (2) the multi-national, multi-cultural setting in which the overseas school operates also is acknowledged; hence, wherever feasible, program offerings are enriched for the United States pupil by emphasizing his emersion into and study of the host country ways and cultures.<sup>30</sup>

Both United States government and business enterprises have come to realize their obligations in seeking to provide an appropriate and equal educational opportunity. The United States government provides educational allowances for certain employees overseas to pay tuition for their children to attend private overseas schools.<sup>31</sup> Business corporations have adopted similar practices. Where local schools were not deemed to be satisfactory, both United

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States government and business corporations have taken action to establish and operate educational institutions.<sup>32</sup> The most evident in this regard, of course, are the United States military operated schools overseas.<sup>33</sup> Several major companies also have established overseas schools for employees' children. Most recently, United States government and business employers have contributed directly to the support of private American-sponsored schools in major population centers overseas.<sup>34</sup> The United States government has been the prime mover in this regard, although business and industrial firms increasingly are contributing directly to the support of such schools (over and above allowances paid to employees for the education of their children).

Specific attention in this thesis is given to concrete ways whereby United States employers may support a cadre of American-sponsored schools overseas that can develop the capability to guarantee both (1) a reasonable "freedom of choice" for United States families overseas, and (2) an appropriate and equal educational opportunity for the children of such families.

### Planning Requirements and Objectives

It is further assumed that the objectives for any United States sponsored programs to assist or to improve American-sponsored schools should be consistent with the basic concepts described above, namely: to equalize educational opportunities for United States elementary and



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secondary pupils overseas. The framing of specific objectives requires a thorough reexamination of the conditions to be corrected and the precise means available here and overseas to alter those conditions. However, four general objectives might be identified as following directly from the basic concepts concerning the overseas education of United States pupils. In other words, if United States financial and technical assistance programs are to be helpful to schools in "equalizing educational opportunities" of American pupils overseas, it follows that they must achieve at least four general objectives, namely: (1) they must lead to an equalizing of programs and services among the diverse overseas schools, (2) they must lead to a normalizing of fiscal capacities among these schools, (3) they must lead to an equalizing of pupil performances among these schools, and (4) they must lead to a capability in the schools to renew themselves both as educational and as cultural enterprises.

These are discussed briefly, as follows.

Objective No. 1: Equalizing School Services.--

American-sponsored schools overseas differ markedly in the extent and quality of educational and related services they provide to United States pupils.<sup>35</sup> This is occasioned by the fact that many of these schools are geographically isolated, have relatively few pupils, and have extreme difficulty in recruiting and holding qualified school personnel.

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However, if United States pupils overseas are to be guaranteed an appropriate and equal educational opportunity, it follows that the extent, diversity and quality of services available to them in the American-sponsored school should not vary markedly from that ordinarily available to pupils in the United States. In other words, the place of a United States pupil's residence overseas should not be the determinant factor in the quality of that pupil's educational services. The quality of personnel, instructional materials, physical facilities, and curricula should not fall below an acceptable standard in any of the overseas American-sponsored schools. Factors of school size and location necessarily affect the cost and convenience of providing services to an acceptable standard. The hypothetically effective financial and/or technical assistance program would take these variables into account, however, so that the quality of services available to pupils does not vary markedly from school to school.

Objective No. 2: Normalizing Fiscal Capacities of the Overseas Schools.--The real cost to provide equivalent educational services necessarily varies among schools, by reason of school location, size, et cetera. The capacity of overseas schools to finance equivalent services to a standard also varies, by reason of location, economic level, or prevailing wage of school supporters. Overseas American-sponsored schools are supported principally from tuition.

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Accordingly, they are limited by availability of tuition to a fixed level of service to their pupils that may or may not meet an acceptable standard. A principal objective of any United States financial or technical assistance program, therefore, should be to eliminate or reduce the negative effects of an inadequate fiscal capacity on the provision of equal services and opportunities to American pupils overseas. In this regard, it is not argued that per pupil expenditures among schools should be equal. They should be normalized, however. That is, they should be brought within an acceptable range of a minimum level of expenditure in accordance with the real cost of providing equal services to pupils in the several schools. Since private tuition is not always adequate, outside assistance programs should seek to make up the difference.

Objective No. 3: Equalizing Educational Performance of Pupils in the Overseas Schools.--In this thesis it is argued that American-sponsored schools--as with counterpart domestic schools--should be held accountable for the results they produce with their pupils, not solely for the services rendered pupils. Equalized pupil performance, however, does not mean uniform performance. Rather, it implies that, for the group of American pupils overseas as compared to comparable pupils in United States schools, there will be no negative differences in educational performance attributed to the overseas schools. United States pupils overseas

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should--as a result of their studies in the overseas schools--read, figure, and use English at least as well as comparable pupils in the domestic schools. Moreover, with regard to host country language, customs, and culture, the overseas pupils should perform at a higher level of competency than their counterparts in the United States.

United States sponsored financial and technical assistance programs should have as a principal objective the equalizing of educational performance among pupils of the overseas schools. Conditions of grants-in-aid, for example, may be changed to reflect a concern for this objective, by incorporating in grants the principle of "pay for results."

Objective No. 4: Renewing the Educational Capability of Overseas Schools.--The obligation to guarantee equal educational opportunities for United States pupils abroad implies that the overseas school must maintain an up-to-date capability with respect to educational and instructional systems and technology. Because they are multi-national and/or multi-cultural institutions, their capability for assisting pupils to immerse themselves in cross-cultural endeavors should be continuously developed as well.

Provisions for systems or program renewal are characteristic of most viable institutions in the United States. For example, approximately 20 per cent of the United States investment in national defense goes for "futures," that is: new weapons and/or defense systems development. Most



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progressive business and industrial corporations are concerned with the timely and systematic replacement of plant and corporate technology, as their productive systems become obsolete or non-competitive.

Schools and school systems in the United States have not attended to their need for systems renewal; consequently, current educational and instructional practice sometimes lags far behind the most advanced thinking in the field. Because of their geographic isolation, American-sponsored schools overseas are even more subject to rapid obsolescence than domestic institutions. Yet the American-sponsored school overseas, because of its multi-cultural setting and student body, is well situated to justify and accept new instructional practice, and to innovate as well.

A major objective of United States sponsored financial and technical assistance programs, therefore, should be to develop within the individual overseas schools the continuing capability to introduce new instructional practice and to exploit the multi-cultural setting in which it is located to enrich the content of educational experience for its pupils.

#### Issues Examined in the Thesis

One purpose of the thesis is to examine certain characteristics of the American-sponsored schools overseas, and to assess their capability to meet the requirements established above for educating American elementary and

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secondary pupils overseas. Although formal hypotheses were not constructed for examination in the thesis, certain tentative general statements about the schools were considered. These are:

1. The general problem in trying to relate the programs of American-sponsored schools overseas to systems requirements for the overseas education of American pupils is two-fold, namely:
  - a. The 128 schools do not constitute a functional educational system that is responsive to the educational requirements of United States elementary and secondary pupils overseas.
  - b. The individual schools, moreover, lack certain basic capabilities, both as educational and as multi-cultural institutions.
2. It follows, therefore, that programs for corrective action (i.e., United States sponsored financial and/or technical assistance programs) necessarily must address both systems development as well as institution development problems, hence employ both system development<sup>36</sup> and institutional development<sup>37</sup> strategies and activities.
  - a. The systems development objectives of such programs evidently would include: (1) the

equalizing of educational services among the 128 American-sponsored schools, and (2) the normalizing of the fiscal capabilities of the 128 schools.

- b. The institutional development objectives of such programs evidently would include: (1) equalizing the educational performance of pupils in the several schools, and (2) renewing the capacity of each institution to assimilate educational, instructional, and cultural changes.

#### Hypotheses Generated in the Thesis

A second major purpose of the thesis is to construct one or more management strategies that--on the basis of logic, experience, and best available evidence--might appropriately be adopted by United States sponsored financial and technical assistance programs for meeting the systems and institutional development objectives established for the overseas American-sponsored schools. Two such strategies are developed in the thesis. Each is generated as a hypothesis, since neither has been tested fully in practice or experiment.

The first strategy involves a new kind of financial assistance program, engaging both United States government and business establishments, the aims of which are: (a) to create a functional and responsive system of American-

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sponsored schools overseas, and (b) to introduce a "pay for results" principle in funding certain institutional development activities in those schools.

The second strategy involves a new kind of personnel development program that aims principally to increase the institutional effectiveness of the individual American-sponsored school overseas.

### Overview of the Thesis

In this first chapter, the central purposes of the thesis were developed and explicated. A major problem of importance was described, and evidence advanced in support of a methodology to treat the problem was described. The rational and philosophic bases for examining and correcting the conditions of the schools under study were established, and certain tentative general statements or hypotheses were developed around which the remaining chapters of the thesis could be organized.

In the chapters that follow, the principal steps involved in the development of the thesis are delineated. These are as follows:

In Chapter II certain characteristics of American-sponsored schools overseas are summarized and examined. It is observed that the schools are deficient in significant ways, but a hypothesis is advanced that these conditions are correctable.

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In Chapter III the major financial and related assistance programs that have been introduced to help support and improve the American-sponsored school overseas are examined. It is observed that these programs have not been uniformly effective, although well intended. It is observed also that these assistance programs seem more closely related to certain of the institution-building requirements of the individual schools than to the overall systems requirements for the education of United States pupils overseas. It is hypothesized that these conditions are correctable by assimilating many of the independent and unrelated assistance activities into a systematic management strategy and program.

In Chapter IV the elements of a management approach to the improvement of American-sponsored schools are identified, and two major management strategies are developed.

In Chapter V the management strategies advanced in Chapter IV are criticized, and specific activities are suggested for implementing the strategies.

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## FOOTNOTES

<sup>1</sup>Grants-in-aid is here defined as a method that provides assistance to selected overseas schools either in funds which do not require repayment which are called "grants" or in technical assistance.

<sup>2</sup>Herbert G. Vaughan, "The American School of Guatemala and its Relation to Guatemalan Education: A Descriptive Case Study" (unpublished Ph.D. dissertation, Michigan State University, 1968).

<sup>3</sup>Stanley S. Bean, "A Historical and Comparative Study of the American-Sponsored School in Sao Paulo, Brazil" (unpublished Ph.D. dissertation, University of Arkansas, 1968).

<sup>4</sup>George Patrick Young, Jr., "A Study of the Potential for Achievement of Better Inter-American Relationship through North American Schools in Latin America" (unpublished Ph.D. dissertation, University of Illinois, 1960).

<sup>5</sup>Lynn C. Bartlett, et al., Department of Defense Schools Overseas, Report of Study Commission, 1962-64.

<sup>6</sup>Melvin B. Cole. et al., American Dependent's Schools, Report to the Agency of International Development (AID), Washington, D.C., 1964.

<sup>7</sup>Paul G. Orr, "Binational Schools in Latin America" (unpublished Ph.D. dissertation, Michigan State University, 1964).

<sup>8</sup>Charles J. Patterson, "A Comparison of Performances of Mexican and American Children in a Bi-cultural Setting on Measures of Ability, Achievement, and Adjustment," Bulletin No. 30 (Mexico, D.F.: American School Foundation, 1960).

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<sup>9</sup>Howard H. Kardatzke, "Cultural-Institutional and Teacher Influences upon Social Studies Curriculum and Instruction: An Exploratory Study" (unpublished Ph.D. dissertation).

<sup>10</sup>Orr, "Binational Schools in Latin America," p. 68.

<sup>11</sup>Robert G. Seaquist, "A Study to Develop a Planning Base for the Association of Colombian-American Binational Schools" (unpublished Ph.D. dissertation, University of Alabama, 1968).

<sup>12</sup>Bob King, "The Recruitment, Selection, and Retention of Teachers for Overseas Schools" (unpublished Ph.D. dissertation, Wayne State University, 1968).

<sup>13</sup>Ann Domidion, "The Role of the Administrator in Independent Overseas Schools for Americans" (unpublished Ph.D. dissertation, Columbia University, 1964).

<sup>14</sup>Karl T. Hereford, ed., "The American School in Mexico: A Survey for the Association of American Schools in the Republic of Mexico" (East Lansing, Mich.: College of Education, Michigan State University, 1961). (offset)

<sup>15</sup>Carl Horn, "The American Schools in Central America" (East Lansing, Mich.: Michigan State University, 1963). (offset)

<sup>16</sup>Edward W. Rushton and Finis E. Engleman, "American Sponsored Overseas Schools: A Second Look" (Washington, D.C.: Office of Overseas Schools, 1969). (Mimeographed.)

<sup>17</sup>Paul T. Luebke, "American Elementary and Secondary Community Schools Abroad" (Washington, D.C.: AASA, 1969).

<sup>18</sup>David M. Bjork, "Theoretical Models for Intercultural School Administration in the United States Conceptualized from a Study of Cross-Cultural Factors in Latin America" (unpublished Ph.D. dissertation, University of Alabama, 1965).

<sup>19</sup>Seaquist, "Planning Base," p. 219-221.

<sup>20</sup>Perennially, proposals are made to transfer the administration of the DOD schools to the United States Office of Education.

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<sup>21</sup>Finis E. Engleman and Paul T. Luebke, The Mission Called O/OS (Washington, D.C.: AASA, 1965), pp. 44-45.

<sup>22</sup>Paul G. Orr, Summary of University of Alabama Programs in Mexico, Colombia, and Venezuela, Report to the Office of Overseas Schools, 1969.

<sup>23</sup>An additional 25,000 host and third country national pupils also are enrolled in the American-sponsored schools overseas involved in this study.

<sup>24</sup>Lyndon B. Johnson, "International Health and Education Programs," President Johnson's Message to the Congress, February 2, 1966 in Weekly Compilation of Presidential Documents, II, No. 5 (February 7, 1966), pp. 141-177.

<sup>25</sup>Young, "Inter-American Relationship," pp. 75-79.

<sup>26</sup>See Bibliography for Orr, Summary of University, pp. 219-222. Also see John J. Brooks, ed., Sourcebook for Overseas Schools (New York: ISS, 1964). For Europe, East Asia, and Africa see Finis E. Engleman, Mission Called O/OS.

<sup>27</sup>This concept is not the same as used in certain litigations of civil rights suits under provisions of the 1964 Civil Rights Act. The issues in those suits center on the parent's right to send their child to a private racially segregated school to avoid desegregation of public school facilities. In this thesis, the concept "freedom of choice" is used in its more literal context.

<sup>28</sup>A full discussion of this concept is developed in A Plan of Public Expenditure for Education in North Dakota: The Foundation Program (Grand Forks, N.D.: University of North Dakota Press, 1967).

<sup>29</sup>Bartlett, Department of Defense Schools, pp. 7-9.

<sup>30</sup>The "Blended Curriculum" is one concrete example of this principle as applied in certain American-sponsored schools in Latin America. See Orr, Summary of University, pp. 135-136.

<sup>31</sup>The provisions for educational allowances is grounded in the following legislation:  
(a) PL 84-22 Foreign Service Act amendments of 1955.

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(b) PL 86-707 Overseas Differentials and Allowances Act of 1960, as amended.

(c) Presently codified as 5 USC 5924(4).

<sup>32</sup>Engleman, Mission Called O/OS, p. 6.

<sup>33</sup>Anthony Cardinale, "Overseas Dependents Schools of the DOD," Phi Delta Kappan, XLVIII, No. 9 (May, 1967), pp. 461-462.

<sup>34</sup>Leubke, "Community Schools Abroad," p. 16.

<sup>35</sup>Engleman, Mission Called O/OS, p. 11.

<sup>36</sup>Systems development is here defined as follows: when strategies and activities will establish systematic linkages between the several schools and other organizations so that the educational services available in the several schools will be equalized. This is to say that appropriate and equal educational opportunities will be available for all the pupils. Each American-sponsored school overseas is a separate autonomous enterprise. The 128 schools don't presently have the inclination nor the capacity to respond as a member of one system.

<sup>37</sup>Institutional development is here defined as follows: when strategies and activities will create a capacity within the individual school that will produce a viable educational institution which will ensure equalized educational performance for pupils in that school.

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## CHAPTER II

### THE AMERICAN-SPONSORED SCHOOL OVERSEAS

In 1970, there were approximately 158 American-sponsored schools overseas that were eligible for assistance from the Department of State. In this chapter, attention is given to those 128 schools that were supported in part by the Office of Overseas Schools of the United States Department of State in school year 1968-69.<sup>1</sup> The purpose of the chapter is two-fold, namely: (1) to summarize the essential characteristics of the 128 schools, and (2) to assess their capabilities for meeting the evident needs of overseas American elementary and secondary school pupils for quality education.

In content, the chapter is both descriptive and analytic. Primary sources of data are employed to describe the current status of the overseas American-sponsored schools, and secondary sources largely for the evaluative content.

#### Sources of Data

Primary source statistical data are current for the school year 1968-69. These data were compiled from official

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reports submitted to the Office of Overseas Schools of the United States Department of State by the individual American-sponsored schools at the time of its application for Federal financial assistance.<sup>2</sup> Each such application (with accompanying program budget justifications) is summarized routinely by the professional staff of the Office of Overseas Schools and published for each school in the form of an abridged "Fact Sheet" (see Appendix B).

Evaluative data and observations are based largely upon secondary sources. Principal among these are the direct observations and conclusions of Office of Overseas Schools regional education officers (REO), each of whom maintains an on-site relationship with a group of American-sponsored schools in a particular geographic region. Three "REOs" currently monitor United States assisted programs among the American-sponsored schools in: (1) the American Republics, (2) Europe, the Near East, and South East Asia, and (3) East Asia and Africa. The REO is an experienced United States educator with five or more years experience in overseas work. Two of the three REOs have earned doctorates; the third is completing the doctorate in 1970.

Other sources of data and evaluative judgment were derived from the published works of several authorities on American-sponsored schools overseas. Principal among these are the following:

1. Nelson A. Rockefeller, "Report on Conditions among American-Sponsored Schools in Europe, Asia, and Africa," Department of State, 1959.
2. Karl T. Hereford, "The American School in Mexico" (East Lansing, Mich.: Michigan State University, 1961).
3. Kenneth H. Hansen, et al., "American-Sponsored Schools in Africa" (Washington, D.C.: Bureau of Cultural Affairs, United States Department of State, 1964).
4. M. B. Keyer, et al., "American-Sponsored Schools in Mexico and South American Countries" (Washington, D.C.: Bureau of Educational and Cultural Affairs, 1964).
5. George W. McGowan, et al., "Educational Facilities for United States Government Dependent Children in Southeast Asia" (Washington, D.C.: Office of Personnel Administration, Agency for International Development, 1963) .
6. Harlan Cleveland, et al., The Overseas American (New York: McGraw Hill Book Company, 1964).
7. Melvin B. Cole, et al., "American Dependent's Schools," Report to the Agency for International Development (AID), Washington, D.C., 1964.
8. Sam M. Lambert, et al., "A Study of American-Sponsored Secondary Education in Sub-Sahara

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9. Edward W. Rushton, et al., "The American-Sponsored School: A Second Look" (Washington, D.C.: American Association of School Administrators, 1969).

The chapter is divided into three major parts, namely: (1) current status of American-sponsored schools overseas, (2) strengths and weaknesses of the schools, and (3) summary and conclusions.

#### Status of American-Sponsored Schools Overseas

In school year 1968-69, there were 128 American-sponsored schools overseas that received one or more financial grants from the United States Department of State's Office of Overseas Schools. These schools were located in seventy-four countries and in five major geographic regions of the world. Seventeen schools were located in Africa, forty-six in the American Republics, twenty-eight in Europe, thirteen in East Asia, and twenty-four in the Near East and South Asia.

Each of these schools is independently chartered in the host country overseas for the purpose of offering an "American-type" education to the American elementary and secondary pupils overseas who reside there. Each has a



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"community type" board comprised by parents and/or patrons of the school. The vast majority serve children of host and third country families as well as United States pupils. All are organized not for profit. Each is non-sectarian. They differ from other private schools for American pupils overseas which typically are classed either as "Proprietary," "Church-Related" or "Company Operated."<sup>3</sup>

The community operated schools in general were established much later in history than the early mission schools and company-operated schools. Only one of the 128 American-sponsored schools overseas under study was established prior to 1900,<sup>4</sup> and only thirteen more were established prior to 1941. In the next twenty years an additional sixty-nine came into being; forty-five have been established since 1960 (see Table 1).

#### School Organization

The 128 American-sponsored schools overseas vary markedly in their grade level organization. About one-half of the schools offer a full elementary and secondary school program, either K-12 or grades 1-12. Only five schools are limited to the first six grades. However, an additional fifty-five schools are organized as K(1-8), K(1-9), K(1-10), or K(1-11). Another five schools limit offerings to the upper six grades (6-12). Only ninety-five of the 128 schools under study provide Kindergarten programs. These data are summarized in Table 2.

TABLE 1.--Data of establishment of the American-sponsored schools overseas: 1900-1970.

Region	Africa	American Republics	Europe	East Asia	Near East	Total	Per Cent
					S. Asia		

Approximate data of

**TABLE 1.--Date of establishment of the American-sponsored schools overseas: 1900-1970.**

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Approximate date of Establishment:							
Prior to 1900	--	1	--	--	--	1	0.8
1900-1940	--	10	--	2	1	13	10.2
1941-1950	1	13	4	1	4	23	18.1
1951-1960	4	18	7	6	11	46	36.3
1961-1965	8	3	9	3	8	31	24.4
Since 1965	4	1	8	1	--	14	10.2
Total	17	46	28	13	24	128	100.0

Source: "Fact Sheets" for Individual Schools: 1968-69 School Year.

TABLE 2.--Number of American-sponsored schools overseas by school organization and by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total

**TABLE 2.--Number of American-sponsored schools overseas by school organization and by geographic region: 1968-69.**

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total
<b>Grade Levels Offered</b>						
1st up to 6th	1	1	1	1	--	4
K(1-6)	--	1	--	--	--	1
1-8	4	--	3	--	6	13
K(1-8)	3	3	6	2	3	17
1-9	2	--	--	1	--	3
K(1-9)	1	6	4	--	2	13
K(1-10)	1	2	2	1	--	6
K(1-11)	--	1	--	1	1	3
1-12	--	2	1	2	3	8
K(1-12)	3	30	8	5	9	55
6-12	2	--	3	--	--	5
<b>Total</b>	<b>17</b>	<b>46</b>	<b>28</b>	<b>13</b>	<b>24</b>	<b>128</b>

Source: Form No. FS-573, p. 1.

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The variance to be observed in school organization is not limited to geographic region of the world. Schools offering twelve or thirteen grades are found in each region, although newer schools tend to provide fewer grades of instruction than older schools regardless of regional location. Hence, areas such as Africa and Europe--with a greater proportion of new schools--tend to have schools with fewer than twelve grades of instruction. It would appear, however, that with increased enrollments in the newer schools, two-thirds or more of the schools could offer a complete (i.e., K-12) elementary and secondary school program.

#### School Enrollment

Approximately 60,000 pupils were enrolled in the 128 schools in 1968-69. However, the schools varied widely in the number of pupils each enrolled. Twenty-eight schools enrolled fewer than 100 pupils; only forty-two enrolled 500 or more pupils. Moreover, some schools with limited enrollments endeavored to offer a full elementary and secondary school program. Twenty-three schools, for example, offered twelve or more grades but enrolled fewer than 500 pupils for an average of twenty to twenty-five pupils per grade. Only forty schools offered twelve or more grades with an average enrollment per grade of fifty or more pupils. Fifteen schools enrolled 1,000 or more pupils, the



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#### Composition of School Enrollment

About 56 per cent of the approximately 60,000 pupils<sup>5</sup> enrolled in 1968-69 were children of United States citizens overseas. About 30 per cent of the pupils were children of host country nationals, and about 14 per cent were children of third country nationals.<sup>6</sup>

Variance in per cent of United States pupils in school enrollment may be observed among the several regions of the world. Only 35 per cent of enrolled pupils in the American Republics are United States children, while nearly 82 per cent of enrolled pupils in the American-sponsored schools of East Asia are United States pupils. These data are summarized in Table 4.

Amont the smaller American-sponsored schools, however, the proportion of host country nationals is one-half that reported for larger schools. Concomitantly, the proportion of third country nationals enrolled in the smaller schools is nearly double that in the larger schools. Since small schools typically are new, it would appear that United States citizens and third country nationals take the initiative in establishing these schools. The proportion of third country nationals, for example, in schools that enroll 1,000 pupils or more is less than 8 per cent of enrollment. As schools get larger and older, the proportion

TABLE 1.--Number of the American-sponsored schools overseas by school organization and total school enrollment: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total

TABLE 3.--Number of the American-sponsored schools overseas by school organization  
and total school enrollment: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total
<b>Grade Levels Offered:</b>							
1st up to 6th	3	--	1	--	--	--	4
K(1-6)	1	--	--	--	--	--	1
1-8	9	3	1	--	--	--	13
K(1-8)	6	9	--	2	--	--	17
1-9	2	--	--	--	1	--	3
K(1-9)	3	4	2	4	--	--	13
K(1-10)	--	--	3	2	--	1	6
K(1-11)	--	--	2	1	--	--	3
1-12	1	2	--	--	2	3	8
K(1-12)	--	4	9	7	24	11	55
6-12	3	1	1	--	--	--	5
Total	28	23	19	16	27	15	128

Source: Form No. FS-573, p. 1.

TABLE 4.--Composition of pupil enrollment in the American-sponsored schools overseas by nationality and the school's geographic location: 1968-69.

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TABLE 4.--Composition of pupil enrollment in the American-sponsored schools overseas by nationality and the school's geographic location: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Totals
Number of Schools	17	46	28	13	24	128
United States Pupils	1,982 (54.6%)	9,727 (35.3%)	5,613 (67.8%)	9,799 (81.6%)	6,547 (73.4%)	33,668 (55.7%)
Host Country Nationals	551 (15.2%)	15,391 (55.8%)	892 (10.8%)	634 ( 5.2%)	773 ( 8.7%)	18,241 (30.2%)
Third Country Nationals	1,098 (30.2%)	2,439 ( 8.9%)	1,772 (21.4%)	1,581 (13.1%)	1,599 (17.9%)	8,489 (14.1%)
Total	3,631	27,557	8,277	12,014	8,919	60,398

Source: Form No. FS-573, p. 3.

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Regardless of region or size of school, United States pupils constitute 25 to 75 per cent of total enrollment for about half of the American overseas schools. Only nine of the 128 schools enroll fewer than 10 per cent United States pupils, and only eight schools enroll 90 per cent or more United States pupils in total enrollment. Consequently, it may be inferred that the American-sponsored schools overseas fairly typically are bi-national or multi-national in enrollment (see Table 6).

Background and Location of United States  
Pupils in Enrollment

In 1968-69, an estimated 33,725 United States pupils were enrolled in the 128 American-sponsored schools overseas. Of these, 9,727 or 29 per cent attended American-sponsored schools in the American Republics; another 29 per cent were enrolled in the thirteen East Asian schools. About 19 per cent attended the twenty-four Near Eastern and South Asian schools; another 17 per cent were enrolled in European schools, and 6 per cent were enrolled in the seventeen African schools.

The United States pupils were dependents principally of United States government and business organizations. Of the 33,725 enrolled United States pupils in 1968-69, 15,020 or approximately 45 per cent were dependents of United



TABLE 5.--Composition of student enrollment in the American-sponsored schools overseas  
by country origin and size of school: 1968-69.

TABLE 5.--Composition of student enrollment in the American-sponsored schools overseas by country origin and size of school: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total
Number of Schools	28	23	19	16	27	15	128
United States Pupils	918 (63.2%)	1,803 (54.7%)	2,393 (50.5%)	3,354 (53.4%)	10,602 (53.0%)	14,598 (59.2%)	33,668 (55.7%)
Host Country Nationals	190 (13.1%)	409 (12.4%)	1,533 (32.4%)	1,634 (26.0%)	6,299 (32.6%)	8,176 (33.2%)	18,241 (30.2%)
Third Country Nationals	344 (23.7%)	1,082 (32.9%)	809 (17.1%)	1,294 (20.6%)	3,078 (15.4%)	1,882 ( 7.6%)	8,489 (14.1%)
Total	1,452 (100.0%)	3,294 (100.0%)	4,735 (100.0%)	6,282 (100.0%)	19,979 (100.0%)	24,656 (100.0%)	60,398 (100.0%)

Source: Form No. FS-573, p. 3.

TABLE 6.--Per cent of Americans enrolled in the American-sponsored schools overseas by  
geographic region: 1968-69.

TABLE 6.--Per cent of Americans enrolled in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per cent of Schools in Sample
Per Cent of United States Pupils in Enrollment:							
Less than 10%	--	8	--	--	1	9	7.0
10-24%	4	9	2	--	1	16	12.5
25-49%	2	11	8	--	4	24	18.8
50-74%	5	14	9	5	9	43	33.6
75-89%	6	3	8	6	5	28	21.9
90% or more	--	1	1	2	4	8	6.2
Total	17	46	28	13	24	128	100.0

Source: Form No. FS-573, p. 3.

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States government employees overseas; another 33 per cent were dependents of United States business officials assigned overseas. An additional 7,490 United States pupils were dependents of United States parents not associated either with government or business enterprises overseas. These data are summarized in Table 7.

#### Characteristics of the Teaching Force

In 1968-69, the 128 American-sponsored schools employed an estimated 3,570 full time teachers and an additional 830 part time teachers. The full time equivalent faculty was estimated to be 3,630. Of these full time equivalents, 54.1 per cent were United States, 32.7 per cent host national, and 13.2 per cent third country nationals (see Table 8).

From the Form No. FS-573 (see Appendix C) reports completed by the 128 schools, it was possible to determine five basic characteristics of the teaching force overseas. This included its composition, training, experience, legal certification, and compensation. These characteristics are discussed each in the paragraphs that follow.

#### Composition of Faculty

The composition of faculties in the American-sponsored schools overseas does not differ markedly from the composition of the student body in those schools. From data available from 127 of the 128 schools, it was clear that in 1968-69 about half of the schools employed from 25 per cent



TABLE 7.--Number of United States pupils enrolled in the American-sponsored schools overseas by dependence and geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total
Number of Schools	17	46	28	13	24	128
Dependents of:						
A. United States Government	1,260	2,682	1,299	6,361	3,418	15,020
B. United States Business	258	3,824	3,238	1,877	2,018	11,215
C. Other	473	3,241	1,076	1,571	1,119	7,490
Total	1,981	9,727	5,613	9,799	6,547	33,725

Source: Form No. FS-573, p. 3.



TABLE 8.--Number of classroom teachers (in full time equivalents) by country origin in  
the American-sponsored schools overseas: 1968-69.

TABLE 8.--Number of classroom teachers (in full time equivalents) by country origin in the American-sponsored schools overseas: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total	Per Cent
Number of Schools	28	23	19	16	27	15	128	
Nationality:								
A. United States Teachers	81.90	133.45	189.63	215.28	635.85	708.60	1,964.71	54.1
B. Host National Teachers	21.99	61.06	84.53	96.74	382.53	538.41	1,185.26	32.7
C. Third Country Teachers	27.50	54.90	75.80	66.75	171.15	83.60	479.70	13.2
Total	131.39	249.41	349.96	378.77	1,189.53	1,330.61	3,629.67	100.0

Source: Form No. FS-573A, p. 2.

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to 75 per cent of their faculties from the United States. Only three of the 127 schools employed less than 10 per cent United States teachers, while nine employed 90 per cent or more United States teachers. The distribution differs only slightly from that reported for pupils in Table 6.

A greater proportion of schools in Africa and East Asia hired 75 per cent or more United States teachers than the schools elsewhere. Schools in the American Republics reported a greater proportion of non-United States teachers in 1968-69. Only two of the forty-five schools there hired as many as 75 per cent United States teachers, for example. These data are summarized in Table 9.

Moreover, as with pupils (see Table 5), the distribution of United States teachers and third country nationals is proportionately greater in the small overseas schools than in the larger schools, averaging 54.1 and 13.2 per cent respectively in all schools (see Table 8). As with pupils (see Table 4), the distribution of United States teachers also is greater among schools in Africa, Near East South Asia, and East Asia than in other areas. The national origin composition of the faculties in the American Republics is more nearly bi-national or multi-national than in any other region, however (see Table 10).

#### Source and Location of United States Teachers Overseas

United States teachers in the American-sponsored schools in 1968-69 came from six different sources. Of

TABLE 9.--Number of American-sponsored schools overseas by geographic region and percentage of faculty that is United States: 1968-69.

TABLE 9.--Number of American-sponsored schools overseas by geographic region and percentage of faculty<sup>1</sup> that is United States: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Per Cent United States Faculty of Total Faculty:							
Less than 10%	--	2	--	1	--	3	2.4%
10-24%	2	19	1	--	3	15	11.8%
25-49%	1	16	8	1	2	28	22.0%
50-74%	5	16	12	4	9	46	36.2%
75-89%	5	1	6	5	9	26	20.5%
90% or more	4	1	1	2	1	9	7.1%
Total	17	45	28	13	24	127	100.0%

Source: Form No. FS-573A, p. 2.

<sup>1</sup>Includes administrators both full and part time members.

TABLE 10.--Number of classroom teachers (in full time equivalents) by country origin in the American-sponsored schools overseas by geographic region: 1968-69.

TABLE 10.--Number of classroom teachers (in full time equivalents) by country origin in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	24	128	
Nationality:							
United States Teachers	148.45	623.31	334.60	468.35	390.00	1,964.71	54.1
Host National Teachers	12.00	769.61	108.30	187.35	108.00	1,185.26	32.7
Third Country Teachers	69.15	117.35	142.35	70.80	80.05	479.70	13.2
Total	229.60	1,510.27	585.25	726.50	578.05	3,629.67	100.0

Source: Form No. FS-573A, p. 2.



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2,497 on whom information was available in that year, 1,296 or 52 per cent were recruited from the United States for that purpose. An additional 1,054 or 42 per cent were in the country in which they were teaching by reason of the fact that they were dependents of United States, host country, or third country employees in the host country, of which approximately one-third were dependents of United States government employees overseas. The remaining 147 United States teachers were not recruited. Nor were they available by reason of dependence on employees in the host country. These included itinerate teachers, graduate students in travel status, and others that were non-classifiable. The distribution of these teachers in the five major geographic regions may be observed in Table 11.

#### Preparation of Overseas Teachers

Approximately 94 per cent of all teachers employed in the American-sponsored schools in 1968-69 held some sort of formal degree or diploma signifying preparation to teach. (The possession of a diploma is not the same as the acquisition of a certificate or license to teach, as will be discussed momentarily.) Of the 226 teachers who were reported to be employed without a degree, 94 were United States citizens, 98 were host country nationals, and 34 were third country nationals.

Nearly 61 per cent of the teachers held degrees from United States institutions. Twenty-five persons held an



TABLE 11.--Source and location by geographic region of United States teachers in the American-sponsored schools overseas: 1968-69.

Region	Africa	American Republic	Europe	East Asia	Near East S. Asia	Totals
Number of Schools	17	46	28	13	24	
United States Recruit- ment <sup>a</sup>	88	422	301	218	267	1,296
United States Govern- ment Dependent <sup>b</sup>	35	60	19	186	70	370
United States De- pendent <sup>c</sup>	29	148	30	111	79	397
United States Dependent Host National <sup>d</sup>	24	118	50	15	56	263
United States Dependent Third Country <sup>e</sup>	3	12	1	6	2	24
Other United States <sup>f</sup>	8	51	30	36	22	147
Total	187	811	431	572	496	2,497

Source: Form No. FS-573A, p. 2.

<sup>a</sup>United States citizen recruited from USA.

<sup>b</sup>Dependent of United States government employee assigned overseas.

<sup>c</sup>Dependent of United States citizen living overseas (other than US government employee).

<sup>d</sup>Dependent of host country national.  
<sup>e</sup>Dependent of third country national.  
<sup>f</sup>Other United States citizen (not classifiable).

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earned doctorate, 694 a masters degree, 1,415 held a bachelor degree, and 40 held other types of college or university certificates including that of associate of arts, registered nurse, or post-secondary teaching certificate.

Approximately one-third of the employed teachers held earned degrees or certificates from institutions other than those in the United States. These were not classifiable from the data available from the schools in that year. However, the regional education officers from the United States Department of State's Office of Overseas Schools (A/OS) reported great variance among these. Most clearly, they are not comparable among themselves or with college degrees in the United States. They range from a normalista certificate earned in Guatemala after twelve years of public school to a doctor of jurisprudence earned in France after seven years of post-secondary study.

Interestingly, some host country and third country teachers held United States degrees. In 1968-69, 183 were reported to do so, or about one in eight of those teachers who were employed in that year. These data appear in Tables 12 and 13.

The distribution of degrees among the 870 part time teachers in 1968-69 was somewhat different. In Table 14, it is evident that 30.5 per cent of the part time teachers held a United States degree or diploma; 230 of these were part time United States teachers. About 54 per cent of the

TABLE 12. -- *Highway mileage owned by full-time residents in American-owned vehicles*

Region	Africa	American	Europe	East Asia	Near East	Line	Group	Per
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TABLE 12.--Highest degrees earned by full time teachers in American-sponsored schools overseas: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Line Totals	Group Totals	Per Cent
<u>Number of Schools</u>	17	46	28	13	23		127	
<u>United States</u>	157	684	359	538	436		2,174	60.9
<u>Degrees:</u>	(66.5%)	(49.1%)	(62.8%)	(68.7%)	(74.3%)			
United States Teachers	151	589	348	489	414	1,991		
Host Teachers	3	80	6	38	19	146		
Third Country Teachers <sup>a</sup>	3	15	5	11	3	37		
<u>Other Degrees:</u>	72	576	202	196	124		1,170	32.8
	(30.5%)	(41.4%)	(35.3%)	(25.0%)	(21.1%)			
United States Teachers	--	18	3	6	--	27		
Host Teachers	9	476	77	141	73	776		
Third Country Teachers <sup>a</sup>	63	82	122	49	51	367		
<u>No Degree:</u>	7	132	11	49	27		226	6.3
	( 3.0%)	( 9.5%)	( 1.9%)	( 6.3%)	( 4.6%)			
United States Teachers	5	48	4	26	11	94		
Host Teachers	1	73	4	13	7	98		
Third Country Teachers <sup>a</sup>	1	11	3	10	9	34		
Full Time Teacher Total	236	1,392	572	783	587		3,570	100.0

Source: Form No. FS-573A, p. 2.

<sup>a</sup>Third country national teacher.



TABLE 13.--Highest degree earned by full time teachers in American-sponsored schools overseas by geographic region and by country origin: 1968-69.

Region	Africa	American	Europe	East Asia	Near East & Asia	Line Total	Group Total	Per Cent
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TABLE 13.--Highest degree earned by full time teachers in American-sponsored schools overseas by geographic region and by country origin: 1968-69.

Region	Africa			American Republics			Europe			East Asia			Near East S. Asia			Line Group Total	Per Cent
Number of Schools	17			46			28			13			23			127	
Degree	USA	H <sup>b</sup>	TC <sup>c</sup>	US	H	TC	US	H	TC	US	H	TC	US	H	TC		
<u>United States Degrees:</u>	151	3	3	589	80	15	348	6	5	489	38	11	414	19	3	2,174	60.9
Doctor	--	--	--	6	2	--	5	--	--	8	--	--	4	--	--	25	
Master	42	2	1	141	15	7	147	2	3	141	23	6	146	16	2	694	
Bachelor	102	1	2	426	59	8	193	4	1	336	15	5	259	3	1	1,415	
Teaching Certificate	1	--	--	3	--	--	1	--	--	--	--	--	--	--	--	5	
Associate of Arts'	2	--	--	11	3	--	1	--	1	3	--	--	1	--	--	22	
RN	4	--	--	2	1	--	1	--	--	1	--	--	4	--	--	13	
<u>Other Degrees</u>	--	9	63	18	476	82	3	77	122	6	141	49	--	73	51	1,170	32.8
<u>No Degree</u>	5	1	1	48	73	11	4	4	3	26	13	10	11	7	9	226	6.3
Total																3,570	

Source: Form No. FS-573A, p. 2.

<sup>a</sup>United States teachers in overseas schools.

<sup>b</sup>Host country national teachers in overseas schools.

<sup>c</sup>Third country national teachers in overseas schools.

TABLE 14. -- *Immigrant children reported by birth place and country of origin, 1968-69.*

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Line Totals	Group Totals	Per Cent
Number of Schools	17	46	28	13	23		127	

TABLE 14.--Highest degrees earned by part time teachers in American-sponsored schools overseas by geographic region and country origin: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Line Totals	Group Totals	Per Cent
<u>Number of Schools</u>	17	46	28	13	23		127	
<u>United States Degrees:</u>	15 (51.8%)	127 (23.9%)	42 (31.1%)	38 (53.5%)	43 (41.3%)		265	30.5
US Teachers	14	104	42	31	39	230		
Host Teachers <sup>a</sup>	--	22	--	4	3	29		
T.C. Teachers <sup>b</sup>	1	1	--	3	1	6		
<u>Other Degrees:</u>	10 (34.4%)	327 (61.6%)	69 (51.1%)	23 (32.4%)	40 (38.5%)		469	53.9
US Teachers	1	3	2	1	1	8		59
Host Teachers <sup>a</sup>	--	303	40	16	28	387		
T.C. Teachers <sup>b</sup>	9	21	27	6	11	74		
<u>No Degree:</u>	4 (13.8%)	77 (14.5%)	24 (17.8%)	10 (14.1%)	21 (20.2%)		136	15.6
US Teachers	--	10	5	7	10	32		
Host Teachers <sup>a</sup>	--	58	11	1	2	72		
T.C. Teachers <sup>b</sup>	4	9	8	2	9	32		
<u>Total Part Time Teachers</u>	29	531	135	71	104		870	100.0

Source: Form No. FS-573A, p. 2.

<sup>a</sup>Host country national teachers.

<sup>b</sup>Third country national teachers.

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part time teachers held some other degree, diploma, or certificate of training, and 15.6 per cent held no degree or diploma. The majority of non-United States degrees were held by host country nationals, most of whom were employed in the schools of the American Republics.

#### Years of Professional Experience

When reports from 127 schools were tabulated, it was found that about 40 per cent of the teachers and administrators who were employed full time in 1968-69 had less than six years of overall professional experience. Only 259 of the full time employees, or 7.1 per cent of the total, had less than one year prior experience, however. A nearly equal number had accrued twenty-one or more years experience. The median years of experience for all full time employees was approximately seven. No marked differences appeared among the several geographic regions. These data are summarized in Table 15.

Among the 817 part time staff (teachers and administrators) for whom data were available, the median years of experience was about five years, although 10.4 per cent of the part time personnel had acquired twenty-one or more years overall professional experience. About 13.5 per cent of the personnel had less than one year experience overall. Accordingly, it may be inferred that the American schools attract reasonably experienced personnel among both full time and part time staff (see Table 16).



TABLE 15.--Years of teaching and administrative experience of full time faculty<sup>a</sup> in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
<u>Number of Schools</u>	17	45	28	13	24	127	
<u>Years of Experience:</u>							
Less than 1 yr.	17	155	8	49	30	259	7.1
1-5 years	78	464	201	287	209	1,239	33.7
6-10 years	91	323	214	239	211	1,078	29.3
11-15 years	34	187	86	107	87	501	13.6
16-20	18	132	57	66	44	317	8.6
Over 20 years	10	152	32	44	45	283	7.7
<u>Total Full Time Faculty</u>	248	1,413	598	792	626	3,677	100.0

Source: Form No. FS-573A, pp. 2 and 3.

<sup>a</sup>Administrators included.



TABLE 16.--Years of teaching and administrative experience of part time faculty<sup>a</sup> in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Asia							
Latin America							
Europe							
Africa							
Middle East							
Soviet Union							
Other Countries							
Total							

TABLE 16.--Years of teaching and administrative experience of part time faculty<sup>a</sup> in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
<u>Number of Schools</u>	17	45	28	13	24	127	
<u>Years of Experience:</u>							
Less than 1 year	2	72	10	9	17	110	13.5
1-5 years	17	169	50	35	40	311	38.0
6-10 years	6	90	32	18	26	172	21.1
11-15 years	1	58	19	4	14	96	11.7
16-20 years	2	32	4	1	4	43	5.3
Over 20 years	0	65	12	2	6	85	10.4
<u>Total Part Time Faculty</u>	28	486	127	69	107	817	100.0

Source: Form No. FS-573A, pp. 2 and 3.

<sup>a</sup>Administrators included.

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Certification of Teachers in the American-  
Sponsored Schools Overseas

A teaching certificate is a State issued license in the United States that entitles the certificated or licensed individual to teach in the public schools of the license issuing state. United States teaching certificates are not uniform throughout the United States. In general, they provide for an aggregation of professional training at the collegiate level over and above the academic subject requirements for college graduation. In some states, however, completion of a four year college degree program still is not required for teacher certification, particularly of elementary school teachers. However, in most states certification is contingent upon successful completion of a four or more years college training program.

No licenses to teach typically are required by the host country of teacher employees in American-sponsored schools overseas. The schools are private and, as in many private schools in the United States, individual teaching certificates are not always required as a condition of employment in those institutions. Nonetheless, the incidence of United States certificated personnel among American school employees is a rough indicator of the quality of such personnel (as compared to comparable teaching positions in the United States).

In 1968-69, with 127 schools reporting, 42 per cent of the 4,554 full and part time professional employees

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(teachers and administrators) in the overseas schools held United States teaching credentials or certificates. This included 1,778 of the full time personnel, and 141 of the part time personnel. Of United States teachers employed in the American schools overseas, 70 per cent were licensed to teach in one or more states of the United States. In addition, sixty-eight host and third country nationals were qualified and licensed to teach in the United States, or approximately 3 1/2 per cent of non-United States teachers employed in the American overseas schools in 1968-69. Schools in the American Republics, because of their high employment of host country teachers, tended to have the least proportion of United States certificated personnel in employment. Small schools tended to have the highest proportion of certificated teachers, but they also had a higher proportion of United States teachers among total personnel. These data are summarized in Tables 17 and 18.

Compensation of Teachers in American-  
Sponsored Schools Overseas

The median compensation<sup>7</sup> for full time classroom teachers in the 128 overseas schools was estimated to be \$4,388 in 1968-69. The median differed however by nationality of teacher, by region of the world, and by size of school enrollment.<sup>8</sup>

United States teachers in the 128 American-sponsored schools received a median compensation of \$5,000 in 1968-69.



TABLE 17.--Number of faculty<sup>a</sup> with United States certification in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Line Total	Group Total	Per Cent
<u>Number of Schools</u>	17	45	28	13	24		127	
<u>US Certification:</u>	144	619	315	451	390		1,919	42.1
(Per Cent of Total Faculty)	(50.9%)	(32.0%)	(42.9%)	(52.0%)	(53.2%)			
Full Time	133	562	286	427	370	1,778		
Part Time	11	57	29	24	20	141		
<u>Not US Certified:</u>	139	1,317	420	416	343		2,635	57.9
(Per Cent of Total Faculty)	(49.1%)	(68.0%)	(67.1%)	(48.0%)	(46.8%)			
Full Time	121	854	316	369	256	1,916		
Part Time	18	463	104	47	87	719		
<u>Total Faculty<sup>a</sup></u>	283	1,936	735	867	733		4,554	100.0

Source: Form No. FS-573A, pp. 2 and 3.

<sup>a</sup>Administrators included.



TABLE 18. -- Certification of classroom teachers (full time) in the American-sponsored schools overseas and by country origin: 1968-69.

TABLE 18.--Certification of classroom teachers (full time) in the American-sponsored schools overseas and by country origin: 1968-69.

Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total
<u>Number of Schools</u>	28	23	19	15	27	15	127
<u>Certification:</u>							
<u>US Teachers:</u>							
US Certified	60	104	127	149	443	508	1,391
Other Certification	2	--	2	3	7	7	21
Non-Certified	13	18	40	41	148	170	430
							1,842
<u>Host Country National Teachers:</u>							
US Certified	1	4	6	4	14	19	48
Other Certification	5	37	40	31	193	313	619
Non-Certified	4	9	27	36	107	122	305
							972
<u>Third Country Teachers:</u>							
US Certified	--	2	--	--	10	8	20
Other Certification	13	40	46	21	104	27	251
Non-Certified	9	5	20	8	47	41	130
							401
<u>Teacher Total</u>	107	219	308	293	1,073	1,215	3,215

Source: Form No. FS-573A, p. 2.

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Host country nationals received \$2,700, and third country nationals received \$4,200. All teachers were better compensated in Africa, Europe, Near East South Asia and East Asia than in the American Republics. The median United States teacher compensation was highest in Africa at \$5,400, and lowest in the American Republics at \$4,400. The highest median compensation for host country nationals also was in Africa, the lowest in East Asia, at \$1,800. The median compensation for third country nationals was highest in Europe at \$4,800, and lowest in the American Republics at \$3,500. These two-way relationships are summarized in Table 19.

Median compensation was highest for United States teachers in the twenty-three schools that enrolled 100-199 pupils in 1968-69. However, the median compensation among classes of schools enrolling 200 to 2,500 differed by only \$300. Schools enrolling fewer than 100 pupils, however, compensated United States teachers an average of only \$4,500. Clearly, United States teachers in the American-sponsored schools were undercompensated in relation to their peers in the United States.<sup>9</sup> Moreover, they were compensated at different levels depending upon the size of the institution in which they taught and the region of the globe in which they resided.

Host country nationals were compensated at different median rates in schools of varying size, as well. They were



TABLE 19.--Compensation of full time classroom teachers in the American-sponsored schools overseas by geographic region and country origin: 1968-69.

Region	Africa			American Republics			Europe			East Asia			Near East S. Asia			Group Total (Per Cent)		
Number of Schools	17			46			28			13			24			128		
Compensation in Dollars:	US <sup>a</sup>	H <sup>b</sup>	TC <sup>c</sup>	US	H	TC	US	H	TC	US	H	TC	US	H	TC	US	HOST	TC
1,000 and Under	--	--	--	1	58	2	--	1	--	--	17	--	1	20	--	2	96	2
1,100-2,000	--	2	1	14	136	15	1	5	1	20	82	5	5	13	5	40	238	27
2,100-3,000	9	--	11	87	146	22	9	4	15	17	32	5	13	20	16	135	202	69
3,100-4,000	20	1	13	126	116	28	29	26	23	55	17	15	49	23	23	279	183	102
4,100-5,000	29	3	24	147	81	20	117	24	32	108	13	19	77	6	9	478	127	104
5,100-6,000	38	4	8	114	47	11	84	11	29	123	9	8	122	8	14	481	79	70
6,100-7,000	17	--	2	45	2	4	42	6	15	43	1	8	51	2	2	198	11	31
7,100-8,000	5	--	2	15	--	1	18	4	3	24	--	1	20	--	1	82	4	8
8,100-9,000	5	--	--	12	1	--	10	2	2	25	--	2	15	--	1	67	3	5
9,100-10,000	4	--	--	6	--	--	3	--	2	18	2	1	9	--	--	40	2	3
Over 10,000	12	--	--	2	--	--	1	--	--	14	--	--	15	--	--	44	--	--
Total	139	10	61	569	587	103	314	83	122	447	173	64	377	92	71	1,846	945	421
M-median	M-5,400	M-4,700	M-4,300	M-4,400	M-2,700	M-3,500	M-5,100	M-4,300	M-4,800	M-5,100	M-1,800	M-4,550	M-5,300	M-2,750	M-3,700	M-5,000	M-2,700	M-4,200

Source: Form FS-573A, p. 2.

<sup>a</sup>United States teachers.

<sup>b</sup>Host country national teachers.

<sup>c</sup>Third country national teachers.

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paid \$3,600 in the twenty-seven schools that enrolled 500-999 pupils, and \$1,700 in the twenty-eight schools that enrolled fewer than 100 pupils. Similarly, third country nationals were compensated an average of \$4,600 in the fifteen largest schools and less than \$4,400 in smaller schools. These data are summarized in Table 20.

While these salary and compensation levels evidently are low, Luebke reports that the rate of increase in personnel compensation in a sample of overseas schools was greater than that for comparable schools in the United States between 1967-68 and 1968-69. He concluded, however, that "overseas schools, particularly at 'hardship posts,' must continue to increase salary levels if they hope to remain competitive in the United States teacher market."<sup>10</sup> This position was borne out by King's findings among American-sponsored schools in 1967-68. In 39 per cent of the schools, directors reported that they were limited in their ability to attract fully qualified United States teachers.<sup>11</sup> Salaries of United States teachers in 65 per cent of the schools also were reported to be considerably lower than those of other Americans in the host country.<sup>12</sup> This occurred despite the fact that Federal supported grant positions overseas for United States teachers were higher paid in 51 per cent of the schools than comparable positions within the schools that were funded solely from non-government sources.<sup>13</sup>





TABLE 20.--Compensation of full time classroom teachers in the American-sponsored schools overseas by country origin and school size: 1968-69.

School Enrollment	Under 100			100-199			200-299			300-499			500-999			1,000 & Over			Group Total (Per Cent)		
Number of Schools	28			23			19			16			27			15			128		
Compensation in Dollars:	US <sup>a</sup>	H <sup>b</sup>	TC <sup>c</sup>	US	H	TC	US	H	TC	US	H	TC	US	H	TC	US	H	TC	US	H	TC
1,000 and Under	2	2	1	--	3	--	--	13	--	--	24	1	--	20	--	--	34	--	2	96	2
1,100-2,000	3	7	2	3	18	4	3	10	4	7	14	7	2	22	2	22	167	8	(0.1%)	(10.2%)	(0.5%)
2,100-3,000	13	1	5	9	9	8	11	20	7	21	15	15	28	59	24	53	98	10	40	238	27
3,100-4,000	19	2	6	8	10	13	43	14	16	42	12	18	89	94	37	78	51	12	(2.2%)	(25.2%)	(6.4%)
4,100-5,000	19	1	5	26	--	12	34	7	25	47	6	9	166	71	39	186	42	14	135	202	69
5,100-6,000	6	--	3	43	--	5	30	4	11	38	3	5	160	31	29	204	41	17	(7.3%)	(21.4%)	(16.4%)
6,100-7,000	6	--	--	20	--	4	13	--	2	13	1	1	77	7	15	69	3	9	279	183	102
7,100-8,000	2	--	--	3	--	1	11	--	3	4	--	--	36	4	4	26	--	--	(15.1%)	(19.4%)	(24.2%)
8,100-9,000	3	--	--	3	--	--	9	--	--	7	--	--	16	3	3	29	--	2	478	127	104
9,100-10,000	1	--	--	3	--	--	6	--	--	6	--	--	11	2	2	13	--	1	(25.9%)	(13.4%)	(24.7%)
Over 10,000	2	--	--	4	--	--	9	--	--	12	--	--	6	--	--	11	--	--	(26.1%)	(8.3%)	(16.6%)
Teacher Totals	76	13	22	122	40	47	169	68	68	197	75	56	591	313	155	691	436	73	198	11	31
																			(10.7%)	(1.2%)	(3.3%)
																			(4.4%)	(0.4%)	(1.9%)
																			67	3	5
																			(3.6%)	(0.3%)	(1.2%)
																			40	2	3
																			(2.2%)	(0.2%)	(0.7%)
																			44	--	--
																			(2.4%)	--	--
																			1,846	945	421
																			M-5,000	M-2,700	M-4,200
																			M-4,600		
																			M-5,100	M-2,200	
																			M-4,400		
																			M-3,600		
																			M-5,100		
																			M-4,800		
																			M-1,900		
																			M-3,350		
																			M-4,350		
																			M-2,700		
																			M-5,000		
																			M-4,000		
																			M-1,900		
																			M-5,500		
																			M-3,800		
																			M-1,700		
																			M-4,150		
																			M-Median		

Source: Form No. FS-573A, p. 2.

<sup>a</sup> United States teachers.

<sup>b</sup> Host country national teachers.

<sup>c</sup> Third country national teachers.

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### Teacher Turnover

King<sup>14</sup> examined the amount of turnover among United States teachers in a sample of twenty-two overseas American-sponsored schools. The years studied were: 1966-67 and 1967-68. His sample included 605 teachers who were identified on the roster of the twenty-two schools in 1966-67 and 614 teachers in 1967-68. The difference between the number of teachers in 1967-68 and those who appeared on both the 1966-67 and 1967-68 rosters was the basis for calculating a per cent of teacher turnover in those schools.

The per cent of turnover reported for those years was 47.3 per cent of all United States teachers in the twenty-two sample schools. Variance among regions was wide. In Africa: 58.3 per cent; in the American Republics: 43.6 per cent; in Europe: 48.1 per cent; in the Far East: 45.9 per cent; in the Near East and South Asia, 50.0 per cent.

Since the overseas school depends largely upon the United States teachers in its faculty to attain and maintain excellence in instruction (by United States standards), such high rates of turnover among United States teachers can only have a destructive effect upon the schools' programs. Fortunately, turnover among qualified local teachers is much less. These data have not been compiled systematically, but are consistent with verbal reports from regional education officers on the scene.

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Curriculum and Instruction

Orr<sup>15</sup> studied and classified curricular programs in Mexican, Central American, and South American schools. Although these are not representative of all the American-sponsored schools in other regions, they are widely diverse hence representative of the several curricular organizations that seem to be feasible for American-sponsored schools to develop. Orr reports,

Curricula can generally be classified in four distinct types: (1) a basic Latin American program, now offered in six schools; (2) a basic United States program, which seven schools follow; (3) dual curricula (characterized by the teaching of the same subject in two languages) of which there are nine schools, and (4) the blended or integrated curriculum which includes requirements of Latin American and United States programs but does not duplicate subject matter instruction in two languages. One school can definitely be identified in this latter category. Several of the third category, i.e., dual curricula, have made some discernible progress toward integration.

Schools in other geographic areas principally offer the Orr "type 2" curriculum, namely: "a basic United States program" with a few embellishments. Luebke<sup>16</sup> noted the lack of diversity and development among schools overall. Lambert confirmed the observation in sub-Sahara Africa, and noted also the difficulties in curriculum development there due largely to the number of very small schools.<sup>17</sup> McGowan<sup>18</sup> while examining school facilities in East Asia noted the lack of originality and diversity in school programs of American-sponsored schools there. Hansen<sup>19</sup> observed limited program offerings in his survey of African schools.

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### Pupil/Teacher Ratios

Most pupil/classroom teacher ratios in the American-sponsored schools are low in relation to those reported for public schools in the United States. In 1968-69 the median ratio for the 128 schools under study was approximately thirteen, as contrasted with twenty-five in the United States in that year and over thirty in the large city schools of the United States (see Table 21).<sup>20</sup> In general, larger schools reported a higher median teacher/pupil ratio, as did the schools in the American Republics (see Table 22).

### Non-Instructional Programs and Personnel

Supplementary service programs among the 128 American-sponsored schools, however, are limited. In 1968-69 there were 120 full time equivalent librarians in the 128 schools (see Table 23). However, seventy-five of these were located in the forty-two schools that enrolled 500 or more pupils (see Table 24, columns five and six). Among the fifty-one schools that enrolled fewer than 200 pupils, only eleven librarians were employed (see Table 24, columns one and two).

Curriculum coordinators or supervisors were in short supply, also. Only twenty-eight were employed for the 3,560 full time equivalent teachers of the 128 schools (see Table 23, row C). Two instructional supervisors were employed in the fifty-one schools that enrolled fewer than 200 pupils; the remainder were employed in those schools



TABLE 21.--Pupil/classroom teacher (full time equivalent) ratio in the American-sponsored schools overseas by school size: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and Over	Total	Per Cent
Number of Schools	28	23	19	16	27	15	128	100.0
Pupil/Classroom Teacher:								
Less than 5	--	--	--	--	--	--	--	--
5 - 9	9	2	2	--	--	--	13	10.3
10 - 14	16	13	12	6	9	3	59	46.2
15 - 19	2	8	3	8	9	7	37	28.9
20 - 24	1	--	1	2	7	5	16	12.3
25 - 29	--	--	--	--	2	--	2	1.6
30 and over	--	--	1	--	--	--	1	0.2

Source: Calculated from data in Form No. FS-573, p. 3 and Form No. FS-573A, p. 2.

TABLE 22.--Pupil/classroom teacher (full time equivalent) ratio in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	24	128	100.0
Pupil/Classroom Teacher:							
Less than 5	--	--	--	--	--	--	--
5 - 9	7	--	3	--	3	13	10.1
10 - 14	6	14	19	8	12	59	46.1
15 - 19	3	18	5	4	7	37	28.9
20 - 24	1	11	1	1	2	16	12.5
25 - 29	--	2	--	--	--	2	1.6
30 and over	--	1	--	--	--	1	0.8

Source: Calculated from data in Form No. FS-573, p. 3 and Form No. FS-573A, p. 2.

TABLE 23.--Number of non-instructional personnel (full time equivalent) in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total
Number of Schools	17	46	28	13	24	128
A. Health Services (Doctors, Nurses)	4	7	3	3	7	24
B. Pupil Personnel Services (Guidance, Counseling, etc.)	2	22	9.1	21	11	65.1
C. Curriculum Supervision (Co-ordinators, supervisors)	--	12	4	9	3.5	28.5
D. Audio-Visual Materials Directors	1	1	--	1	1	4
E. Librarians	7.5	44	18	26.5	24	120.0
Total	14.5	86.0	34.1	60.5	46.5	241.6

Source: Form No. FS-573-A, p. 2.



TABLE 24.--Number of non-instructional personnel (full time equivalent) in the American-sponsored schools overseas by school size: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and Over	Total
Number of Schools	28	23	19	16	27	15	128
A. Health Services (Doctors, Nurses)	0.5	--	1.5	6	11.5	4.5	24.0
B. Pupil Personnel Services (Guidance, Counseling, etc.)	--	--	3	4.5	22.6	34	65.1
C. Curriculum Supervision (Co-ordinators, supervisors)	--	2	--	2.5	4.5	19.5	28.5
D. Audio-Visual Materials Directors	--	--	--	1	--	3	4.0
E. Librarians	1	10.5	14.5	17.5	40.3	35.2	120.0
Total	1.5	12.5	19.0	31.5	80.9	96.2	241.6

Source: Form No. FS-573A, p. 2.

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that enrolled 300 or more pupils (see Table 24, columns one and two, and three through six).

The least developed area of service was in audio-visual materials or instructional technology. Only four individuals were employed in 1968-69 to head up this important service area, and these were in the very large schools (see Table 24, row D, columns four and six).

Health, dental, and medical services also were reported to be underdeveloped. Twenty-four individuals were employed in 1968-69 for this function. Fourteen of these were employed in the schools of the American Republics and those of the Near East South Asia (see Table 23, row A, columns two and six).

In 1968-69, pupil personnel officers and counselors were employed in a ratio of approximately one for each 925 pupils.<sup>21</sup> However, these personnel were distributed among the regions of the world (see Table 23) and among schools of different size (see Table 24). Only three counselors were reported among the seventy schools that enroll fewer than 300 pupils, for example, and none for the fifty-one schools enrolling fewer than 200 pupils (see Table 24, row B, columns one through three). Two-thirds of all the counselors in that year were employed by the fifty-nine schools in East Asia and the American Republics (see Table 23, row C, columns two and four).

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### Program Accreditation

Sixty-eight of the 128 schools under study were accredited by the educational authority of the host country, usually the ministry of education of that country's central government (see Table 25). Thirty-two of the schools were accredited by a regional accrediting agency in the United States (see Table 26).

The present day relevance of the accrediting function may be debated in the United States. Nor is it clear that accrediting of American-sponsored schools overseas by United States agencies is fully desirable. It is clear, nonetheless, that accrediting is one measure of school quality, albeit inadequate. As such, it is equally evident that the overseas schools--whether or not by choice --are not offering the diversity or quality of programs and services that invites accreditation by United States agencies. The schools, however, have to a greater degree obtained accreditation of their programs by the national governments in the country in which they are located. The extent of which such accreditation actually reflects program quality is a problem for research. It simply is not known at this time.

Of the thirty-two United States accredited schools overseas, twenty-four or two-thirds are in the American Republics, hence are accredited by the Southern Association of Schools and Colleges, with headquarters in Atlanta,

TABLE 25.--Accreditation by geographic region of the American-sponsored schools overseas: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	24	128	100.0
Accreditation:							
By United States Accrediting Agency	--	24	1	3	4	32	25.0
By Host Government Educational Authority	7	36	10	8	7	68	53.1

Source: Form No. FS-573, p. 1.

TABLE 26.--Accreditation by school size of the American-sponsored schools overseas:  
1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and over	Total	Per Cent
Number of Schools	28	23	19	16	27	15	128	100.0
Accreditation:								
By United States Accrediting Agency	1	--	2	3	15	11	32	25.6
By Host Government Educational Authority	9	10	9	8	19	13	68	53.1

Source: Form No. FS-573, p. 1.

Georgia (see Table 25). This reflects the greater interest by that accrediting agency in extending accrediting services to American-sponsored schools overseas, although other regional agencies now are beginning to show more concern for these overseas schools.<sup>22</sup>

### Governance and Leadership

The American-sponsored school overseas typically is governed by a board of trustees comprised principally by school parents and patrons. These boards seem to be patterned after counterpart boards of private and public schools in the United States. Characteristically they are small. Nearly 70 per cent have fewer than ten members, and 98 per cent have fewer than sixteen members (see Table 27).

Nearly 70 per cent of the board members are United States citizens; about 19 per cent are host country nationals, and about 11 per cent are third country nationals (see Table 28). These distributions do not vary markedly by region of the world, except in the American Republics where 36 per cent of the board members are host country nationals (see Table 28).

United States citizens dominate board membership in 79 per cent of the schools. They account for 100 per cent of board membership in thirty schools and for 50 per cent or more in an additional seventy-one schools. In seven schools, United States members comprise less than 25 per cent of board membership and in nineteen schools less than

TABLE 27.--Number of members on governing boards in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent of School Total
Number of Schools	17	46	28	13	23	127	100.0
No Members on Governing Boards <sup>a</sup> :							
Under 5	--	--	2	--	--	2	1.6
5 - 9	16	30	13	6	21	86	67.7
10 - 15	--	16	11	7	2	36	28.3
Over 15	1	--	2	--	--	3	2.4
Total	17	46	28	13	23	127	100.0

Source: Form No. FS-573, p. 2.

<sup>a</sup>Only elected members with definite term of office. Directors, ex-officio, honorary, associate, alternate, appointed members excluded.

TABLE 28.--Composition of governing board by country origin and geographic regions in the American-sponsored schools overseas: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	23	127	100.0
United States Members	101 (75.4%)	227 (56.5%)	195 (74.1%)	101 (80.2%)	141 (77.9%)	765	69.2
Host Country National Members	12 ( 9.0%)	147 (36.7%)	32 (12.2%)	4 ( 3.1%)	18 ( 9.9%)	213	19.3
Third Country National Members	21 (15.6%)	27 ( 6.7%)	36 (13.7%)	21 (16.7%)	22 (12.2%)	127	11.5
Total	134	401	263	126	181	1,105	100.0

Source: Form No. FS-573, p. 2.

50 per cent but greater than 24 per cent. Statistics are summarized in Table 29.

A plurality of board members comes from the business and industrial community. In 1968-69, about 46 per cent of 1,105 board members were identified with United States, host country, or third country business operations in the host country. About 36 per cent of the board members were representative either of the United States government overseas, the host country government, or the government of a third country. Only 19 per cent of the board members were affiliated with occupations other than those of business or government. Statistics are summarized in Table 30. The vested interest in school control and management by these agencies clearly was manifested in 1968-69.

#### Administrative Leadership

The 124 school directors in the American-sponsored schools overseas in the school year 1968-69 were mixed in their qualifications for leadership. Fifteen per cent held less than a master's degree. Yet, 13 per cent reported that they held an earned doctorate. Little variance in qualifications of school directors was observed among the five geographic regions, however (see Table 31).

School directors as a group were more experienced than their faculties in 1968-69. For example, 47 per cent of the 124 directors had acquired sixteen or more years of professional experience as contrasted with 16 per cent of

TABLE 29.--Per cent of membership of governing board that are United States citizens in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	23	127	100.0
Per Cent United States Membership on Board:							
100%	5	7	6	4	8	30	23.6
50% - 99%	9	23	19	8	12	71	55.9
25% - 49%	2	11	3	1	2	19	15.0
Less than 25%	1	5	--	--	1	7	5.5
Total	17	46	28	13	23	127	100.0

Source: Calculated from Form No. FS-573, p. 2.



TABLE 30.--Composition of governing boards by occupation and country origin in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics			Europe			East Asia			Near East S. Asia			Line Total	Occupation Total	Per Cent
Number of Schools	17	46			28			13			23					
Occupation Classification:																
Member Nationality: US <sup>a</sup> H <sup>b</sup> TC <sup>c</sup>		US	H	TC	US	H	TC	US	H	TC	US	H	TC			
A. Government:	70 8 8	54 17 5			71 7 21			37 -- 9			77 2 8				394	35.7
US	70 -- 1	53 1 --			71 1 --			36 -- 1			76 -- 1			311		
Host	-- 8 2	1 16 --			-- 5 --			1 -- 1			1 2 --			37		
TC	-- -- 5	-- -- 5			-- 1 21			-- -- 7			-- -- 7			46		
B. Business:	21 2 11	143 74 20			98 13 11			34 3 7			46 11 10				504	45.6
US	18 -- 3	132 19 6			81 -- 2			29 1 --			32 1 1			325		
Host	2 2 --	9 48 7			6 6 3			4 2 3			2 10 --			104		
TC	-- -- 2	-- 1 7			2 -- 5			-- -- 3			-- -- 5			25		
Non-Designated	1 -- 6	2 6 --			9 7 1			1 -- 1			12 -- 4			50		
C. Other:	10 2 2	30 56 2			26 12 4			30 1 5			18 5 4				207	18.7
Totals	101 12 21	227 147 27			195 32 36			101 4 21			141 18 22				1,105	100.0

Source: Form No. FS-573, p. 2.

<sup>a</sup>Citizens of United States.

<sup>b</sup>Citizens of host country.

<sup>c</sup>Citizens of a third country.

TABLE 31.--Highest degree earned by heads of schools in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	44	28	13	22	124	
Degree:							
None	--	--	--	1	--	1	0.8
Bachelor	4	4	4	2	4	18	14.5
Master	12	30	20	9	14	85	68.6
Education Specialist	--	1	--	--	--	1	0.8
Doctor	--	9	3	1	3	16	12.9
Teaching Certificate	1	--	--	--	1	2	1.6
Teaching Diploma	--	--	1	--	--	1	0.8
Total	17	44	28	13	22	124	100.0

Source: Form No. FS-573A, p. 2.

their faculties. Only three per cent of the directors (as opposed to 7 per cent of faculties) had accrued less than one year of prior experience. Statistics for school directors are summarized in Table 32; comparisons were made with faculty information reported in Table 15.

This report may be misleading, however, in view of King's careful study of experience among ninety-four school directors in 1967-68. He reports<sup>23</sup> that three-fourths of the directors in that year had held their post in the overseas schools for no more than two years. Moreover, one-fourth of the directors were occupying the very first administrative position of any type. And three-fourths of the directors had four years or less of total overseas experience. The last position held by one-third of the directors was that of a United States teacher. Only ten of the ninety-four directors earlier had been school superintendents, and fourteen school principals.

Accordingly, it would appear that the American-sponsored school may confront a crisis in leadership, brought on by the high rate of turnover among school directors and experienced United States teachers.

Compensation for school directors varied markedly in 1968-69. Nearly 20 per cent of the directors received less than \$8,000 (USCy) annually. About 12 per cent, however, received in excess of \$20,000. The median compensation in 1968-69 was about \$12,300 (see Table 33). By comparison,

TABLE 32.--Number of years of teaching and administrative experience of heads of schools in the American-sponsored schools overseas by geographic origin: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	43	28	13	23	124	
Years of Total Experience:							
1 - 5 years	--	2	--	1	1	4	3.2
6 - 10 years	4	10	8	--	4	26	20.8
11 - 15 years	6	11	6	3	10	36	28.8
16 - 20 years	3	5	9	6	6	29	23.2
Over 20 years	4	15	6	3	2	30	24.0
Total	17	43	29	13	23	125	100.0

Source: Form No. FS-573A, pp. 2 and 3.

TABLE 33.--Compensation<sup>a</sup> earned by school heads in American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	45	28	13	23	126	
Income Range (In Dollars):							
Under \$ 8,000	2	10	4	4	5	25	19.7
8,000- 9,000	1	4	5	--	1	11	8.7
9,100-10,000	1	3	5	--	--	9	7.1
10,100-11,000	--	3	3	1	2	9	7.1
11,100-12,000	1	2	2	--	1	6	4.7
12,100-13,000	1	6	--	1	2	10	7.9
13,100-14,000	1	3	4	--	--	8	6.3
14,100-15,000	2	2	2	1	1	8	6.3
15,100-16,000	1	2	--	1	3	7	5.5
16,100-17,000	--	1	--	1	2	4	3.1
17,100-18,000	2	2	2	1	1	8	6.3
18,100-19,000	2	--	1	1	--	4	3.1
19,100-20,000	--	1	--	--	2	3	2.4
Over 20,000	3	6	1	2	3	15	11.8
School Head Total	17	45	29	13	23	127	100.0

Source: Form No. FS-573A.

<sup>a</sup>Compensation equals salary plus allowances.

elementary and secondary school principals in the United States earned approximately \$12,400 in that year.<sup>24</sup>

Whereas the teachers in the overseas schools clearly were underpaid in relation to salary payments for comparable training, experience, and assignment in the United States, compensation for school directors was not out-of-line with comparable positions in the United States. Indeed, in many of the small overseas schools, the "School Director" is little more than a head teacher of a three, four, or five unit school. At the other extreme, the school director of the five or six largest overseas schools labors under all the complex responsibilities common to the small district superintendency in the United States.

#### Other Administrative Services

In addition to the 124 school directors, the overseas schools also employed 128 other administrators. There were principals, assistant principals, assistant superintendents, and business managers. Most of these administrators were employed by the large schools found in the American Republics, in Europe, and in East Asia. Only eighteen of these were employed in schools enrolling fewer than 500 pupils (see Table 34). In general, the second echelon administrators were not as well prepared as the schools directors. Fifty-two per cent as opposed to 68.6 per cent held an earned doctorate. Nonetheless, the administrators as a group were better prepared than their faculties, as

TABLE 34.--Number of full time administrators<sup>a</sup> (school heads excluded) in the American-sponsored schools overseas by geographic region and school enrollment: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and Over	Total
Number of Schools	28	23	19	16	27	15	128
Africa	--	1	1	3	1	--	6
American Republics	--	1	2	2	23	27	55
Europe	--	--	1	1	16	--	18
East Asia	--	--	--	--	4	24	28
Near East	--	--	3	3	6	9	21
South Asia	--	--	--	--	--	--	--
Total Administrators	--	2	7	9	50	60	128

Source: Form No. FS-573A, p. 2.

<sup>a</sup>Principals, assistant principals, assistant superintendents, business managers.

reported in Table 13. Statistics are summarized in Table 35 and contrasted with those reported for School Directors in Table 31. Moreover, the administrators were compensated fairly if not precisely in accordance with their positions and previous training and experience. Their median compensation in 1968-69 was approximately \$9,250. Although this was about \$3,000 less than the median for school directors, it was double that for teachers (see Table 36). It would seem reasonable to infer that the overseas teachers in 1968-69 were underpaid in relation both to school directors and to second echelon administrators.

#### Financing Overseas Schools

The overseas schools under study employed essentially the same budget categories in their accounting systems as used in the United States. Accordingly, it was possible to make certain gross comparisons between their pattern of expenditure for education and that reported for public schools in the United States for the school year 1968-69.

The combined budget of the 128 schools in 1968-69 was estimated to be \$39.5 million.<sup>25</sup> The proportion of total expenditure allocated to the key budget categories of administration and instruction differed materially in the overseas schools from those reported for the aggregate or average of school districts in the United States for that year. The overseas schools invested 7.4 per cent of total



TABLE 35.--Degrees held by full time administrators (school heads excluded) in the American-sponsored schools overseas by school enrollment: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and Over	Total	Per Cent
Number of Schools	28	23	19	16	27	15	128	
Degree:								
Doctor	--	--	--	--	2	3	5	3.9
Master	--	1	3	5	31	27	67	52.3
Bachelor	--	--	4	3	13	27	47	36.7
Teaching Certificate	--	--	--	1	4	3	8	6.3
Other Degree	--	1	--	--	--	--	1	0.8
Total Administrators	--	2	7	9	50	60	128	100.0

Source: Form No. FS-573A, p. 2.

TABLE 36.--Compensation<sup>a</sup> earned by administrators other than school head in the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	24	128	
Income Range (In Dollars):							
Under \$ 6,000	2	19	1	1	1	24	19.0
6,000- 7,000	1	8	3	1	--	13	10.3
7,100 -8,000	--	5	3	1	2	11	8.7
8,100- 9,000	--	8	2	--	--	10	7.9
9,100-10,000	--	1	1	1	5	8	6.3
10,100-11,000	--	--	3	1	2	6	4.8
11,100-12,000	--	1	1	2	2	6	4.8
12,100-13,000	1	2	3	3	3	12	9.5
13,100-14,000	--	1	1	--	1	3	2.4
14,100-15,000	--	--	3	3	1	7	5.6
15,100-16,000	1	3	1	1	1	7	5.6
16,100-17,000	--	--	1	1	--	2	1.6
17,100-18,000	--	--	2	2	--	4	3.2
Over 18,000	1	3	4	4	1	13	10.3
Total Administrators	6	51	29	21	19	126	100.0

Source: Form No. FS-573, p. 4.

<sup>a</sup>Compensation equals salary plus allowances.

expenditure in Administration (100 series) and 52.1 per cent in Instruction (200 series). All other expenditures were attributed to series 300 through 1400.<sup>26</sup> These largely are not comparable between the overseas schools and domestic schools. On comparable items, the United States public schools invested about 4 per cent of total current expenditure in administration and 72 per cent in instruction.<sup>27</sup>

Clearly, both overseas and domestic schools are labor intensive; that is: they devote the largest proportion of funds to personal services and salaries. Materials, equipment, and capital expenditures are relatively small in relation to personnel costs. Nonetheless, the overseas schools invest a smaller proportion of total expenditure in teacher salaries and instruction than that reported for United States public schools for a comparable period. Teacher salaries (a subset of instructional expenditure) represents only about 39 per cent of total expenditure in the overseas schools as contrasted to about 55 per cent in the United States public schools. In part this can be explained by the fact that the overseas schools must compensate personnel with non-salary items as well as salary in order to recruit them (e.g., transportation, housing, etc.). Moreover, they encounter property rentals for buildings not typically made by United States public schools. Nonetheless, it is fairly clear that the overseas schools under-compensate their teachers in order to cover non-salaried items in their expenditure budgets.

Moreover, the overseas school largely are dependent upon tuition and United States government grants to cover the costs of school operations. In 1968-69, tuition provided less than 50 per cent of total revenue in only nineteen or 14.9 per cent of 128 schools. In 29.7 per cent of the schools, tuition provided 80 per cent or more of total revenue. The median per cent was approximately 71 (see Table 37).

United States dollar support evidently was important to overseas school operations. Approximately \$4.5 million of the \$39.5 million expended in 1968-69 was provided in the form of grants and related assistance by the United States Department of State's Office of Overseas Schools.<sup>28</sup> The larger proportion of United States dollar support, however, came from tuition paid by United States citizens, some of which was subsidized by their government or business employers. Business and industrial corporations provided limited contributions to schools' operating budgets. But, as observed by Leubke: "On a worldwide basis, the United States Government is the single most important source of financial support beyond tuition for schools which meet United States Government criteria for assistance."<sup>29</sup>

The tuition rates charged by the overseas schools vary widely. In general, less tuition is charged for elementary than for secondary school, and for the primary grades within the elementary school. In 1968-69, seventy-two of the ninety-one schools offering Kindergarten in that

TABLE 37.--Percentage of income from tuitions for the American-sponsored schools overseas by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Number of Schools	17	46	28	13	24	128	
Percentage of Total Income:							
Under 40%	2	3	4	--	--	9	7.1
40-49%	3	1	1	1	4	10	7.8
50-59%	4	7	2	--	3	16	12.5
60-69%	3	13	3	3	4	26	20.3
70-79%	4	13	5	4	3	29	22.6
80-89%	1	7	7	2	3	20	15.6
90-99%	--	2	6	3	7	18	14.1
Total	17	46	28	13	24	128	100.0

Source: "Fact Sheets" of the individual schools.

year charged less than \$400 per pupil tuition. One school charged over \$1,000. The median tuition charged by the ninety-one institutions was estimated to be \$272 (see Table 38).

The median tuition was \$610 for grades 1-3 in the 120 schools offering a primary program. For grades 4-6, the median also was \$610. However, the median tuition for grades 7-8 was approximately \$650 (see Table 39). In the ninety-one schools that offered grades 9-12, the median tuition in 1968-69 was approximately \$682. However, thirteen or 14.3 per cent of those schools charged in excess of \$1,000 per pupil and only 25 per cent charged less than \$500 (see Table 40).

#### Strengths and Weaknesses of American-Sponsored Schools Overseas

In light of the status picture portrayed for the American-sponsored schools overseas, the question now is raised: How adequate are these schools for meeting the needs of overseas American elementary and secondary school pupils efficiently and well? In Chapter I, four major objectives were established for these schools if they were to provide equal and adequate educational opportunities for overseas American pupils. These were:

1. Equalize educational services among the diverse schools, regardless of their location, size of enrollment, or extent of isolation.

TABLE 38.--Tuition rates charged in the American-sponsored schools overseas for kindergarten by geographic location: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	All Regions	Per Cent
Tuition Rate in United States Dollar Equivalent:							
Under 200	1	15	3	--	4	23	25.3
200 - 299	3	17	3	3	6	32	35.2
300 - 399	--	7	5	--	5	17	18.6
400 - 499	1	1	4	2	--	8	8.8
500 - 599	--	--	2	1	--	3	3.3
600 - 699	2	1	1	--	--	4	4.4
700 - 799	--	1	--	--	1	2	2.2
800 - 899	--	--	--	--	--	--	--
900 - 999	--	--	--	1	--	1	1.1
Over 1,000	--	--	1	--	--	1	1.1
Total	7	42	19	7	16	91	100.0

Source: Form No. FS-573, p. 4.

TABLE 39.--Tuition rates charged in the American-sponsored schools overseas for grades 1-8 by geographic region: 1968-69.

Region	Africa			American Republics			Europe			East Asia			Near East S. Asia			Total and Per Cent		
Grade Level	1-3	4-6	7-8	1-3	4-6	7-8	1-3	4-6	7-8	1-3	4-6	7-8	1-3	4-6	7-8	1-3	4-6	7-8
Tuition Rate in United States Dollars Equivalent:																		
Under 200	-	-	-	9	7	5	-	-	-	-	-	-	2	1	1	11 ( 9.2)	8 ( 6.6)	6 ( 5.0)
200 - 299	1	-	-	8	5	3	-	-	-	-	-	-	-	1	1	9 ( 7.5)	6 ( 5.0)	4 ( 3.4)
300 - 399	-	1	-	10	11	8	1	1	1	1	1	1	1	1	1	13 (10.8)	15 (12.4)	11 ( 9.2)
400 - 499	-	-	1	4	7	10	4	3	2	2	2	-	-	-	-	10 ( 8.3)	12 ( 9.9)	13 (10.9)
500 - 599	1	2	2	4	4	6	4	5	5	2	2	1	4	4	2	15 (12.5)	17 (14.0)	16 (13.4)
600 - 699	5	5	5	3	3	3	4	4	3	4	4	4	5	5	5	21 (17.5)	21 (17.4)	20 (16.8)
700 - 799	4	4	4	4	4	1	5	5	4	3	3	2	8	9	10	24 (20.0)	25 (20.7)	21 (17.6)
800 - 899	3	3	3	1	1	1	3	2	3	-	-	3	1	1	2	8 ( 6.7)	7 ( 5.8)	12 (10.1)
900 - 999	-	-	-	1	1	1	1	2	1	-	-	-	2	2	1	4 ( 3.3)	5 ( 4.1)	3 ( 2.5)
Over 1000	1	1	1	1	1	5	2	2	5	1	1	1	-	-	1	5 ( 4.2)	5 ( 4.1)	13 (10.9)
Totals	15	16	16	45	44	43	24	24	24	13	13	12	23	24	24	120	121	119

Source: Form No. FS-573, p. 4.



TABLE 40.--Tuition rates charged in the American-sponsored schools overseas for grades 9-12 by geographic region: 1968-69.

Region	Africa	American Republics	Europe	East Asia	Near East S. Asia	Total	Per Cent
Tuition Rate in United States Dollar Equivalent:							
Under 200	-	3	-	-	1	4	4.4
200 - 299	-	1	-	-	1	2	2.2
300 - 399	-	7	1	-	-	8	8.8
400 - 499	-	10	-	-	-	10	11.0
500 - 599	1	5	-	1	-	7	7.7
600 - 699	3	5	2	4	3	17	18.6
700 - 799	-	2	3	2	6	13	14.3
800 - 899	3	1	6	3	1	14	15.4
900 - 999	1	1	-	-	1	3	3.3
Over 1,000	1	4	5	1	2	13	14.3
Totals	9	39	17	11	15	91	100.0

Source: Form No. FS-573, p. 4.

2. Normalize fiscal capacities of the several schools regardless of economic variance in the several geographic regions, to enable them to guarantee equal and adequate educational services.
3. Equalize the educational performance of overseas American pupils with those in comparable schools elsewhere.
4. Build the capability of the school to renew its educational and cultural programs in a timely manner.

Against these objectives, the American-sponsored schools came up short in 1968-69. From the survey of descriptive data presented earlier, it seems evident that the schools have a number of serious weaknesses and deficiencies that must be corrected if each and all of the objectives cited above are to be attained within the foreseeable future.

In the four sections that follow, the descriptive information presented earlier is used as a basis for analyzing the capability of the overseas schools to meet such broad objectives as were posited for them in Chapter I.

#### Strengths and Weaknesses of Educational Services

The American overseas schools enjoy excellent pupil/teacher ratios, as adjudged by common United States

standards. The average overseas classroom teacher works with thirteen pupils, as contrasted with twenty-five in the public schools of the United States. Despite a preponderance of small classes in the overseas schools it is not evident that quality instruction follows from a favorable pupil/teacher ratio. Indeed, the extent of preparation of overseas school teachers overall is fairly low, due to the high incidence of underprepared non-United States teachers in faculties (see Table 12). The United States teachers, however, are as well prepared on the average as teachers in the United States schools. About one-third hold masters or doctors degrees, for example (see Table 12). Regretably, nearly one-half of these teachers leave the schools each year.<sup>30</sup> Accordingly, it is not feasible for most American-sponsored schools overseas to take advantage of their favorable teacher pupil ratios for purposes of improved instruction.

Size of school, however, is a major limiting factor in the potential effectiveness of the overseas American-sponsored schools. To be sure, the schools have powerful advocates who speak eloquently of their potential for service<sup>31</sup> and for United States policy overseas.<sup>32</sup> Yet the facts as presented earlier also are compelling, namely: (1) most schools are too small to be effective in offering conventional United States type programs at (2) the levels of funding available to them. Forty per cent of the schools

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enroll fewer than 200 pupils, and two-thirds enroll fewer than 500 pupils (see Table 5). Nearly two-thirds of the schools expend less than \$100,000 (USCy) per year for teacher salaries. Only four schools have a salary budget of as much as \$500,000 (see Table 41).

Curriculum and curricular organization among the diverse schools remains stereotyped by modern standards. Most schools offer a limited United States type program (see footnotes 16 through 19). Only in the American Republics has there been systematic attempts to diversify curriculums, and to "blend" United States modes with those of the host country. Even there, as Orr pointed out, only one school has engaged seriously in a bi-national, bi-cultural curriculum, and only three of four others have moved toward such curriculums.<sup>33</sup>

Moreover, the schools have not met (and in some cases have not sought to meet) appropriate accrediting standards, except for those imposed upon them by the educational authority of the host country. Only one-fourth of the schools have been accredited by an appropriate agency in the United States; most of those were located in the American Republics (see Tables 25 and 26).

Related instructional, personnel, and health services in the schools are largely underdeveloped. Only librarians have been employed in numbers approaching adequate standards. Experts in instructional technology are

TABLE 41.--Expenditure for teacher salaries by school enrollment: 1968-69.

School Enrollment	Under 100	100-199	200-299	300-499	500-999	1,000 and Over	All Schools	Per Cent
Number of Schools	28	23	19	16	27	15	128	
Level of Expenditure in United States Dollars:								
Under 100,000	28	23	14	11	3	--	79	61.6
Less than 25,000	20	4	2	1	--	--	27	
25,000-49,999	8	9	1	2	2	--	22	
50,000-74,999	--	8	5	3	--	--	16	
75,000-99,999	--	2	6	5	1	--	14	
100,000-199,999	--	--	5	5	12	4	26	20.3
200,000-299,999	--	--	--	--	8	4	12	9.4
300,000-399,999	--	--	--	--	4	2	6	4.7
400,000-499,999	--	--	--	--	--	1	1	0.8
500,000-599,999	--	--	--	--	--	1	1	0.8
600,000-699,999	--	--	--	--	--	2	2	1.6
700,000-799,999	--	--	--	--	--	--	--	--
800,000-899,999	--	--	--	--	--	--	--	--
900,000-999,999	--	--	--	--	--	1	1	0.8

Source: Form No. FS-573B, p. 2, item 213.

almost non-existent. Counselors are sufficient for only about one-half of the enrolled pupils. There are only twenty-eight curriculum or instructional supervisors for the schools and only twenty-four medical, dental, nursing, or health officers. Moreover, these related service personnel are employed almost exclusively in the larger schools, and are concentrated largely in the schools of the American Republics and East Asia (see Tables 23 and 24).

It may fairly be inferred, therefore, that American-sponsored schools are not now responsive overall to the requirements for equalizing educational services in the major areas of the world. Moreover, great variance exists among the schools within a given geographic area. The potential for serving the basic educational requirements of overseas American elementary and secondary pupils would seem to be limited principally to those forty-two schools that enroll 500 or more pupils, and which are located in the large population areas of the world. Were these schools somehow to be related one to the other in some kind of functional system of schools, it would seem to be possible for them to develop the program capability of providing equal and adequate educational services to the larger proportion of the overseas American pupils. The small schools now have such an ad hoc existence that they would have to be operated almost as "satellites" of a larger, sounder, and more fiscally solvent complex or system of schools to be effective in serving the needs of overseas American pupils.

Strengths and Weaknesses in  
Fiscal Capability

The overseas schools are supported almost exclusively from tuition and minor grants from the Office of Overseas Schools.<sup>34</sup> Moreover, tuition rates vary widely (see Tables 38, 39, and 40). With few exceptions, tuition rates have been kept low in relation to need, principally at the urging of United States parents who dominate the governing boards of the several schools. Only an estimated twenty schools now are deemed to be fiscally sound by Regional Education Officers.<sup>35</sup> Clearly this condition would have to be altered radically if the schools were to be able to support any sensible educational program commensurate with the needs and requirements of overseas American elementary and secondary school pupils. Tuition in all but twenty or twenty-one instances would have to be increased sharply. Reliance upon United States grants to support key personnel should be changed. Since levels of grants are subject to annual review by Congress, no school can plan intelligently for systematic acquisition and retention of personnel that are dependent on such grants for salary support.

Moreover, schools in different geographic regions have different degrees of difficulty in raising funds for school operations. In some areas, to raise tuition sharply may price host country nationals out of the school, hence interfere with the school's program for internationalizing



its student body. Moreover, there are significant differences in the overall economy of world regions, so that the cost to the school in one region may be more to offer the same level or quality of service as a school in another region.<sup>36</sup> Particularly is this evident in the relatively isolated small schools in Africa. These disparities in basic fiscal capability need not only to be addressed with more funds, and more dependable funds, but the distribution of those funds necessarily must take into account the variance in cost of public service in the several world regions.

More money, however, is not all that is required by the overseas schools, if they are to be responsive to the needs of overseas American elementary and secondary school pupils. Changes in school organization and control also may be needed. The small size of most schools prevents any economy of scale in program offerings; moreover, it limits the number and diversity of program offerings available to its pupils. If these schools are to be continued, their unit cost necessarily must be supported at a higher level. At present, these schools tend to "squeeze" teacher salaries in order to cover other school costs.<sup>37</sup> For the long term, services through these schools might be equalized only if the schools can become a dependent unit within a larger administrative system that can spread the high costs of operating small schools in relatively isolated areas over a

broader support base than the parents of the small schools themselves.

Strengths and Weaknesses in  
Pupil Performance

The concept that schools should be held accountable for the results they produce with pupils is relatively new in the United States. The concept demands that the educational performance of different groups of children be normalized, that is: that the academic performance of black pupils overall not be markedly different from that of white pupils, nor migrant pupils from non-migrants, nor rural from urban, etc. Applied to the overseas schools situations, the concept demands that the overall educational performance of pupils in the overseas schools not differ materially from comparable pupils who attend school in the United States.

Although equalizing or normalizing performance of overseas pupils may be a worthy objective for the American-sponsored schools overseas, there are no worldwide data available that would permit an assessment of their strengths and weaknesses in this regard. This situation evidently should be researched.

For the immediate future, therefore, the schools properly may be challenged to meet their "quantity of services" problem first; that is, to develop the capability of offering relevant educational services to a pre-set

standard (as for example: worldwide accreditation standards). The problem of "excellence" (as measured by pupil performance rather than by institutional standards of school services) may properly be deferred in most schools until the quantity problem is addressed satisfactorily. Although this line of reasoning admittedly is argumentative, it is not altogether inappropriate. People concerned with the problem of "shelter" are first concerned that some kind--any kind--of shelter be obtained that promises protection from the elements. The "quality" of that shelter becomes a second order concern. For the large majority of the small, new, and inept American-sponsored schools overseas, the first objective with and for them may be to bring their current educational practices up to the state of the art.

For the forty-two larger schools, and particularly the twenty or so fiscally sound schools among them, more stringent expectations might be appropriate. Once again, intensive new research is needed to examine school effects in these situations. For the two reported cases in which evidence is available, the results are disappointing with respect to this objective.

Patterson<sup>38</sup> studied achievement and related affective factors among United States and Mexican pupils in the American School of Mexico, the oldest, largest, and one of the fiscally solvent of the overseas schools. After correcting for test bias, Patterson found that Mexican

pupils in that school performed at uniformly lower levels of achievement than United States pupils of comparable age, sex, and socio-economic status. Moreover, Patterson found no evidence of significant cultural exchange between Mexican and United States pupils in the schools.

Orr<sup>39</sup> studied the blended curriculum of the Monterrey, Mexico, school, and the attempts of other Latin American community schools to develop similar bi-national and bi-cultural curricula. He concluded that the effort required for such innovation typically was beyond the personnel capability of American-sponsored school faculties then employed, although he idealized the blended curriculum for those schools. Moreover, he pointed out, few governing boards in Latin America are interested in more than a traditional view of American overseas schools.

#### Capability for Institutional Renewal

Opportunities abound in the American-sponsored schools overseas for curriculum and instructional innovations. Almost every professional observer has so concluded.<sup>40</sup> The confrontation of cultures in the overseas schools by definition itself is stimulative of change in conventional United States methods in those schools. Yet, the schools continue to be United States oriented that they do not seem to be sensitive to the locally generated opportunities for instructional or program innovation and improvement. At the same time, they are geographically

isolated from the mainstream of United States educational affairs; accordingly, they are not stimulated by new developments in this country, as well. The prevailing propensity among the schools seems most to be: to transplant and perpetuate a standard "American" curriculum into the overseas situation. The professional staff is supported in this regard by the United States dominated lay boards of control.<sup>41</sup>

Several of these schools now are seeking to overcome their geographic and "psychological" isolation from the mainstream of United States education. New associations have been formed, and interesting new linkages have been established with United States school districts.<sup>42</sup> These are discussed in detail in Chapter III. A more fundamental problem faces the schools in this area however. Too many schools are not attracting or recruiting accomplished "change agents" among their key administrative and teaching staffs. Relatively experienced and frequently inept school directors are employed. Moreover, the turnover among qualified administrators and teachers approaches 50 per cent annually.<sup>43</sup> No systematic program of institutional reform or instructional innovation can be built upon that soft a personnel base.

### Summary and Conclusions

From both primary and secondary sources of information, it is clear that the American-sponsored school

overseas has still underdeveloped potential (1) to demonstrate the best of United States education overseas, (2) to experiment with bi-cultural and bi-national curricula and instructional programs, and (3) to eliminate the inequities in opportunities for quality education presently available to American elementary and secondary school pupils overseas. Also it is clear that some of the schools have attained genuine stature, principally as "American-type" institutions overseas. A few have sought out and taken on a much larger role for themselves. They are actually innovating in educational content and method, so that the opportunities afforded American pupils (as well as host country and third country nationals) in those schools exceed those typically available in the public or private schools in the United States.

Most schools, however, have serious deficiencies that must be overcome before they can respond fully to the educational needs and requirements of overseas American pupils. They are too small. They are economically unsound. Their programs are limited overall. Also, they vary widely by geographic region. Although the quality of United States personnel in some schools is commendably high, turnover among teachers and inexperience among school executives detracts from the potential of such personnel to build sound curricula and to offer attractive and appropriate instructional programs.

In general, it is concluded that the American-sponsored schools overseas fail to constitute a viable functional system of schools in a situation where a system of schools is required. Their independent boards, each concerned principally with local, parochial matter, tend to cherish a certain insularity that mitigates against the schools' participation in a larger systemic effort.

Moreover, the leadership and personnel problem within most schools argues strongly against their ability to perform satisfactorily to a worldwide standard at a time when appropriate and equal services must be guaranteed each American pupil regardless of his place of residence overseas. Hence, it would be unduly optimistic to believe that the schools individually might correct this situation.

While not self-correcting, the overseas situation does not seem to be uncorrectable. What seems to be indicated is a new kind of management strategy for those agencies that purport to help the overseas schools. That strategy, by definition, must at one and the same time: (a) improve individual school capabilities in educational and cultural program performance, and (b) build a viable set of systemic relationships among the several schools that are responsive to the overall needs and requirements of American pupils overseas. A systematic effort is made in Chapter IV to develop such a strategy, based largely upon the successful experiences that have emerged from among the diverse

attempts to assist the American-sponsored schools overseas to date. These varied financial and technical assistance programs are reviewed in detail in Chapter III.



## FOOTNOTES

<sup>1</sup>Criteria for the selection of overseas schools to be supported under Federal legislation are listed in Section 600 of the Foreign Affairs Manual, II (2 FAM 600). Approximately thirty of the 158 schools that qualify for Federal assistance under these regulations are not assisted because they duplicate services provided already by another American-sponsored school at a United States post. In 1968, 128 of the schools were supported. In 1969, 130 schools received a financial grant.

<sup>2</sup>U.S. Department of State, Overseas Schools Questionnaire, Form No. FS-573; U.S. Department of State, Request for Assistance, Form No. FS-574; U.S. Department of State, Information Regarding Professional Staff Members of Overseas Schools, Form No. FS-573A; U.S. Department of State, Overseas Schools Summary Budget Information, Form No. FS-573B; see Appendices C, D, E, and F.

<sup>3</sup>F. Porter Sargent reports that 57.1 per cent of the United States pupil enrollment in non-DOD schools in 1968-69 occurred in the independent, non-profit American-sponsored community operated school overseas.

<sup>4</sup>The American School Foundation, Mexico, D.F., Republic of Mexico, in 1896.

<sup>5</sup>In tabulating data from the FS-573 forms, estimates of total enrollment necessarily vary in accordance with schools' responses to different items. The "official" sum of enrollment in the 128 schools in 1968-69 was 60,398. However, that total varied on certain items from as little as 60,116 to 60,398. Similarly, totals on other items vary, as for example: in Table 2, data are available on ninety-five kindergarten programs. In Table 36, however, data are available for only ninety-one kindergartens.

<sup>6</sup>A "third country national" is here defined as "a citizen residing in a country other than the United States

who is neither a citizen of that country or of the United States." For example: third country nationals in the American International School in New Delhi, India, would be citizens of a country other than India or of the United States of America. Enrolled in that school, for example, are pupils representative of twenty-three nations other than India and the United States.

<sup>7</sup>Compensation is not limited to teacher salary in every instance. It may include subsistence or other payments in lieu of salary to a limited number of United States teachers who have been recruited to one or another overseas schools. For example, 35 per cent of the American-sponsored schools studied by King in 1967-68 provided free housing or housing allowances for United States teachers in that year. King, *Recruitment*, pp. 95-99. From the point of view of the teacher and of the school, the differences may be academic, in that they represent a total cost to the school for personal services and real income to the individual.

<sup>8</sup>Regretably, the data did not permit an examination of a three-way relationship between nationality/region/school enrollment.

<sup>9</sup>Public school teachers in the United States, for example, received a median salary in 1968-69 of \$6,600, according to statistics published by the National Education Association. Mean salary in that year was reported to be \$7,908 for United States teachers. The comparable mean figure for overseas teachers was \$6,749 (as calculated by Paul Luebke, Ranking of the States, 1969 (Washington, D.C.: NEA, 1969), p. 23).

<sup>10</sup>Paul T. Luebke, American Elementary and Secondary Community Schools Abroad (Washington, D.C.: AASA, 1969), p. 14.

<sup>11</sup>Bob King, "The Recruitment, Selection, and Retention of Teachers for Overseas Schools" (unpublished Ph.D. dissertation, Wayne State University, 1968), p. 179.

<sup>12</sup>Ibid., p. 183.

<sup>13</sup>Ibid., p. 160.

<sup>14</sup>Ibid., p. 190.

<sup>15</sup>Paul G. Orr, "Binational Schools in Latin America" (unpublished Ph.D. dissertation, Michigan State University, 1964), pp. 122-127.

<sup>16</sup>Luebke, Community Schools Abroad, p. 28.

<sup>17</sup>Sam M. Lambert, et al., A Study of American Sponsored Secondary Education in Sub-Sahara Africa (Washington, D.C.: U.S. Department of State, Bureau of Educational and Cultural Affairs, 1965).

<sup>18</sup>George W. McGowan, Edith Greer, and Curtis Booker, Educational Facilities for U.S. Government Dependent Children in Southeast Asia (Washington, D.C.: Agency for International Development, 1963).

<sup>19</sup>Kenneth H. Hansen, Elizabeth Boney-Yates, Marlene Futterman, Frank N. Hamblin, and Marian B. Keyser. American Sponsored Schools in Africa (Washington, D.C.: U.S. Department of State, Bureau of Educational and Cultural Affairs, 1964).

<sup>20</sup>Educational Statistics, Fall, 1968 (Washington, D.C.: U.S. Office of Education, Bureau of Educational Statistics, 1969).

<sup>21</sup>Quotient calculated by dividing column 7, row B of Table 23 into 60,398, the number of enrolled pupils reported in Table 4.

<sup>22</sup>This point is discussed further in Chapter 3. However, it should be noted that standards of accrediting agencies other than the Southern Association of Schools and Colleges have not been adapted for application to the American-sponsored schools overseas. Many of those standards are not relevant to the overseas situation. Moreover, the notion itself of United States accrediting of overseas schools has not been accepted uniformly by the overseas schools, particularly by those in Europe.

<sup>23</sup>King, "Recruitment," pp. 192-193.

<sup>24</sup>Extrapolated from 1968-69 salary data published by the National Education Association,

<sup>25</sup>Statistics obtained from the Office of Overseas Schools (Washington, D.C.: U.S. Department of State).



<sup>26</sup>Aggregated from 128 school reports on Form No. FS-573B, 1968-69.

<sup>27</sup>Ranking of the States, 1969,

<sup>28</sup>Statistics secured from the Office of Overseas Schools (Washington, D.C.: U.S. Department of State).

<sup>29</sup>Luebke, Community Schools Abroad, p. 16.

<sup>30</sup>King, "Recruitment," p. 190.

<sup>31</sup>Advocates for supporting American-sponsored schools overseas include: AASA, AAIE, and various colleges and universities that seek to help the schools. Notable among educators who see the "untapped potential" of these schools are Rushton, Engleman, Wilcox, etc. Wilcox, for example, who serves as Associate Secretary of AASA for International Education writes: "American sponsored schools abroad provide valuable 'windows' upon the world and serve as demonstration centers of American education, at the same time that they strive to provide equal educational opportunity for the children of those who represent us in service abroad," Luebke, Community Schools Abroad, p. 6.

<sup>32</sup>The Congress of the United States and the United States Department of State have acknowledged the potential importance of the American-sponsored school overseas as exponents of United States foreign policy. Congress has appropriated approximately \$4.5 million each year since 1962 to support grants to the schools; moreover, it authorized the creation of a special Office of Overseas Schools to administer the program within the United States Department of State. President Johnson accepted the challenge of the American school overseas by citing their importance to him for continued United States government support, Engleman, Mission Called O/OS, p. 7.

<sup>33</sup>Orr, "Binational Schools," p. 123.

<sup>34</sup>Luebke, Community Schools Abroad, p. 16.

<sup>35</sup>As adjudged by the three regional officers in the Office of Overseas Schools, the twenty selected schools are among those forty-two that enroll 500 pupils or more and which consistently have expended \$600 per pupil or more for the past three to five years.

<sup>36</sup>Luebke, Community Schools Abroad, p. 16.

<sup>37</sup>Teacher salaries in American overseas schools represent about 39 per cent of total current operating expenditures as compared to 55 to 60 per cent in the United States public schools. Moreover, salaries uniformly are low.

<sup>38</sup>Charles J. Patterson, A Comparison of Performance of Mexican and American Children in a Bi-Cultural Setting on Measures of Ability, Achievement, and Adjustment (Mexico: American School Foundation Publications, Bulletin No. 30, 1960, based on an unpublished Ph.D. dissertation at Michigan State University, 1960).

<sup>39</sup>Orr, "Binational Schools," p. 212-213.

<sup>40</sup>Edward W. Rushton and Finis E. Engleman reiterate this point in American Sponsored Overseas Schools: A Second Look (Washington, D.C.: American Association of School Administrators, 1969).

<sup>41</sup>Orr, "Binational Schools," p. 213.

<sup>42</sup>Paul T. Luebke and Ernest N. Mannino, "A Rich Resource for International Education," in International Education and Cultural Exchange: 1966 (Washington, D.C.: U.S. Advisory Commission of International Educational and Cultural Exchange, 1966).

<sup>43</sup>King, "Recruitment," pp. 204-205.

## CHAPTER III

### ASSISTANCE PROGRAMS FOR THE AMERICAN- SPONSORED SCHOOLS OVERSEAS

The purpose of this chapter is two-fold, namely: (1) to examine the major financial and related assistance programs for the American-sponsored schools, and (2) to assess these programs for likely future improvement. Specifically, the question is addressed: To what extent are these several programs helping these overseas schools meet the general educational requirements established for those schools in Chapter I? A corollary question also is addressed, namely: What changes, if any, should be made in these programs to increase their potential effectiveness with the American-sponsored school overseas?

#### Sources of Data

Extensive information exists for most assistance programs for the American-sponsored schools, although none has been formally evaluated in depth. At least six major sources were available, however, for use in examining the assistance programs. These were:

1. United States Congressional testimony and "backup" materials prepared by the United States

Department of State, particularly concerning the participation of the United States Government in support of the American-sponsored schools.

2. Materials prepared by the United States Bureau of the Budget (now Office of Management and Budget) employed in the preparation of legislative proposals for support of the American-sponsored schools and in the development of budget items for these schools.
3. Reports on the "School-to-School Programs" by the American Association of School Administrators, and related informal and unpublished materials from member schools in those programs.
4. Official reports by and informal intelligence from the International Schools Service of New York, particularly concerning its program of recruiting staff for the American-sponsored schools.
5. Reports from coordinators of the "University-to-School Programs" on the effectiveness of in-service personnel development programs.
6. Miscellaneous documentation, including doctoral theses and individual reports of experts and others who have studied the schools from time to time, and on-site reports by Regional Education Officers of the United States Department of State's Office of Overseas Schools.



These documents were employed as a basis to describe the variety of assistance programs, and wherever feasible to provide the insights and documentation for assessing the effectiveness and efficiency of those programs, as well. It was not feasible within the limitations of this study, however, independently and formally to evaluate the educational outputs of the several and diverse programs. This task could most readily be accomplished by a competent commission established for that purpose. Evaluative judgments nonetheless are constructed in this chapter. These judgments follow from an examination of the potential of assistance programs for helping the American-sponsored schools meet certain basic objectives in the education of American elementary and secondary pupils overseas.

For convenience in discussion, the several assistance programs have been grouped under four major headings. These are: (1) financial assistance programs, (2) technical assistance and personnel development programs, (3) related service programs, and (4) self-help programs.

Each of these is discussed in the pages that follow.

#### Financial Assistance Programs

Two major United States groups have consistently provided limited financial support to the American-sponsored schools overseas. Principal among these has been the United States Government, particularly through the United States Department of State and its subsidiary units and agencies.

Historically, United States business firms also have been involved in supporting individual schools; most recently, business and industrial corporations have joined with the United States Government to form a council through which to subscribe funds for the American-sponsored schools on a systematic basis. The United States government grant support for the American-sponsored schools provides about 12 per cent of the total funds budgeted by the several schools annually; private business investment as yet represents less than 4 per cent of the non-tuition revenue available to the schools. However, substantial school support is provided by United States business and industrial corporations through its educational allowances to overseas employees who then pay tuition to the schools to enroll their children.

History, Objectives, and Status of United  
States Government Programs<sup>1</sup>

The United States Government has, since 1944, directly involved one or more of its agencies in assisting the private, independent, American-sponsored schools overseas. The rationale upon which the government has built its support programs is two-fold, namely: (1) the schools serve dependent American children overseas. The United States government supports dependent children overseas for many of its Foreign Service officers and allied government employees, hence properly can assist the American-sponsored

schools; (2) The schools also serve to strengthen mutual understanding between the people of the United States and those of other nations. It is the formal policy of the United States that such mutual understanding be fostered by all legitimate means. Hence, the government can assist the schools discharge this function, as well.

The specific legislation upon which financial support for the schools rests also is two-fold, namely: (1) funding is authorized for support of dependent children overseas, under the Foreign Assistance Act of 1961, as amended, and under the Foreign Service Act of 1946, as amended; (2) funds to support programs for promoting mutual understanding are authorized under the Mutual Educational and Cultural Exchange Act of 1961, as amended.

#### The Office of Overseas Schools

This office was established within the United States Department of State in July, 1964, under the Deputy Under Secretary of State for Administration. Its purpose was to bring the three aforementioned legislative programs under one administrative umbrella for optimum coordination. A director for the Office was authorized. He is responsible to an Overseas Schools Policy Committee that includes: the Deputy Under Secretary of State for Administration or the Assistant Secretary of State for Administration, the Assistant Secretary of State for Educational and Cultural Affairs, and the AID Assistant Administrator for Administration.<sup>2</sup>

The Office is authorized to make financial grants to those American-sponsored schools overseas that meet specific criteria established in Section 600 of the Foreign Affairs Manual, Volume II (2 FAM 600). These administrative criteria are responsive to the enabling legislation. For example, to qualify for assistance under the Mutual Educational and Cultural Exchange Act of 1961, as amended, a school must be open to qualified American students, and be operated or sponsored by United States citizens or non-profit institution(s), with or without the participation of nationals of the host country. The school also must be non-political, non-ideological, non-church related, and organized not for profit. It must have a competent board that is authorized under an appropriate charter or by-laws to own and operate the school. The school should employ a United States director, whenever possible, and sufficient numbers of United States teachers to support a good quality program based on accepted United States educational theory and practice. English is the preferred language of instruction; however, the school also should give evidence that its programs promote mutual understanding with host country citizens and institutions.<sup>3</sup>

Eligibility under provisions both for AID and United States Department of State legislation includes the following:

1. There are sufficient numbers of dependent children at post to represent an established need for dependent education.

2. There is evidence of local support on the part of the United States, local and other foreign communities at post.
3. There is evidence that there are available sufficient numbers of qualified and interested persons, including American citizens, to provide proper policy, financial, and administrative guidance to the schools.
4. English is the primary language of instruction.
5. To the extent practical under existing local conditions, the school follows a fundamentally American curriculum and American teaching methods and uses American textbooks and reference materials.
6. Academic standards, including teacher qualifications, are comparable to those in American schools.
7. There is a policy of admitting all dependents of United States Government employees who otherwise meet the school's admission standards.
8. There is evidence that the school will ultimately be able to cover ordinary recurring operating expenses from tuition or other school income other than United States Government grants.
9. There is evidence that there is no other feasible means currently available to the school for adequately financing expenditures necessary for the education of Government dependents."<sup>4</sup>

#### History of Government Support

The United States Government began direct financial aid to certain American-sponsored schools in Latin America in 1944. Nelson A. Rockefeller, then Coordinator for Inter-American Affairs, was concerned by the growth in influence of certain German national schools in Latin America during World War II. His testimony was influential in Congress

appropriating \$220,000 in 1944 to enable a small group of schools in Central and South America to provide instructional programs patterned after American educational practices.<sup>5</sup> Luebke reports:

This assistance continued under the program of the Coordinator for Inter-American Affairs until, with the passage of the United States Information and Educational Act of 1948, it became a part of the so-called "Smith-Mundt Program." Funds made available for assistance to the American-sponsored schools were administered by the Inter-American Schools Service, a contract agency operating under the auspices of the American Council on Education (ACE). Assistance was provided primarily to supplement salaries of American teachers employed in the schools and to purchase educational materials and equipment.<sup>6</sup>

The Government assistance program was expanded in 1957 through provisions of Public Law 480 that established reservoirs of local currencies in several nations from the sale to those countries of surplus United States commodities. For a brief period, American-sponsored schools were enabled to obtain these funds both for capital expansion and current operation, particularly salary supplements. However, in 1962, participation by American-sponsored schools in the P. L. 480 funds was limited to the seven countries in which the amount of P. L. 480 funds exceeded that required to support United States Government operational requirements in those countries.

By 1964, Luebke observed:

There were three separate programs for providing direct assistance to American-sponsored elementary and secondary schools abroad. These were: (a) the American-Sponsored Schools Branch of the Bureau of Educational and Cultural Affairs of the Department of

State, (b) the Dependent Schools Branch of the Agency for International Development, and (c) the Dependent Education Program of the Bureau of Administration of the Department of State.<sup>7</sup>

It was from the necessity to coordinate the activities of these three agencies and their legislative programs that the Office of Overseas Schools and its Policy Committee were established, at the suggestion of the Bureau of the Budget in 1964.

In 1969, the Office of Overseas Schools awarded grants to 130 American-sponsored schools overseas in an amount of approximately \$4,800,000. The grants ranged in magnitude from \$200 to the International School, Rangoon, Burma, to \$335,000 to the American School of Rio de Janeiro, Rio de Janeiro, Brazil. The median grant<sup>8</sup> was \$21,000.

About 58 per cent of the funds were awarded for staff development projects, including salary supplements, and inservice education. The sum of \$511,800 or 10.6 per cent was awarded for the purchasing of educational materials for use in the American-sponsored schools. Student scholarships were supported at a level of \$341,500, or 7 per cent of the funds. Construction of school facilities received \$977,500, or 19.9 per cent, and the balance of \$188,000 was utilized for certain "worldwide" projects and programs. The latter included:

1. Contractual services from the International Schools Services.

2. Contractual services from the American Association of School Administrators.
3. Contractual services from the Institute for the Development of Educational Activities (IDEA).
4. Assistance "in kind" to the several schools, and
5. Program support funding.

The amounts of dollars available to the American-sponsored schools have varied since the inception of government programs in 1944. Between 1944 and 1962, an aggregate of \$11,051,000 was provided from the diverse Federal assistance acts. Detailed information is available for 1962 and thereafter. In Table 42, estimates of funds available annually since 1962 from the several basic sources are summarized.

The aggregate estimated expenditure from 1944-1970 by the United States government in direct or indirect support of American-sponsored schools (exclusive of education allowances to United States government employees or contract employees overseas) was \$56,698,000. The level of support these funds provided has declined from a high of \$6.0 million in 1963. The total, although lower, has remained rather stable since 1965. The total amount of support for 1969-70 translates to approximately \$8 for each of the sixty odd thousand enrollees in the overseas schools in that year, or approximately \$156 for each of the 31,194 United States pupils enrolled in the schools. Although the



TABLE 42.--United States Government assistance for American-sponsored schools overseas by source of funding: 1962-70.  
(In Thousands of Dollars)

Year	Source of Funding			All Sources
	1 <sup>a</sup>	2 <sup>b</sup>	3 <sup>c</sup>	
1962	2,098	1,400	--	3,498
1963	3,384	2,701	--	6,085
1964	4,010	1,715	--	5,725
1965	3,173	1,500	156	4,829
1966	2,952	1,598	450	5,000
1967	2,900	1,909	650	5,459
1968	2,053	2,718	646	5,417
1969	1,600	2,601	693	4,894
1970	1,600	2,500	640	4,740
Total	23,770	18,642	3,235	45,647

<sup>a</sup>Twenty-two USC 501, pp. 4488, Authority for Coordinator of Inter-American Affairs to commence aid to schools in Latin America in 1942; United States Information and Educational Exchange Act of 1948, as amended; Agricultural Trade Development and Assistance Act of 1954, as amended; Mutual Educational and Cultural Exchange Act of 1961, as amended.

<sup>b</sup>Mutual Security Act of 1954, as amended; Foreign Assistance Act of 1961, as amended.

<sup>c</sup>Foreign Service Act of 1946, as amended.

total number of dollars has remained fairly constant during the period, the level of per pupil support has declined since 1965 because of increased enrollments in the schools. Government support per pupil for the period of 1963 and 1970 is summarized in Table 43.

TABLE 43.--Revenue per pupil from all United States government sources: 1962-69. (In Hundreds of Dollars)

Year	(1) Total Enrollment	(2) United States Pupil Enrollment	(3) Total United States Grant Revenue	(4) Revenue/ Enrolled Pupil (4÷1)	(5) Revenue/ United States Pupil (4÷2)
1963-64	35,684	28,578	6,086,001	170	327
1964-65	40,122	22,293	5,725,000	142	256
1965-66	46,248	26,843	4,829,000	104	179
1966-67	53,469	29,447	5,000,220	93	169
1967-68	56,081	31,131	5,459,441	97	175
1968-69	60,398	33,725	5,416,780	89	160
1969-70	60,087	31,194	4,894,142	81	156

Source: Foreign Service Form 573 and Table 42.

Note:

Estimates of total revenue are documented and substantially accurate for these years; however, estimates of enrollment are those provided by the schools themselves without outside validation. Some variance in enrollment occurs also because of differences in schools that participate from year to year.

In addition to direct grants to schools, the Office of Overseas Schools also provided categorical grants to agencies and institutions in the United States that provide technical or related assistance services to (or on behalf of) the schools. These are discussed later and include: (1) the school-to-school program, (2) the university-to-school program, (3) recruiting and related services by the International Schools Service under contract with the Office of Overseas Schools, and (4) individual consultants and contract studies.

In 1969, a total of \$579,860 was expended by the Office for these service programs. Approximately \$128,000 of the total amount was expended to support inservice training programs in the overseas schools through the university-to-school program. The sum of \$268,610 was expended in support of the school-to-school program, and an additional \$139,750 was expended under contract with the International Schools Service and grants to schools for recruiting service. From the Office's own internal salaries and expense budget, an estimated additional \$300,000 was expended to provide direct technical and related assistance to the schools by the Office's own Regional Education Officers, certain outside consultants, and other experts.

Assistance by United States Business and  
Industrial Corporations

Historically, United States business firms were supportive of American-sponsored schools overseas long

before the United States Government.<sup>9</sup> It was at the insistence of business executives that many of the schools were established.<sup>10</sup> Today, business executives serve on governing boards of the schools and in a variety of ways assist the schools.

Most business firms provide education allowances for school age children of their key employees overseas. As many as one-third of the American pupils enrolled in the American-sponsored schools come from these families (see Table 7). Their tuition is a stable part of the basic financial support of the schools.

Direct business grants to the schools--over and beyond the tuition funds--have not been accepted as standard procedure by most United States firms with branches or subsidiaries overseas. Financial assistance of this type has been limited largely to the schools in large population centers. The assistance typically has been for school plant renovation or expansion. Local representatives of the United States parent industry or business contributed to local school-initiated fund raising drives to benefit the local school. Decisions to make modest contributions of this type typically are left to the discretion of the local manager overseas. Some firms, as a matter of policy, limit gifts by local managers.

Not until very recently has there been any attempt to involve United States private firms systematically in a program of regular support for the American-sponsored

schools. Some of the initiative for this was undertaken by the Association of American Schools in the Republic of Mexico. In 1964 that group of seven school directors pioneered a subscription program that ultimately approached some eighty United States firms with operations in Mexico. The Association's program itself was not successful, due to its inability to maintain a full time professional director, but it laid the basis upon which a similar program later was undertaken successfully by the American School Foundation of Mexico for its school in the capital city.<sup>11</sup> In that program, regular grants of approximately \$5,000 (USCy) each were successfully solicited from about forty United States firms with offices in Mexico City and its immediate environs. Funds to "seed" this fund raising activity were provided by the Ford Motor Company of Detroit, Michigan, whose senior executive in Mexico was closely affiliated with the American School there. The fund raising operation in 1966 was extended successfully to Mexican corporations as well.<sup>12</sup>

Through leadership from the Office of Overseas Schools, the experience gained in the Mexico experiment was applied to a nationwide endeavor on behalf of the American-sponsored schools. At the instigation of the Honorable Dean Rusk, then Secretary of State, an Overseas School Advisory Council was established (see Appendix H) to provide the impetus and leadership on the part of government and business executives to involve United States companies with

a stake in overseas operations seriously in the support of the American-sponsored schools on more than an ad hoc basis. The Council, created officially on March 1, 1967 now has three principal objectives.<sup>13</sup> These are: (1) to make all United States companies who have employees with children overseas aware of the problems facing the American-sponsored schools, and to suggest to them the kind of support that should be made to the schools by United States business and United States government, on a "fair share" basis; (2) to stimulate self-help fund raising programs; and (3) to stimulate the setting of realistic tuition rates (normally, this means to raise them) to meet rising operating costs in the schools.

The Council has in its membership a number of the nation's distinguished business leaders, among whom are:

A. Marvin Braverman	Attorney and Counselor at Law	Washington, D.C.
C. M. Bass	Director, Organ- ization & Per- sonnel Dept.	Gulf Oil Corpora- tion
Norman P. Blake	Senior Vice President	Pan American Air- ways
Harrison F. Dunning	Chairman of the Board	Scott Paper Company
Gordon Gilmore	Vice President for Public Relations	Trans World Airways
E. S. Groo	Vice President	IBM World Trade Corporation
John Holmes, Jr.	Director of Personnel	General Motors Overseas Opera- tions

Eugene R. Lopez	Vice President	Pfizer International, Inc.
Hugh F. MacMillan	Senior Vice President	The Coca Cola Export Corporation
E. J. McCabe, Jr.	Chairman of the Board	Grolier Incorporated
John R. Meekin	Second Vice President	Chase Manhattan Bank
E. D. O'Leary	Vice President	Ford Motor Company
William Ruder	President	Chase Manhattan Bank
Hoyt P. Steele	Vice President	General Electric Company
Arthur D. Trottenberg	Vice President	The Ford Foundation
E. L. Waggoner	Relations Manager International Division	Mobil Oil Corporation
George C. Wells	Vice President	Union Carbide Corporation

The Council has been communicating with approximately 550 private United States business and corporate enterprises, a list of which is available from the Office of Overseas Schools.

#### Additional Financial Assistance

From time to time, American-sponsored schools have received financial assistance from the national government of the host country in which they operate. No school is known to have received funds to support current operations; however, several have received gifts of land or received very favorable long lease conditions for land upon which they have been able to build new facilities or to expand

older facilities.<sup>14</sup> The American School of Guatemala in Guatemala City is another case in point. Officially designated an "experimental school" for the Ministry of Education in that country, the national government deeded land to the school with the stipulation that it in turn would conduct appropriate educational research and train certain Guatemalan educators.

Private foundations in the United States on the whole have not evidenced much interest in the American-sponsored schools. The larger foundations--as a matter of policy--typically bypass overseas programs and institutions that receive support from the United States Government. Nonetheless, one or more foundations has provided limited support for special project development in select instances. The Jenkins Foundation has underwritten the full program of the American School of Puebla, Mexico, in league with its support of the University of the Americas. The C. F. Kettering Foundation's IDEA program has provided grants to the American School in Mexico and the American School in Guatemala for certain instructional innovations. The extent to which foundations have contributed world-wide is not known. An extensive survey may be warranted in this regard.

#### Technical Assistance and Personnel Development Programs

Since 1957, a number of technical assistance and personnel development programs have come into being in the



United States to help the American-sponsored schools. In that year, Michigan State University<sup>15</sup> pioneered an in-service training program for teachers in the American School Foundation in Mexico. As later described, this was the forerunner of a more extensive program that has come to involve fourteen United States universities and fifty of the American-sponsored schools overseas.

Several major programs now exist for the schools. These include: (1) programs by regional accrediting associations in the United States, (2) technical assistance programs of the Office of Overseas Schools, (3) university-to-school programs, (4) school-to-school programs, and (5) service programs of United States professional associations and governmental agencies. These are discussed in turn.

#### Regional Accrediting Program

For a number of years, the Southern Association of Colleges and Schools has been involved in assisting American-sponsored schools in the American Republics to meet nominal accrediting standards for elementary and secondary school programs. Through this Association, twenty-four elementary and/or secondary schools have been accredited in Latin America in accordance with that association's "Evaluative Criteria."

Other regional accrediting associations have not been as strongly identified in the past with American-sponsored schools overseas. In 1961, the several United

States accrediting associations met to assign themselves responsibility for assisting the schools in the several major geographic areas of the world. Subsequently, these assignments were accepted:<sup>16</sup> (1) the American Republics (Southern Association of Colleges and Schools), and (2) rest of the world (Middle States Association of Colleges and Secondary Schools).

Only eight schools outside the American Republics have been accredited since 1961. Four are located in Near East South Asia, three in East Asia, and one in Europe (see Table 25). To date, associations outside the southern region have not been willing to adapt their standards and accrediting procedures to meet the special requirements of the overseas schools. Mid-Atlantic region accrediting standards for physical facilities, for example, are not relevant to school construction in the Near East South Asia region. Yet, that Association until now has applied its measures to such schools without regard to their irrelevance. Accordingly, many schools in Europe have not sought to be accredited, sometimes to their own disadvantage.

In 1969, however, the several associations agreed to undertake to develop some common standards that might lend themselves to worldwide accrediting of American-sponsored schools, and concomitantly to the development of technical assistance programs that would enable those schools to attain such minimum standards. The initial

report from this effort is due in 1971. Given an acceptable product from this effort, it then should be possible for funding agencies to have certain minimum standards against which to measure the effectiveness of their assistance programs, and for the schools themselves to have certain minimum standards toward which they can strive.

Office of Overseas Schools Assistance  
Programs

The United States Department of State's Office of Overseas Schools has not limited its role to grants making. In addition, it has developed and provided a fairly systematic, albeit limited, program of technical assistance to the overseas schools. The principal participants in this program are the Office's own full time professional education officers who consult regularly with representative schools, assist them in developing appropriate grant requests, and advise them from time to time on school development problems. Such technical assistance evidently is limited by reason of the fact that the Office can support only three full time education officers whose responsibilities for grants-making covers 128 schools in seventy-four countries.

The Office also has developed a cadre of United States consultants who are frequently involved in advising the Office with respect to its policies, procedures, and programs, and in assisting the American-sponsored schools

through long term as well as short term assignments. Certain professionals have been retained on a continuing basis; these include: Finis Engleman, Karl T. Hereford, Frank Hamblin, John Oates and Leonard Saviagano. To mention a few, long term consulting assignments have been made in Europe and Africa for library programs. Reading consultation has been provided in Near East South Asia. Short term consultants were provided in Africa on school board policies and in the American Republics and East Asia on fund-raising techniques.

#### "University-to-School" Programs

The Michigan State University program in Mexico was the forerunner to what now has become known as the "University-to-School Program," sponsored by the Office of Overseas Schools. This program allies university education and liberal art professors with overseas school teachers in planned programs of inservice training on-site, and advanced teacher and administrator training on the United States university campus. Twelve such programs now have been initiated.

The largest program continues at Michigan State University. It has involved an estimated seventy-three different university faculty members since its inception in February, 1957. "The duration of the faculty overseas assignments varied from one week to twelve weeks; collectively, the faculty rendered the equivalent of six man years

of professional service."<sup>17</sup> The inservice program has been extended to an estimated 300 teachers in Mexico, Guatemala, Honduras, San Salvador, and Nicaragua. Approximately forty-five credit courses were offered, each carrying three quarter hours credit. Sample courses included, "Social Problems, Philosophic Foundations, Tests and Measurement, Curriculum Development, and Child Growth and Development."<sup>18</sup> The program also provided numerous workshops, and opportunities for professors to offer technical assistance to individual schools. "To date approximately thirty-eight such workshops and consultations have been conducted in these schools, and approximately 1,140 instructional and non-professional personnel have participated in the specialized, problem-oriented studies."<sup>19</sup> The Michigan State University program currently has fifteen American-sponsored school teachers enrolled for Advanced Study Certificates,<sup>20</sup> twenty candidates for the Master of Arts, and four candidates for the doctorate.<sup>21</sup> Since its inception, four Advanced Study Certificates have been earned by overseas school personnel, fourteen Master of Arts degrees, three doctor of philosophy degrees, and one doctor of education.

The second major University-to-school project was developed by the University of Alabama in Colombia and Ecuador.<sup>22</sup> Under Dr. Paul G. Orr's general direction, the University began a broad spectrum program in Colombia in 1966. The program included credit courses, workshops, and

consultative services. Since its inception, the University has conducted nineteen courses and provided an aggregate of 328 days of consultation involving thirty different individuals from the United States and 112 overseas faculty. The program in Colombia has produced nine Master of Arts degree recipients and one doctorate.<sup>23</sup>

The procedures used to develop the Alabama project in Colombia are described by Orr in "The Colombian Project: A Report of Progress of a Program of In-Service Education in Binational Schools in Latin America," University of Alabama Bulletin, VXII, No. 10 (1968).

Other projects that have been developed since 1964 include the following:

1. Miami University of Ohio with the Eastern European Schools.
2. University of Colorado with the JFK School, Berlin, Germany.
3. University of Florida with the American School of Asuncion, Asuncion, Paraguay.
4. George Peabody College with the American Community Schools, Athens, Greece, and a few schools in the Near East and South Asia.
5. Ball State University with the American Cooperative School, La Paz, Bolivia.
6. Westfield State College with the American School of Puebla, Puebla, Mexico.

The American Association of Colleges of Teacher Education, under contract with the Office of Overseas Schools, coordinated the development of some of these university projects.

"School-to-School" Program

Under the leadership of the Office of Overseas Schools, several school-to-school programs have been initiated by public school districts in the United States with individual American-sponsored schools overseas. These projects provide for a variety of teacher and student exchange. Some of the projects also involve cooperative work in the development of instructional materials, and in the adaptation of United States materials for use in bi-national schools. In 1968, King reported<sup>24</sup> that 20 per cent of the American-sponsored schools were receiving assistance from experienced United States teachers through the "school-to-school" program.

In February of 1970, fifty-seven United States public school districts were formally allied with sixty-one American-sponsored schools overseas. A list of the several "school-to-school" pairings is included in Appendix I. The dynamic for sustaining the program now has been generated by the "school-to-school" participants themselves. In 1966, Administrators in the United States school districts and in the American-sponsored schools then involved in joint projects formed a new association entitled, "Association for

the Advancement of International Education" (AAIE). The Association has established officers and an executive committee. In 1968, it became affiliated with the American Association of School Administrators (AASA) as an advisory body to that group on its international education commitments. Since its inception, the AAIE has held four annual conferences and published proceedings.<sup>25</sup>

"School-to-school" projects have been officially endorsed now by the AASA. Under contract to the Office of Overseas Schools, that Association is expanding the program and has published a detailed handbook for school districts to use in developing "school-to-school" projects.<sup>26</sup> The handbook provides both a model and detailed examples and suggestions for the guidance of those districts seriously interested in international activities.

#### Self-Help Projects

Several indigenous programs have been developed in and by the overseas schools themselves. These include: (1) the formation of regional associations of overseas schools, (2) comprehensive institutional self-studies, and (3) fund raising programs. Some of these involved participation by United States domestic institutions; others are totally indigenous to the overseas school setting.

#### Regional Associations

Regional associations of overseas schools have been formed in nine geographic areas of the world. These are:



1. European Council of International Schools (ECIS).
2. The Eastern European Association of American Schools.
3. Near East South Asia Council of International Schools.
4. Maghreb Association of International Schools-- (North Africa).
5. East Asia Regional Council of Overseas Schools.
6. The Association of American Schools in the Republic of Mexico.
7. The Association of American Schools of Central America.
8. The Association of Colombian-American Bi-National Schools.
9. Association of American Schools of South America.

The first such association grew out of the initial 1957 work between Michigan State University and the American School Foundation of Mexico, D. F. The Association of American-Sponsored Schools in the Republic of Mexico was formed in 1959 in Mexico City. It included: the American schools of Mexico, D. F., Monterrey, Puebla, Pachuca, Durango, and Guadalajara. A year later, a similar association was formed in Central America by the American schools of Guatemala, El Salvador, Honduras, and Nicaragua. The American school in Costa Rica was a sometime member.

These associations have not been uniformly active or successful. The associations in Mexico and Central America--largely due to their close physical proximity and the strength and longevity of local leadership--probably have been the most successful as associations. They meet regularly with formally organized programs. They have involved their board members with some success. They sponsored major surveys of need,<sup>27</sup> and they pioneered certain fund-raising activities.

#### Self-Studies

Two agencies have taken the lead in assisting the schools in conducting intensive institutional self-studies, usually in preparation for an accrediting examination. The Southern Association of Colleges and Schools provided teams for self-studies in Monterrey (Mexico), Guatemala, Rio de Janeiro, Sao Paulo, and San Pedro Sula (Honduras).

Michigan State University provided assistance in the self-study performed by the American School of Mexico in 1960.<sup>28</sup> That school up-dated its studies in 1965 and again in 1970.<sup>29</sup>

#### Fund-Raising Programs

Fund-raising locally has been a necessary and usual practice among many of the American-sponsored schools. Formal, systematic fund-raising programs are known to occur annually in the schools of Tokyo, Sao Paulo, London, Mexico

City, and the Hague. In these programs, special foundations have been established by the schools with appropriate tax exemptions to enable them to attract and receive financial contributions. Many less formal programs have been developed in schools such as Guatemala, Cuayaquil, Djakarta, Singapore, and elsewhere.

Research is needed to determine the effectiveness of these programs. The education officers of the Office of Overseas Schools report mixed findings. It is not clear that the effort expended overall by the several schools in fund-raising is warranted in terms of the marginal benefits many derive therefrom.

#### Related Service Programs

In addition to the programs described above, there are a number of related programs in the United States that purport to assist the American-sponsored schools overseas. Some of these are ad hoc activities. Others appear to be seriously and systematically undertaken. There seems to be no special pattern to these activities. Three principal programs are cited.

#### Recruiting Staff for Overseas Schools

The International Schools Services, with offices in New York City and Washington, D.C., provides certain recruitment services to the overseas schools as part of a contract obligation to the Office of Overseas Schools. The

ISS is a remnant of the older, now defunct Inter-American Schools Service of the American Council on Education, the organization that administered the original United States Government grant program to American-sponsored schools in Latin America.<sup>30</sup>

### Regional Centers

Since 1966, certain of the overseas schools have undertaken to serve a number of other American-sponsored schools in their general geographic region. These service arrangements take on the characteristics, in some instances, of a regional network of schools, each independent but each cooperating in some common service activity or program. None of these regional center/satellite school networks has developed into a comprehensive program similar to those involving "intermediate" school districts in the United States. However, the elements for such programs seem to exist in embryonic form. Centers have been established in the following locations:

1. Barranquilla, Colombia serves fourteen schools in Colombia, Central America, and the Caribbean. Provides technical assistance on curriculum and personnel development.<sup>31</sup>
2. Vienna, Austria. Services six schools behind the "Iron Curtain." Provides general professional consultation and shares educational materials and program information.<sup>32</sup>

3. Mexico City, Mexico. Develops and regularly distributes education materials and audio-visual materials to sister schools in Latin America. Provides consultants from senior staff on a continuing basis. Serves five other schools in Mexico.<sup>33</sup>
4. Sao Paulo, Brazil. Shares instructional materials and provides limited consulting services to several other Brazilian schools.
5. Tokyo, Japan. Shares materials and provides occasional consultants to other Far Eastern schools.<sup>34</sup>

#### Other Assistance Activities

The United States Department of State's Foreign Building Office Staff frequently is consulted on problems of school construction by American-sponsored schools in large population centers overseas. The Office of Overseas Schools also offers an "Assistance in Kind" program in which needed educational materials are purchased in quantity in the United States and shipped to overseas schools in lieu of grants. These include: library holdings, educational kits, professional staff books, and film strip sets. About \$100,000 is expended annually for this purpose by A/OS. The Office of Overseas Schools staff also assists in planning and funding those workshops overseas for school

administrators that annually are sponsored by the several overseas school associations.

### Summary and Conclusions

The American-sponsored schools overseas have received a variety of assistance from governmental, educational, and business agencies and institutions. They receive grants in the amount of about \$4.5 million annually from the United States Department of State's Office of Overseas Schools. Smaller amounts accrue to the schools from contributions by United States business and industrial corporations. These financial assistance programs merely supplement the schools' basic program which is based on tuition for support.

United States school systems and universities have contributed to the schools, principally through the auspices of grants from the Office of Overseas schools. Major educational associations now have embraced the overseas schools, and provide moral support for those United States school districts that have allied themselves with one or more sister schools overseas. The associations also have contributed through recruiting and placement services both for those personnel who seek employment overseas and those seeking domestic employment upon completion of an overseas assignment.

The most substantial contribution of course has been that of several key individuals, who--because of their

professional interest in the schools or their positions with respect to financing the schools--have provided leadership for school improvement through the years. These include certain school directors, government executives, United States school superintendents, and university professors.

Despite these commendable efforts, the several and diverse services to the American-sponsored schools have been frustrated largely from a lack of focus, coordination, and assimilation. Oftimes they have been competitive rather than mutually reinforcing. They have not always built upon the successful experience of predecessors, but in many instances have tended to "rediscover America."

Two primary reasons account for this condition. Each not only is correctable, but should be corrected by a new kind of management strategy for the assistance agencies. First, there does not seem to be any common and compelling objectives that the American-sponsored schools overseas can accept as a basis for equalizing educational opportunities for American elementary and secondary pupils overseas. Concomitantly, there are no common and compelling objectives around which the diverse financial and technical assistance programs for the schools can be organized, focused, and coordinated for optimum effect. Second, there seem to be no common and world-wide standards toward which the schools can strive to attain, and against which school performance and the results of school assistance programs can be evaluated.

Lacking objectives and standards upon which to plan their assistance programs, the several United States agencies involved have tended to go their separate, individualistic ways. On balance, however, the evidence suggests that the several major assistance programs have been helpful. If brought together in support of common school objectives and educational performance standards, they might realize an even greater potential.

For example: The "school-to-school" program clearly can be employed to assist the American-sponsored schools overcome their incipient isolation, and to stimulate them to develop and sustain state-of-the-art programs.

For example: The "university-to-school" program has had a qualified success in personnel development, but has made no significant contribution through research. Nonetheless, it has the potential to be a key program in qualifying overseas teachers for meeting minimum performance standards, and for engaging overseas school leaders in the kinds of research and development activities needed for program innovation.

For example: The professional associations in the United States also are pivotal in that they can provide administrative services to supply personnel for the overseas schools, can participate significantly in personnel development, and can serve as major consumers and disseminators of new products and methods developed in and by the American-sponsored schools overseas.



For example: The overseas regional centers already extant have the potential to become multi-purpose "resource building" centers for shared service programs with "satellite" schools; as centers for instructional materials development and dissemination; and for on-the-job training of teachers and administrators.

Most program assistance to the American-sponsored schools has been directed toward individual institutions, as for example: the O/OS grant program, the "school-to-school," and "university-to-school" programs. Self-help programs also have been institutionally oriented, with notable exceptions. Yet the schools have undertaken--through their regional associations and regional center programs--to establish some sense of systemic linkage among themselves as well as with counterpart institutions in the United States. The evidence suggests that the institutional improvement programs to date may have been more effective than the systems building projects overall. According to experts in regional systems design and development, this would not be unusual.<sup>35</sup> John E. Ivey, former executive director of the Southern Regional Board, one of the pioneer regional cooperative systems in the United States, commented in this regard:

Autonomous institutions tend to cooperate most, and most effectively on peripheral matters. To be effective, regional programs must have funds not otherwise available to member institutions and those funds must be directed toward supporting the regional cooperative programs rather than individual institutional endeavors.<sup>36</sup>

If Ivey is correct in his assessment, major changes in outside funding patterns would be indicated for the American-sponsored schools overseas if they are to be built into a viable and functional system of schools responsive in fact to the imperative educational needs and requirements of American elementary and secondary pupils overseas.

The Office of Overseas Schools would seem to have the greatest potential to pull these diverse efforts together and focus them on appropriate objectives for and subscribed to by the schools overseas. This is occasioned by the fact that the Office is the one agency that has the in-house overseas experience and funds both to assist the schools and the school assistance agencies. By its pattern of grants-making to school assistance agencies it can cause these programs to be focused and coordinated on common targets and objectives. By its grants and conditions for granting to the several overseas schools, it can provide leadership to bring the soundest of the overseas schools together on common objectives and standards. Allied to the Office of Overseas Schools in this regard are the regional accrediting associations in the United States. Their leadership in setting performance standards with and for the overseas schools is a substantive key in any strategy for school improvement.

In conclusion, it would appear that the several school assistance programs have emphasized certain aspects

of institution building (i.e., individual school improvements) at a time when a new viable system of schools is required. Yet, it also would appear that four or five of these programs have the potential for building a system of effective American-sponsored schools overseas, if an appropriate management strategy could be devised and implemented for doing so. Elements of such a strategy are identified in Chapter IV.

## FOOTNOTES

<sup>1</sup>The author qualifies as an expert on legislation affecting overseas schools, in that he administers the several Federal funding programs for those schools and has done so since 1964. Moreover, he regularly develops and presents testimony to the several committees of the Federal Congress that review the substance of the programs and recommend funds to support them. In organizing materials for this section, however, the earlier presentation by Luebke is followed: i.e., Luebke, Community, pp. 14-20.

<sup>2</sup>FAMC, "Overseas Schools Policy Committee for Elementary and Secondary School Activities and Establishment of the Overseas Schools Staff (A/OS)," Joint State/AID Circular No. 237 (September 24, 1964). See Appendix G.

<sup>3</sup>Foreign Affairs Manual, II (2 FAM 600).

<sup>4</sup>Ibid.

<sup>5</sup>Fifteen years later, Rockefeller surveyed American schools in the other major cultural areas of the world. His 1959 report anticipated the kinds of services and support now provided by the Office of Overseas Schools.

<sup>6</sup>Paul T. Luebke, American Elementary and Secondary Community Schools Abroad (Washington, D.C.: AASA, 1969), p. 18.

<sup>7</sup>Ibid., p. 20.

<sup>8</sup>That is the amount that represents the mid-point of the 130 grants made in 1969. Half of the schools received more than the median amount; half received less.

<sup>9</sup>Indeed, company schools (as well as mission schools) pioneered American type educational programs overseas, in the oil fields, on the banana plantations, and in the major population centers of the globe.

<sup>10</sup>A notable example is the American School of Sao Paulo, Brazil. The school was started by the United States Chamber of Commerce in that city. That business group still largely operates and supports the school.

<sup>11</sup>Annual Report of Board of Trustees (Mexico, D.F.: American School Foundation, 1966). (mimeographed)

<sup>12</sup>American School Foundation, Mexico, pp. 5-6.

<sup>13</sup>See Appendix H, FAMC No. 476, Overseas Schools Advisory Council Statement of Objectives (Washington, D.C.: 1967).

<sup>14</sup>Among these are:

- a. American School of Brasilia, Brasilia, Brazil.
- b. Carol Morgan School, Santo Domingo, Dominican Republic.
- c. American Community School, Addis Ababa, Ethiopia.
- d. Joint Embassy School Djakarta, Indonesia.
- e. International School of Islamabad, Rawalpindi, West Pakistan.
- f. American International School, New Delhi, India.
- g. American International School, Kabul, Afghanistan.

<sup>15</sup>That original effort was initiated by Dr. Charles J. Paterson, then the freshman superintendent of the American School Foundation in Mexico and his former graduate school mentor, Dr. Robert L. Hopper, then Head of the Department of Administrative and Educational Services, College of Education, Michigan State University. Dr. Carl Horn, professor of education in Dr. Hopper's department, was the first professor formally to offer credit work in the American-sponsored schools on behalf of a major United States university.

<sup>16</sup>In August of 1969, the Western Association of Schools and Colleges was given responsibility for the Pacific Region. It should be noted that the North Central Association of Colleges and Secondary Schools was assigned the Department of Defense Schools worldwide.

<sup>17</sup>"A Summary of Activities from 1957 to 1969" (unpublished report of programs of Michigan State University and the Association of American-Sponsored Schools in Mexico and Central America, East Lansing, Michigan, 1969), p. 1.

<sup>18</sup>Ibid., p. 2.

<sup>19</sup>Ibid.

<sup>20</sup>A forty-five credit hour program for normalista teachers who have not completed the equivalent of a bachelors degree.

<sup>21</sup>"A Summary of Activities from 1957 to 1969," p. 3.

<sup>22</sup>Dr. Paul G. Orr was the initiator of this program. A graduate of Michigan State University and closely associated with their overseas programs, Dr. Orr formerly was superintendent of the American School of Monterrey, N. L., Mexico.

<sup>23</sup>"Summary Report: The Colombia Project: 1966-69; The Ecuadorian Project, 1968-69: (unpublished manuscript, University of Alabama, 1969).

<sup>24</sup>King, "Recruitment," p. 89.

<sup>25</sup>"A Look to the Future," Conference Proceedings, Fourth Annual Meeting, Association for the Advancement of International Education (Atlantic City, February 13-14, 1970).

<sup>26</sup>"Developing School-to-School Projects," AASA, under U.S. Department of State Contract Nos. SCC-31758 and SCC-2023-02270-69, Office of Overseas Schools, 1969.

<sup>27</sup>Karl T. Hereford, et al., "American Schools in Mexico, Report of Survey of Need" (East Lansing: Michigan State University, Bureau of Educational Research, 1961).

<sup>28</sup>El Colegio Americano Hacia el Futuro (East Lansing: Michigan State University, 1960). Also published by the American School Foundation of Mexico, D. F.

<sup>29</sup>Informe del Progreso (Mexico, D. F.: American School Foundation, 1970).

<sup>30</sup>Monthly reports made by ISS to the Office of Overseas Schools (Washington, D.C.: U.S. Department of State).

<sup>31</sup>Annual Report submitted to Office of Overseas Schools by Inter-Regional Center, Barranquilla, Colombia, 1970.

<sup>32</sup>Annual Report submitted by the American International School in Vienna to the Office of Overseas Schools, 1970.

<sup>33</sup>Annual Report submitted by the American School Foundation in Mexico City to the Office of Overseas Schools, 1970.

<sup>34</sup>Annual Report submitted by the American School (Japan), Tokyo, Japan to the Office of Overseas Schools, (Washington, D.C.: U.S. Department of State, 1970).

<sup>35</sup>This point is made explicitly with respect to such regional endeavors as the East-West Center in Hawaii and the Instituto de Investigaciones y Mejoramiento Educativo in Central America. Karl T. Hereford and Burton D. Friedman, Administering Interuniversity Enterprises Overseas (Tuscaloosa: University of Alabama Press, 1970).

<sup>36</sup>In private conversation with the author in Washington, D.C., 1966.

## CHAPTER IV

### A DIAGNOSIS AND PLAN FOR ACTION

In Chapter I, four principal objectives were established by which to assess the capability of 128 American-sponsored schools overseas to guarantee an appropriate and equal educational opportunity for United States elementary and secondary pupils overseas. A partial assessment of these schools was accomplished in Chapter II. The objectives also were employed in Chapter III to determine the appropriateness and effectiveness of United States sponsored school assistance programs. In this chapter the same statement of objectives was employed to identify management strategies for improving the capability of the American-sponsored schools and for increasing the effectiveness of school assistance programs.

The four objectives can be restated as follows:

(1) to equalize educational services among 128 American-sponsored schools overseas; (2) to normalize major differences of fiscal capabilities among these schools; (3) to equalize the educational performance of pupils in these schools, and (4) to build the capacity within each school



to renew itself on a timely basis, both as an educational and as a cultural institution.

#### Problem Addressed in the Chapter

To attain the first two objectives requires "systems development" strategies and activities. The last two objectives were seen primarily to require institution building strategies and programs. Each and all objectives, however, were derived from the two philosophic requirements that were established in Chapter I as the essential conditions to be attained for the overseas education of American pupils, namely: (1) the right of parents to choose the kind of education they deem to be appropriate for their children while assigned overseas, and (2) the right of each American pupil to enjoy an opportunity for education overseas that is no less appropriate or effective than that guaranteed to him by government in the United States.

The problem addressed in this chapter, therefore, may be stated as follows, namely: what key management strategies are required to meet the four objectives in a timely manner given (1) the known limitations in capability of the overseas schools, and (2) the observable limitations in effectiveness of school assistance programs?

#### Method Used to Generate Strategies

For each principal objective, one or more management requirements was identified for meeting that objective.

Although these requirements are constructed to apply to the thesis topic, they were generated in many instances from experience gained from analogous situations and from constructs associated with contemporary theories of social systems. For the latter, the author is indebted to the ideas developed in the published works of Charles P. Loomis on elements of social systems.<sup>1</sup>

Against these management requirements the several practical barriers to satisfying these requirements are cited. These follow from the conditions in the American-sponsored schools and from the limitations in the school assistance programs.

A strategy then was devised that relates parsimoniously a limited number of activities, or programs of activities, to meet an optimum of the systems and institutional objectives, both individually, interactively, and in multiples. Consideration is given to a choice among strategies whenever alternatives are evident. In some instances, a strategy--or principal elements of a strategy--may be "borrowed" from situations that appear to be analogous to the problems or conditions addressed in the thesis.

Finally, elements of the major strategies are delineated, wherever feasible, for long term, intermediate term, and short term objectives.

Situation to be Corrected in Summary

In Chapter II it was noted that the American-sponsored schools overseas are deficient in significant ways. Individually, they appear to lack the institutional capability to provide the range and quality of appropriate services for American pupils overseas. Moreover, they seem to lack a systems capability to guarantee the delivery of services that are roughly comparable in quality to those offered in the United States. The key facts as developed in Chapter II are these:

1. The quantity and quality of school services vary widely, from region to region, and among schools in the several regions.
2. Where the United States pupil lives, more than any other single factor, determines the extent and quality of his educational opportunity overseas.
3. Schools also vary in their ability to finance adequate educational services. Many are too small to achieve any economy of scale. Most rely principally, if not exclusively, upon tuition as the basis for covering the costs of educational services.
4. Schools vary markedly in their commitment to certain basic objectives. Some seek to exploit fully the educational opportunities evident in

the cross-cultural setting provided by the host country. Others seek to meet only those minimum legal or political conditions established by the host country for the privilege of operating as private institutions.

5. Schools vary in their performance as compared to minimum standards established for public and private schools in the United States.
  - a. Qualifications of teachers, both nationals and United States citizens, almost uniformly are lower than in United States public and private schools. Isolated schools are worse in this regard than those located in large population centers.
  - b. Diversity of curriculum offerings (particularly at the high school level) compares somewhat favorably with schools of comparable size in the United States. Special provisions for slow-learners or non-college bound pupils are virtually non-existent.
  - c. The quantity and quality of instructional materials is deficient, although significant improvements since 1963 were noted by some researchers. There is no evidence, however, that new instructional systems are systematically introduced into the schools. Hence,

instructional programs that are not now obsolete can obsolesce at a rate faster than can be corrected at current levels of funding or within the capability of present school management.

- d. Turnover<sup>2</sup> among key school personnel, particularly of United States citizens, is often double that found in comparable schools in the United States.
- e. Levels of expenditure by some of the schools may seem consistent with those made by United States public schools, but the comparison is misleading. In fact, the per pupil expenditures overseas for comparable services is less than 50 per cent of that made by comparable private schools in the United States and among suburban public schools that enroll a comparable proportion of college-bound pupils.

#### A Diagnosis

These conditions symptomize a situation that might be generalized in two statements, namely: (1) the 128 American-sponsored schools overseas do not constitute a functional and viable educational system that is responsive to more than the barest educational requirements of United States elementary and secondary school pupils overseas.

(2) Moreover, the individual schools--with notable exceptions--lack the basic capability to render appropriate and quality services, both as educational and as multi-cultural institutions.

If these general statements can be accepted, then it follows that programs for corrective action (i.e., United States sponsored financial and related assistance programs) necessarily must come to grips both with "systems development" and "institutional development" problems. Fortunately, elements both of systems and institutional development strategies already have been devised to treat conditions such as these. For example:

1. By intensifying in-service development of national personnel in key leadership positions, the overseas schools can acquire and maintain United States trained teachers, and reduce thereby their unwarranted reliance upon the recruitment of United States citizen teachers.

2. By introducing a new kind of management and technical assistance in the schools, it should be possible for the schools to design, develop, install, evaluate, and replicate needed new instructional products and systems.

3. By forming appropriate coalitions of local community groups, the schools should be better able to meet their persistent and compelling problems of local community support while addressing themselves more realistically to meeting the divergent needs both of national and United States citizens for a participatory education.

4. By defining a "minimum foundation program" of services, for which each school might be supported from non-local funds, it should be possible to equalize services among the schools and ultimately to equalize educational opportunities for the United States pupils who attend these schools.

Current Assistance Programs  
Are Inadequate

In Chapter III, evidence was presented that the several United States sponsored financial and related service programs to assist the American-sponsored schools overseas are deficient in significant ways. Real progress, however, has been made since the introduction of these programs, particularly in establishing cooperative systematic linkages with United States schools and universities to help overcome the isolation of the overseas schools. Individual teacher and school administrator competence has been markedly improved in many schools. Most noteworthy in this regard have been the University of Alabama and Michigan State University in-service education programs in Mexico and Central America.

Real progress also has been made in supplementary funding for certain of the overseas schools' areas of greatest need. Most dependable of these funding sources has been that available through the Office of Overseas Schools of the United States Department of State. Moreover,

a joint business-government Council has been established to lend its expertise in organizing and regularizing support from those United States business and industrial corporations which maintain branches or dependent enterprises overseas.

Despite these encouraging developments in programs to assist the American-sponsored schools overseas, certain basic deficiencies in the programs persist. The several programs lack real and common objectives that address in any coordinated way either the systems or institutional development problems that characterize the overseas situation. Moreover, the several programs lack thrust and continuity of effort. There remains also, particularly among the programs involving United States schools and colleges and universities, a regrettable lack of institutional commitment to the effort to improve the overseas education of American children.

Characteristically, the United States university programs lack a research basis. Both consultation and training programs have failed to address adequately the cross-cultural challenges of the overseas schools. Successful progress to date typically has resulted from the commitment of a few individuals rather than from a persistent and continuing commitment of the institutions they represent. Accordingly, in 1970, assistance to the overseas schools remains fragmentary, underdeveloped, and largely



peripheral to the development programs that confront the schools.

These conditions, however, would seem to be correctable, if not self-correcting. For example:

1. A coalition of United States government and business enterprises could underwrite the cost to support at least minimally acceptable educational programs in the American-sponsored schools overseas.
2. Cooperative programs of mutual assistance between United States educational institutions and overseas schools could be designed so that the partners in the program, each acting in his own institution's main interests, can produce mutual benefits.

Examples of mutually rewarding programs might include:

- a. Joint development of cross-cultural instructional materials and experiences, and
- b. Joint programs in the cross-cultural preparation of educational personnel.

The opportunity to pursue such joint endeavors could be crucial to the favorable decision of United States schools and colleges to be involved seriously in the development of American-sponsored schools overseas.

3. The management of United States financial assistance programs to the overseas schools could be improved, specifically to involve United States business and industrial management techniques and procedures in the definition and delivery of services, funds, and technical assistance to the overseas schools. These might include:
  - a. Methods of systems analysis.
  - b. Planning of objectives.
  - c. Allocation of resources to management objectives.
  - d. Development of logistical support systems in both host countries and the United States.
  - e. Objective evaluation of educational performance.

#### Theory of Approach to Problem

It has been observed that the 128 American-sponsored schools overseas have certain basic deficiencies, namely: the individual schools uniformly do not have the personnel and related resources necessary to adapt and sustain modern educational programs, and in the aggregate they do not constitute a viable educational system that is responsive to the peculiar requirements of United States pupils overseas. The situation thus summarized was deemed to be correctable,

principally because systems and institution building strategies and methodologies appropriate to this situation have been identified elsewhere and found to be workable. The specific elements of an approach follow almost directly from the characteristics of the schools themselves.

By way of explanation, the American-sponsored schools overseas are private. Moreover, they are legally incorporated independently one of the other. There is no legal structure upon which to establish a systems development strategy, as there would be in a State system of relatively autonomous local schools in the United States. Moreover, the 128 overseas schools are not uniformly associated in cooperative structures that would make it possible for them to engage in joint or cooperative activities directed toward the achievement of the aims and objectives cited earlier in this thesis. The 128 schools are widely dispersed in seventy-four countries and five continents; they vary widely with respect to school organization and with respect to size and composition of enrollment. They lack any immediately identifiable systems structure. They share no common value base, except for their reputed commitment to providing overseas a "United States type school program." They accept no uniform standards of institutional behavior, although some subscribe to one or another accreditation program in the United States. The rewards for good school performance are essentially local, that is: each

school looks to its own board and parent constituency for its rewards, and not externally as a school that constituted a viable part of a larger educational system might. Accordingly, the schools evidence little propensity for change. They have established limited systemic linkages with other schools and organizations, either overseas or with sister institutions in the United States. In short, the schools evidence most of the characteristics associated with institutions that are isolated, both physically, geographically, and sociologically. Nonetheless, it is from these schools that a system of viable institutions must be constructed, and through that system basic guarantees established for United States parents and pupils overseas.

In order to change this situation, a theory of approach must be identified that addresses the essential isolation of these schools. Such theory is evident in the master processes of social systems development, as developed by Loomis.<sup>3</sup> To overcome isolation and to effect change in the schools, Loomis' theory of social systems suggests several basic approaches, namely: (1) establishing a viable structure of relationships among the schools through an existing or invented common element that has high value potential for the schools, (2) elaborating a series of systematic linkages with the kinds of institutions and practices that one wishes to introduce into the new structure, (3) providing material incentives for introducing the

desired new practices, (4) flooding the new system with sentiment in order to reinforce and sustain newly established practice, and (5) segregating out potential school leaders and change agents for special training and indoctrination.

When applied to the overseas situation, these theoretical constructs can be translated into elements of a strategy to improve the overseas situation. These are: (1) establish viable linkages with each individual school through a common funding agency, (2) build consensus among the 128 schools through that agency for a common program of services to be provided by each school, (3) provide sufficient funds to the schools to enable them in turn, to provide the desired services; pay in proportion to results produced and award incentives for successful performance, (4) engage the schools in regional cooperatives based upon common needs for qualified personnel, instructional materials, and technical assistance, and (5) engage United States schools, colleges, accrediting associations, and consulting firms systematically in work with the overseas regional cooperatives and associated schools.

These elements of strategy are now applied to the objectives that were identified earlier both for systems and institution development among the 128 American-sponsored schools overseas.

A Management Strategy for Systems Development

Six specific steps might be taken to meet the systems development requirements established for the overseas schools. These follow from the theoretical conjecture established earlier. They seem also to be consistent with reported conditions (1) among the schools themselves, and (2) among the measures available for corrective action.

The six steps are:

1. Establish a common program of services to be provided at an acceptable level of quality by each participating school. This might most readily be accomplished through a program of world-wide accreditation of American-sponsored schools overseas.
2. Establish a common financial fund with sufficient resources to attract the schools' participation in the guaranteed service program.
3. Establish a common funding source, with characteristics acceptable to the schools. This might best be a non-government institution that, nonetheless, is responsive to public policy.
4. Establish a formula for distributing funds to the participating schools that will equalize disparities among the schools due (a) to geographic isolation and/or size of enrollment, or (b) to tuition raising capability.

5. Establish technical and management assistance services to help the schools develop reasonable program-financial plans as a basis for support from the common funding source.
6. Establish provisions for awarding funds on the basis of performance contracts that are responsive to the schools' program-financial plans, the validation of the schools' performance to be subject to an independent accomplishment audit.

These elements of strategy are not new, nor are they unique to the overseas schools. Indeed, historically they have been employed by relatively weak central governmental bodies that wish to induce certain conformity or change in behavior among their relatively autonomous constituency.<sup>4</sup> In this respect, the situation among the overseas schools is not unlike that which confronts state education agencies in their relationships with autonomous local school districts. Indeed, the analogy is instructive. Many states have sought to achieve precisely the two systems development objectives cited above among their local districts, namely: equalizing services among districts that vary widely in quality of services while normalizing differences among those districts' fiscal capacities to support education.

In thirty or more states, the principal strategy for achieving these objectives has been one or another variation of a minimum foundation program,<sup>5</sup> that is: state financial subsidies to local districts that enable them to achieve and/or maintain a certain minimum quality of educational services that the state desires but cannot "order" locals to establish. Most foundation programs also provide for an equalization of local school district tax ability so that the tax payer in one district need not make a disproportionately greater or smaller effort than in another district in order to support the district's share in the minimum foundation program.<sup>6</sup>

These techniques and strategies seem applicable to the situation with respect to the American-sponsored schools overseas. Certain exceptions to the analogy obviously must be accepted, however. These are: (1) the new systems structure to be established with the overseas schools, although formal, is not a legal entity; rather it is comprised of a set of voluntary contracts between individual schools and a common funding agency; (2) programs and services to be provided through the new structure are voluntary; (3) no legal sanctions can be brought to bear on non-cooperating or non-participating schools; rewards can be withheld, however.

The key management strategy suggested here follows from the one unity known to exist among the schools, that



is: a need by each school for considerable financial support from outside sources. It should be feasible, therefore, for an outside funding source to induce both the structure and substance of a new educational system by providing funds to the American-sponsored schools overseas under certain specified conditions. The mechanisms for doing so are known and time-tested in one form or another.<sup>7</sup>

That potentially unifying role is played now in part by the Office of Overseas Schools of the United States Department of State through its program of grants-in-aid to the 128 American-sponsored schools. However, neither the level of individual school grants nor the objectives for grantsmaking by the A/OS are appropriate to the task of systems building among the 128 overseas schools. Nonetheless, the A/OS financial assistance programs constitute in fact the one potentially unifying force for systems development among the overseas schools.

Many of the overseas schools prefer to keep themselves divorced from United States government foreign policy, however. They would not necessarily welcome an enlarged role for the Department of State in financing basic services provided by the schools. Were the A/OS to take the lead, however, in bringing the programs of other agencies and institutions to bear on the development problems of the overseas schools, and to seek to establish an "independent" source of new outside funding for the schools, the schools' objection to government's participation should be alleviated.

Key Programs for Implementing Systems  
Development Strategy

The key programs that would seem most appropriate for implementing the systems development strategy are as follows: (1) a Guaranteed Services Program, based upon acceptable world wide accreditation standards, (2) a Minimum Financial Assistance Program, with sufficient funds to secure the Guaranteed Services Program, and (3) a Congressionally established government/business foundation to administer the financial assistance program.

These programs may be described as follows.

Guaranteed Services Program

The principal objective to be achieved through this management devise is the equalization of services among the diverse American-sponsored schools overseas. As defined in Chapter I, to equalize services means to introduce an acceptable albeit minimum quality of services into each of the overseas schools. This would have the effect of guaranteeing each United States pupil an acceptable level of educational services whatever his place of residence overseas, an obvious first step toward equalizing his educational opportunities.

The guaranteed services program is not a standard curriculum. Rather it is a set of standards for personnel and services that the overseas school agrees to provide in exchange for adequate outside financial support. As yet,

no such standards have been developed. A group of representatives of United States regional accrediting associations and of the overseas schools now is working to identify common world-wide program standards that might fairly be applied to the overseas schools. That work should be completed in 1971. However, the general standard of services to be attained through any guaranteed minimum program would have to meet certain evident criteria. Among these might be the following: (1) a qualified teacher in every classroom, (2) a reasonable teacher/pupil ratio, (c) appropriate supporting service personnel, (d) adequate instructional materials, (e) a safe and sanitary facility, and (f) a capability for management planning and evaluation.

Similar criteria have been employed in numerous State supported minimum foundation programs.<sup>8</sup> Adapting one of these<sup>9</sup> for possible application to the overseas schools situation produces the following general recommendations for minimum services:

Personnel:

One qualified teacher for each twenty pupils. This would enable the overseas school to maintain currently adequate pupil/teacher ratios both at elementary and secondary levels in whatever mixes it deems appropriate for good instruction. For example, a classroom ratio may average 1:25 in the elementary school and 1:17 in upper grades. With this level of personnel service, schools should be enabled

to individualize instruction for most pupils and still maintain an economical institutional cost, all other factors being equal. A "qualified teacher" in an American-sponsored school overseas might meet one of several operational criteria, namely:

1. A graduate of a United States university teacher training program with full credentials for teaching in a public school in the United States.

2. A graduate of a United States university in an area of teaching who has obtained appropriate professional training at the fifth year level and who meets typical certification requirements, although not necessarily certified in any state, and who would typically meet employment requirements of accredited private schools in the United States.

3. A host country (or third country national with host country credentials for teaching in the national schools of that country) who has successfully completed a one-to-three year training program in the United States especially designed to qualify that teacher for a leadership position in the American-sponsored school overseas.

A qualified administrator for each twelve full time equivalent teachers. This level of personnel support would enable all but the very smallest overseas schools to employ and retain an effective management component. At the same time, it would permit larger schools to organize internally

in ways they deem to be most advantageous for program administration. A qualified administrator is defined to be a graduate of a United States graduate training program in school or educational administration at no less than the fifth year of graduate training. A fully qualified administrator would have completed a sixth year or doctoral program in this field of major.

A qualified curriculum or instructional supervisor for each twelve teachers. This would enable all but the smallest schools to provide an acceptable level of instructional leadership for systematic program development and re-development. Under provisions of the minimum support program, the smallest schools (those with fewer than 100 pupils) could combine the administrative and supervisory units in order to retain the full time services of a director. A qualified supervisor would have completed no less than the master's degree program in an appropriate field from a United States university.

A qualified counselor for each 150-250 pupils enrolled in the upper four grades. This level of service would enable most overseas high schools to provide needed career and personal counseling both for United States and host country pupils. Career counseling qualifications for United States pupils overseas would not differ materially from that for pupils in United States schools, hence a

fifth year level of training in an accredited United States university program should be minimal for this purpose. However, personal counseling requirements in bi-national or multi-national schools have not been clearly identified; hence, qualifications for this needed work cannot be specified at this time.

A school librarian for each 200-250 pupils. This level of support is consistent with recommendations by professional library association.<sup>10</sup> More importantly, it will enable the overseas schools, regardless of size, to undertake to develop and utilize instructional materials of all types, and to build an instructional materials and media center for use by pupils and teachers alike.

A qualified para-professional for each six qualified teachers. This level of service will enable even the smallest school to secure minimal clerical assistance. Larger schools will be enabled to retain services of a limited number of teacher aids as well.

Services:

Instructional materials, library materials, audio-visual materials and professional studies materials in an amount equal approximately to \$50 (USCy) per pupil per year. This level of service should enable each school to replace obsolete library holdings, to develop its holdings of supplementary instructional materials, and to begin to develop

a film, filmstrip, audio tape, and three-dimensional materials library for use by pupils in independent study and by teachers and pupils in curriculum planning.

Community, recreation, and health services in an amount equivalent to approximately \$25 (USCy) per pupil per year. This level of service would enable all but the smallest schools to provide at least the part time services of a qualified nurse or dental attendant; also, it would enable the school to sponsor community resources surveys and other activities that are calculated to strengthen the school's relationship with its surrounding community.

Special education services supported at approximately one-and-one-half the level of support provided non-handicapped pupils. This level of service would enable the largest schools to provide limited special education programs for slow learners or pupils with special learning problems, as for example: remedial reading. It is evidently infeasible for most overseas schools to provide appropriate special programs for severely handicapped pupils, whose special learning problems would require the attention of a group of highly qualified specialists. For these few pupils, provisions should be made to assist their parents in locating the pupil in an already established program appropriate for the pupil's handicap.

Teacher in-service training equivalent to \$10 (USCy) per pupil per year or about \$250 (USCy) per teacher per

year. Heavy emphasis will need to be given this function in order to qualify all teachers by means of special training in multi-cultural instructional programs, as these develop. Specific attention must also be given by most schools to qualifying their host or third country nationals through special United States training programs to be established for this purpose.

Administration and Development:

Program-financial planning and research and evaluation services, equivalent to approximately 5 per cent of operational expenditure each year. These functions are almost totally non-existent in the overseas schools. (They account for less than 1 per cent of expenditure among United States domestic schools.)<sup>11</sup> Yet the American-sponsored school overseas is so isolated, hence so vulnerable to obsolescence, that the proposed level of investment in the design, development, installation, replication, and evaluation of instructional systems appropriate for their multinational student bodies does not seem to be out-of-line. Moreover, program-financial planning should become an integral part of the standard management practice of the school. The use of this technology will be required of those schools that participate in the minimum financial support program, and the allocation of 5 per cent of expenditure to this function can provide needed management consultation and/or technical assistance to the schools.



Plant maintenance and operation services, equivalent to about 10 per cent of operational expenditure each year. This level of service enables the overseas school to meet annual recurring costs involved in the use, care, and minor remodeling of its physical plant. Since the overseas schools are located in seventy-four different countries, it is not feasible to establish a uniform level of support or service in this area. In locations requiring heating of physical facilities, costs necessarily will be greater than in tropical climates, for example. Yet the principle is clear: to equalize instructional services and opportunities for pupils, those schools that must expend heavily for plant maintenance and operation should be supported at a proportionately higher level so that they can maintain an appropriate quality of instructional service as well.

Fixed charges, including teacher retirement benefits, equivalent to 5 per cent of personnel salaries. Retirement benefits, and/or social security are important but not critical elements for a guaranteed services program.<sup>12</sup> United States teachers temporarily accepting employment in the overseas schools might be more easily recruited if they could continue their social security programs while in-service overseas. Those United States teachers and administrators who would seek a career in the overseas schools also would be attracted by a retirement fund. Host country nationals employed as career teachers in the overseas

schools might be supported at a level at or above that established for teachers in the national schools of the host country. But for all schools, minimum provisions should be established to cover costs for group health and hospital insurance (whenever available in the host country) and for group life insurance. These personnel benefits rarely will be equal to those available in United States schools, simply because the insurance services themselves are not as yet fully developed in the seventy-four countries in which the overseas schools are located. Nonetheless, each school should be enabled to provide such services as are available in the host country without reducing commensurately its investment in instruction.

Capital costs for replacement of equipment, minor expansion of plant or land acquisition, exclusive of major expansion or construction equivalent to approximately 4 per cent of current expenditure. This level of service enables the overseas school to handle most of its debt service and minor capital outlay problems without seeking special funding. For plant replacement and/or major expansion incurring extraordinary costs, separate provisions would have to be established in the financial assistance program for funds to underwrite construction loans, or a separate grants-in-aid program for construction.

### The Minimum Financial Assistance Program

The American-sponsored schools overseas are not now uniformly able to finance a guaranteed services program as described above. These schools rely almost exclusively upon tuition to cover their costs of personnel and schools operations. The relatively small grants obtained from the Office of Overseas Schools are helpful, to be sure. However, the purpose of those grants is to supplement a largely local effort, not to provide a significant share of funding for school operations.

It is proposed therefore that a minimum financial assistance plan be established by appropriate governmental and corporate agencies to provide the basic funding required to secure full support of the guaranteed services program. The objectives for the financial program would be two-fold, namely: (1) to provide the additional funds, over and above a fair local contribution from tuition, that would be needed in each of the 128 overseas schools to provide adequate and comparable educational services, and (2) to normalize disparities in the fiscal capabilities among the 128 schools.

### Key Program Provisions

The financial program as proposed would have five major provisions, as follows:

1. A program-financial plan as the basis for outside funding. Each school would be assisted in the

development of a comprehensive program-financial plan as the bases for requesting outside financial assistance. The program-financial plan would indicate the precise means whereby the school would qualify its personnel in accordance with the standards established in the Guaranteed Services Program, upgrade its instructional materials, and in all other ways meet the minimum standards established in the Guaranteed Services Program. Those schools that already meet the minimum standards would also define their program objectives and identify key activities to meet those objectives. Evidence would be required of all applicants that the key elements of their program plans were cost-effective. A budget of all proposed expenditures to implement the program plan also would be required. In the initial stages of development of the minimum financial assistance program, the funding agencies should contract with appropriate management agencies to provide the schools necessary technical assistance in program-financial plans. This service is calculated to assure a certain uniformity in quality of program proposals from the diverse schools.

2. A simple, understandable formula for distributing financial assistance to the schools that agree to participate in the Guaranteed Services Program. Such a formula might be adapted from the procedure employed in any one of the major minimum foundation programs extant in the United States. Reference once again is made to the North

Dakota program, which seems to be adaptable to the overseas situation.<sup>13</sup> That formula provides for a calculation of the total cost to secure the desired instructional and related programs in the applicant schools. This is called a "gross allowance." A fair and proportionate share in funding the gross allowance is determined for applicant schools. This is called the "school share." In each case, the share to be funded by the outside agency is the difference between the gross allowance and the school share. For example, the average cost of the guaranteed program might be calculated to be \$650 per pupil. A fair local school share from tuition then may be negotiated at 80 per cent, hence the share to be secured by the outside funding agency would be 20 per cent of \$650 or \$130 per pupil. The outside funds would be distributed unequally, however, because schools differ both with respect to the cost to provide the basic services and in their ability to raise a fair local share from tuition.

3. Performance contracts would stipulate the requirements to be met by the applicant school. This device is calculated to assume that the schools employ funds received from the outside agency in ways consistent with their approved program-financial plans. A performance contract is the only morally binding agreement between the funding agency and the contracting school.

4. An independent accomplishment audit is included as a standard provision in each performance contract. In

order to obtain full funding under the proposed financial assistance program, the applying school must agree to obtain an independent audit of its program performance against the objectives and requirements established in its approved program-financial plan. These audits are more than fiscal audits. They are program or educational audits, and serve as the basis on which contract continuation or modification is negotiated. Performance auditors must be certified by the financial assistance agency. They might include: accrediting agency teams; qualified teams from cooperating state education agencies; private management firms; or teams of university personnel.

5. Incentive grants may be awarded those schools that meet and/or exceed program performance requirements. Such grants have not been used extensively in educational institutions before, although the basis for doing so was established in the Elementary and Secondary School Act of 1965. Nonetheless, the principle is known and tested in other fields to good effect. Provisions for incentives could be included in the performance contracts of those schools that are seeking to increase their number of fully qualified personnel, or in introducing a new reading or similar instructional technology. The incentive might take the form of additional funds (over and above the minimum financial assistance), leaving entirely to the school the disposition of those funds.

Principles Governing the  
Financial Program

Empirical studies will have to be made in order to establish the concrete procedures for supporting the 128 schools using the key provisions suggested above. However, basic principles for establishing and operating such a program already have been laid down in several minimum foundation programs in the United States. Five of those underlying the North Dakota program appear to be particularly adaptable to the overseas situation.<sup>14</sup> These might be paraphrased as follows:

1. In order to secure the Guaranteed Services Program, the funding agency should establish services below which it will not permit the participating institutions to fall. In the case of the overseas schools, the funding agency would be representative of those government and corporate employers whose employees and their families are being supported in overseas assignments.

2. These levels of services are adjusted periodically on the basis of best available evidence of need, and on the basis of a reasonable consensus among the authorities of the overseas schools as well.

3. Full participation in the financial assistance program should be contingent upon the overseas schools' willingness and ability to enroll an optimum number of pupils in order to achieve a reasonable economy of scale in the cost of basic services. (Initially, it might not be

unreasonable to limit full financial assistance to those schools that enroll at least 200 pupils, or about 60 per cent of the American-sponsored schools. Those among the fifty-one very small schools that can demonstrate that geographic isolation prevents them from building up an economically favorable enrollment might be included as individual and exceptional cases.)

4. The amount of funds to be made available to the schools should be based upon the proportion of qualified personnel employed and retained by the schools. Significantly reduced amounts of funds should be paid for underprepared or otherwise unqualified personnel. (As will be developed later, this policy should be supported by a companion program of advanced training that would qualify all personnel in the overseas schools within a relatively brief period.)

5. In setting the amount of funds to be provided by the participating school in support of the Guaranteed Services Program, sufficient leeway should be established to enable the schools to exceed the minimum requirements of that Program and to introduce new or enriched instructional programs on their own initiative.

#### How the Financial Assistance Program Might Operate

In order to operate the outside funding program suggested above, three steps would have to be taken. First,



it would be necessary for the funding agency and the participating schools to agree upon the elements of the Guaranteed Service Program to be supported. Second, the cost to provide these elements of service would have to be established empirically, taking into account regional economic differences and factors of isolation and school size as well. Third, the financial level at which the funding agency would support the service program would have to be determined, taking into account the objectives of the program (i.e., to effect substantial and real changes in the quality of services in the overseas schools), a contribution of a fair local share through tuition charges, and the availability of external revenues as well. When revenues are not adequate for full support of the program, the funding agency can pro-rate existing revenues to the schools or, more rationally, it can temporarily eliminate one or more elements from the service program on a priority basis.

As a beginning, a short term objective might be to equalize United States trained teacher salaries with the average of that available in the United States. This would represent an increase from about \$5,000 to about \$6,000. Non-qualified teachers would continue to be supported at the present level of approximately \$3,200 without increase until the teacher is fully qualified by United States standards. The long range intent, of course, would be to have a qualified teacher in every classroom, and to make it

possible for the schools to support that teacher at or about the average of United States teacher salaries. The cost of outside financial support during a development period in which the schools are qualifying their personnel would fall substantially short of the ultimate, long term cost. Initially, the Financial Assistance Program might be established at 20 per cent of the calculated aggregate cost to provide the Guaranteed Service Program, or approximately \$130 per pupil at average current per pupil costs overseas. This would increase the average of all teacher salaries to about \$5,400 and that of fully qualified teachers to approximately \$6,500. An additional \$58 to \$59 per pupil also would be available to begin the process of adding other needed personnel, to expand or improve the quality of holdings of instructional materials, and to finance adequate plant maintenance and operation.

#### Administering the Financial Assistance Program

It would well be within the competence of the Office of Overseas Schools to administer a financial assistance program of this character, were its annual Congressional appropriations sufficient to the task. It might be possible also the A/OS to delegate this function to a private corporation. However, the most appropriate mechanism for administering the program would seem to be a new quasi-public (or quasi-private) foundation, established by Congressional

action and including in its governing board representatives of the United States government, major United States corporations with interests overseas, and distinguished United States and overseas educators. Its staff would be drawn from personnel experienced in overseas education especially in the American-sponsored schools overseas.

The advantages of the quasi-public corporation for this purpose are many. First the agency could be responsive to public policy without being an agent of United States foreign policy, as the Office of Overseas Schools necessarily must be. Its Congressional charter would entitle it to be a line item in a Congressional appropriations bill; yet, its quasi-private character would permit it also to subscribe substantial additional funds from the major United States corporations whose employees overseas are to be benefitted. The direct participation of United States corporations in the management of the program doubtlessly would be an attractive feature to business and industry, as would the "pay for performance" principles upon which the financial assistance program is based.

The disadvantages to the independent foundation as the administering agency for this program also are evident. The establishment of such an agency would require special Congressional legislation and an increased appropriation (over and above that now provided to the Office of Overseas Schools). A new and separate staff would need to be

recruited, even though the Office of Overseas Schools' staff already is experienced in these matters.

On balance, the advantages would seem to outweigh the disadvantages, given that the prerequisite Congressional action might be accomplished.

Clearly, the proposed program-financial plans and performance contracts represent a major involvement by the funding agency in certain basic school developments. While a private corporation might administer a financial program satisfactorily, it cannot be relied upon to be responsive to United States policy concerns. Accordingly, it is proposed that a quasi-public corporation be established (1) to administer the financial assistance program in accordance with the principles established above, and (2) to subscribe revenues from United States business and industry over and above those appropriated annually by the United States Congress.

#### A Management Strategy for Institutional Development

It was established in Chapter II that many of the American-sponsored schools overseas lack basic capabilities in staff, organization, curriculum, and instructional practices. They have a propensity to become obsolete due to their isolation from the mainstream of educational developments in the United States. Few have attained any real stature as cultural institutions within their host countries.

Indeed, the situation overseas is not unlike that to be found in some of the marginal state education systems in the United States. For example, in North Dakota over half of the elementary school teaching force is underprepared by current standards.<sup>15</sup> All values resist change. In Virginia, for example, less than 15 per cent of the teaching force holds the masters degree. Standard classroom practice in these school systems generally is reputed to be thirty to fifty years behind that of the best schools in the nation.

The central conditions to be altered in the overseas schools, therefore, are clear, namely:

1. Qualify by United States standards the approximately 40 per cent of the teachers in these schools who are underprepared (see Table 12).
2. Stabilize teacher turnover, or eliminate the negative effects of turnover among United States teachers, or both.
3. Install a new management capability in the schools for program development and, wherever practical, for innovation as well.
4. Overcome isolation and resistance to change, by bringing the schools into a systematic and viable relationship with sister institutions both overseas and in the United States.
5. Cultivate a research and development program in certain of the schools in order to illuminate

appropriate objectives and limitations of cross-cultural learning experiences both for United States and host country pupils as well.

6. Exploit the opportunities and challenges offered by the overseas school staffs to develop unique cross-cultural and multi-cultural instructional materials that might profitably be exchanged with United States schools for modern curriculum materials in the sciences, mathematics, and in the teaching of the English language.

These changes are calculated to achieve two principal objectives among the 128 American-sponsored schools, namely: (1) to equalize the educational performance of pupils enrolled in the schools, and (2) to renew the schools' institutional capabilities, both as educational and as cross-cultural enterprises.

#### Elements of a Management Strategy

The elements of a management strategy appropriate to the task of rebuilding the overseas schools already exist. They have not been assimilated, however, into a potentially effective strategy and program for implementation.

As summarized in Chapter III, elements of a potentially effective system's linkage already exists among some of the American-sponsored schools through their regional or country associations of schools. These elemental



associations could form the basis for a new kind of system's structure for institutional improvement overseas comprised by a limited number of "producer" schools that are committed to the task of resource building among a group of client or satellite "consumer" schools.

Some of the overseas schools already are associated with sister institutions or school systems in the United States, through an A/OS supported "school-to-school" program.<sup>16</sup> A smaller number of the overseas schools also are linked with certain United States universities in another A/OS sponsored "university-to-school" program.<sup>17</sup> These potential systems linkages could be assimilated into a new structure for personnel development, curriculum change, instructional innovation, and cross-cultural research and materials development.

Moreover, a few schools already have adopted the principle of re-training host country nationals for career teaching and related professional positions in the schools, first as a means of obtaining and holding quality teachers, and second as a means of neutralizing the potentially destructive effects of turnover among United States teachers.<sup>18</sup>

Given these strong beginnings, it would seem appropriate to assimilate these parsimoniously into major institution building strategies, namely:

1. Exchange the unqualified half of the teaching force in the American-sponsored schools for qualified teams of United States teachers who are pursuing advanced degrees.



2. While retraining the unqualified overseas teachers in special programs in the United States and in regional centers overseas, deploy the teams of United States graduate teachers as curriculum and instructional change agents in the overseas schools where they displace host country teachers temporarily.

3. Convert a limited number of the overseas schools into regional "resource building" centers in which: (a) to undertake appropriate research on cross-cultural problems in learning (and teaching), (b) to develop cross-cultural instructional materials, (c) to provide leadership training for United States and overseas school administrators, supervisors and career teachers, and (d) to offer technical assistance to a number of affiliated "satellite schools" that use the products of research in their own institution building endeavors, and field test new instructional systems and materials.

4. Use A/OS funding programs as categorical grants-in-aid to finance new personnel development programs and the support of overseas "resource building" centers.

5. Expand and deepen the participation of sister institutions in the United States by assimilating the "school-to-school" program into the proposed training, research, and materials development programs.

These elements of institution building strategy are not new, nor are they unique to the overseas situation.

They seem precisely appropriate to the overseas problem, however, in that: (1) they are responsive to the objectives established for assisting the American-sponsored schools overseas, and (2) they are complementary to and supportive of the systems development strategies proposed for those schools. Moreover, they appear to turn seemingly disadvantageous conditions in the overseas schools to an advantage, both for program improvement in the overseas schools and in certain United States educational institutions as well.

The ideas advanced here, however, are not original with the author. A similar strategy to institution development among inept rural schools was developed and instituted in 1967 by the New School of Behavioral Studies of the University of North Dakota with limited financial assistance from the United States Office of Education.<sup>19</sup> The concept of "producer/consumer" schools was developed first by the Institute for Development of Educational Activities (IDEA) of the C. F. Kettering Foundation in 1966, and acted out under the direction of Eugene Howard in a league of innovative elementary and secondary schools in the United States.<sup>20</sup>

In the late Fall of 1965, Michigan State University personnel, at the request of the author, prepared a prospectus that treated many of the ideas in a systematic way.<sup>21</sup> Later, in the early Spring of 1966, the Office of Overseas

Schools prepared a detailed document, under the direction of the author, incorporating many of these ideas into a planning proposal. Dr. Karl T. Hereford and Dr. Merlin G. Duncan of Michigan State University were the principal consultants and writers for this project.<sup>22</sup>

The overseas situation as described seems to call for a new combination of several of these earlier developed and expressed ideas. In general, what seems to be needed is a blending (1) of the training and program development strategy introduced in North Dakota by the New School of Behavioral Studies with (2) an older proposal by Michigan State University and A/OS to establish overseas "resource building" centers and (3) the IDEA concept of "product/consumer" schools. This the author has endeavored to accomplish in the following section.

#### Key Programs for Implementing Institution Building Strategies

The key programs that would seem most appropriate for implementing the institution building strategies advanced above are as follows: (1) a leadership development program for American-sponsored schools (incorporating the older "university-to-school program" of the Office of Overseas Schools); (2) Resource Building and Cross-Cultural Research Centers Overseas (incorporating the older "school-to-school program" of the Office of Overseas Schools); (3) a categorical grants-in-aid program. These programs may be described as follows.



Leadership Development Program

A principal objective to be achieved through this management strategy is the systematic upgrading of unqualified teachers and related personnel in the overseas schools. A secondary objective is to provide in the same program practical means whereby experienced teachers in the United States may serve as members of development teams overseas for one to three years as a means of improving their own competence and leadership capacity in the domestic United States schools.

A corollary objective of the leadership development program is the full implementation of the systems development programs described earlier, namely: enabling the American-sponsored schools within a reasonable time to place a qualified teacher in every classroom.

The leadership training program that is required would have three principal components. These are: (1) a teacher preparation and retraining program for overseas teachers, (2) a graduate training program for United States trained teachers in curriculum development and instructional innovation, and (3) allied graduate programs for counselors, librarians, administrators, and supervisors of overseas schools, and companion personnel in domestic United States schools. These are described below.

Retraining of Host Country and Third Country Nationals.--Approximately 1,400 host country and third country

nationals in 1968 were employed full time in the American-sponsored schools overseas. These teachers are not qualified fully by United States standards. Approximately 40 per cent of the teachers are employed in the schools of the American Republics. Many of these teachers have limited facility in English. Some have been trained only through high school (see Tables 17 and 18).

Despite substantial and obvious problems in re-training these teachers, it is advantageous to do so, particularly those host country nationals who have adopted teaching in the American-sponsored schools overseas as a career. The United States institutions that undertake the task of retraining these teachers will have to make several concessions in their regular academic programs, however. Two prototypes are available. Either could be adapted suitably for the purposes here.

First, the "certificate or diploma" program at Michigan State University which permitted normalista teachers with appropriate competence in English to be enrolled along with regular undergraduate and graduate students in Education in both on-campus and off-campus course offerings, under faculty guidance. A planned program involving forty-five quarter hours leads to a "diploma" or "certificate" for successful study. The forty-five hour program is planned for each individual and is intended to qualify the normalista teacher as United States trained.

An internship in a domestic United States school system normally was included in the program.<sup>23</sup>

Second, the retaining program for rural teachers at the University of North Dakota involves full time study on campus, beginning at year three, four, or five, depending upon the prior training of the teacher to be retrained.<sup>24</sup> In the third year, the teacher is engaged full time in pre-clinical studies; the fourth year provides a semester of clinical training, and the fifth year is devoted exclusively to advanced clinical research in a cooperating school.

The content of studies in both the MSU and UND programs are similar. They include: seminars and courses in behavioral sciences, in studies of human learning, and in inter-cultural relations, language, and educational management. Clinical studies include a substantive internship (practice teaching) in a cooperating United States school, under supervision of a qualified teacher and a clinical university professor.

If applied to the American-sponsored school situation, it should be feasible to retrain most of the 1,400 under-qualified nationals in approximately five years or less by contracting with one or more United States universities to provide appropriate training programs for them (using modifications of the MSU or UND approaches). However, it would be necessary also for the cooperating United States university to provide a complementary graduate

training program as well, because it will be necessary to replace the national teacher overseas with a qualified teacher during her period of retraining.

#### Graduate Teacher Training Program

Accordingly, it is proposed that a fifth and/or sixth year program be developed for United States teachers that would enable them to acquire their advanced degree while assigned as a member of a development team in one of the overseas schools. Such teachers may come from one of the cooperating "school-to-school" programs or from the growing surplus of teachers--particularly of early elementary and of social studies--who may be seeking an advanced degree in order to gain or sustain employment. The University of North Dakota program provides the appropriate model and prototype. The cooperating overseas schools could provide approximately 300 unqualified teachers for re-training each year. In exchange, 300 fully certified United States teachers could be assigned to replace the unqualified teachers for one to three years, as required, as an integral and viable part of their graduate study. However, this should not be a simple exchange program. The United States teachers should be assigned to overseas schools in development teams of two-five individuals. These teams serve as instructional program "change agents" in the schools. They are assigned broad development responsibilities under precisely stated conditions to implement part of



the program-financial plan established by the schools that are participating in the Guaranteed Services Program. To assure that their work is effective, two additional steps are taken. These ideas were field tested in the UND program, namely: (1) a clinical professor of education is assigned to provide field supervision for the development teams (the professor works out of regional resource building centers, offers in-service courses, provides technical assistance, and supervises development teams), and (2) leadership personnel within the cooperating schools (e.g., school director, instructional supervisor, other career teachers, etc.) are enrolled in related graduate study programs, a main object of their graduate study to be the support, reinforcement, replication, and adaptation of the development activities of the United States development teams.

The UND program provides for two summer school sessions of formal study and a full academic year as a graduate clinician in a cooperating school. This pattern of operation would seem to be readily adaptable to the overseas situation as well. Even conventional masters or sixth year requirements can be met by United States teachers through this format, provided that the supporting services can be established and maintained in regional centers overseas.

### Allied Graduate Training Programs

The American-sponsored schools overseas need counselors, librarians, supervisors, and administrators in increased numbers. If these personnel are already United States trained and merely require up-grading of training, suitable in-service programs could be developed through overseas regional centers. If they require substantive new training, they may be handled in much the same way that was proposed for overseas school teachers. If they are fully qualified but wish to up-grade certain skills, they can be enrolled in independent study programs or in supportive research and program development roles with the graduate United States teacher development teams. Indeed, it would be most appropriate for the librarian, counselor, supervisor, and school director (or lesser administrator) to be enrolled in a planned program of graduate or advanced graduate studies that focuses upon the development problems undertaken by the United States development teams assigned to their school. The same clinical professor who supervises the development well could be the advisor and program planner and reviewer for aspects of the graduate or advanced graduate training of such allied personnel as well.

### Resource Building Centers

In the Spring of 1966 study,<sup>25</sup> a proposal was made to convert up to twelve of the 128 American-sponsored schools to serve as clinical research and internship centers

for the graduate training program. "These would naturally become the first of the 'showcase' schools to be developed overseas," according to the proposal. Four major purposes were advanced for these centers, namely:

To produce needed new instructional materials, methods and technology, and to introduce these systematically into the practice of other "satellite" American-sponsored schools.

To provide appropriate in-service training institutes, workshops and seminars for personnel of other (satellite) American-sponsored schools within the region, and to provide technical assistance to those schools, as requested.

To provide appropriate "orientation" to teaching in the bi-cultural setting to new teacher recruits prior to their employment in American-sponsored schools in the region.

To provide "retraining" experiences for otherwise qualified professional personnel that are moving from one geographic area of the world to another.<sup>26</sup>

The overseas centers also would provide a homebase for clinical professors who supervise the development and graduate studies programs overseas. Moreover, the overseas centers should provide the setting for mounting a systematic research program to identify and explicate objectives for cross-cultural learning experiences for pupils both in the overseas schools and for pupils in United States domestic schools as well. Indeed, it is from this kind of research that the scope and content of new instructional materials should flow. The overseas center school in fact would become a "producer school:" producers of trained personnel, ideas, instructional technologies, and instructional

materials and systems. Cooperating "satellite" schools would examine, test, and adapt products of research, new instructional systems, media, and materials produced in the regional centers. A network of cooperating United States schools would counterpart the overseas structure for mutually beneficial projects.

#### Categorical Grants-in-Aid Program

The financing of personnel development, instructional improvement, and materials development programs will require financing over and above that contemplated for the Guaranteed Services Program. For the short term (i.e., during an initial three or four year period of development) a separate grants program might be maintained for this purpose. However, for the long term it would seem to be prudent to integrate the financing of these adjunct programs into the financial operations of the proposed quasi-public foundation, were such a foundation established to administer the Minimum Financial Assistance Program.

The 1966 study<sup>27</sup> provided some key insights into the probable levels of funding that would be required to develop the substantive institution building programs described above. Assuming a three year period for tooling up and working up to an annual capability to handle 300 or more American-sponsored school students and a companion number of United States teachers (an appropriate number of allied graduate majors in counseling, supervision, and

administration) the 1966 estimate for the development program to proceed in successive years ranged from \$1,267,360 in the first year, to \$3,258,767 in a second year, to \$4,359,067 in a third year. Costs in subsequent years were estimated to stabilize at or about \$4.5 million annually. A part of these sums could be provided by the Office of Overseas Schools without increasing the appropriation for that Office. A/OS could cover these costs in their entirety once other arrangements have been made to finance the Guaranteed Services Program.

#### Summary and Conclusions

In this chapter, the characteristics of the American-sponsored schools and their several assistance programs were reviewed, critiqued, and diagnosed. Two broad management strategies were developed and proposed to improve the schools. One of these was directed principally toward constructing a viable and functional system of schools from among the 128 American-sponsored schools overseas. The second strategy was aimed principally at building new institutional capabilities within individual schools, principally by means of a unique kind of personnel and instructional program development program.

The two strategies and their specific programs are complimentary. Indeed, the ultimate success of one is dependent upon the success of the other. For example: to equalize services among the American-sponsored schools it

was deemed necessary to define common standards of service to be guaranteed in the schools and to establish appropriate financial assistance and incentives to the schools to attain these standards. However, the schools lack the personnel capability to implement the Guaranteed Services Program even if additional funds were made available. Therefore, the institution building strategy was designed in ways calculated to meet this systems requirement as well. The personnel development program--which also serves as the basic program innovation device--is designed to retrain underprepared overseas teachers while at the same time to involve experienced United States teachers who are pursuing graduate degrees as their temporary replacements overseas. The financial assistance program, therefore, could be geared precisely to the output of the teacher training programs, so that additional funds could be made available to the schools precisely in accordance with their acquisitions of fully qualified personnel.

## FOOTNOTES

<sup>1</sup>Charles P. Loomis, Social Systems (Princeton, N.J.: D. Van Nostrand Company, Inc., 1960).

<sup>2</sup>Bob King, "The Recruitment, Selection, and Retention of Teachers for Overseas Schools," (unpublished Ed.D. dissertation, Wayne State University, 1968), pp. 189-190.

<sup>3</sup>Loomis, Social Systems, Chapter 1.

<sup>4</sup>Jay Anthony, Management and Machiavelli (New York: Holt, Rinehart, and Winston, 1967), Chapter Two.

<sup>5</sup>Mort, Reusser, and Polly, Public School Finance (3rd ed.; New York: McGraw-Hill Book Co., 1960).

<sup>6</sup>Committee on Educational Finance, Financing Public Schools (Washington, D.C.: National Education Association, 1965), p. 64.

<sup>7</sup>For example:

- (a) In thirty state minimum foundation programs
- (b) The Kellogg Foundation Program in Educational Administration (CPEA)
- (c) The Ford Foundation International Education Consortium.

<sup>8</sup>Financing Public Education, NEA, p. 64.

<sup>9</sup>Educational Development for North Dakota, 1967-1975: The Overview (Grand Forks, N.D.: University of North Dakota Press, 1967), p. 27.

<sup>10</sup>American Association of School Librarians Standards Committee.

<sup>11</sup>Financing Public Education, NEA, p. 47.

<sup>12</sup>King, "Recruitment," pp. 165-170.

<sup>13</sup>A Plan of Public Expenditure for Education in North Dakota: The Foundation Program (Grand Forks, N.D.: University of North Dakota Press, 1967), pp. 8-12.

<sup>14</sup>Ibid., p. 9.

<sup>15</sup>A Plan of Developing and Placing Educational Personnel in the North Dakota Public Schools (Grand Forks, N.D.: University of North Dakota Press, 1967), p. 33.

<sup>16</sup>Developing School-to-School Projects (Washington, D.C.: American Association of School Administrators, 1969), p. 12.

<sup>17</sup>Finis E. Engleman and Paul T. Luebke, The Mission Called O/OS (Washington, D.C.: AASA, 1966), pp. 44-45.

<sup>18</sup>The recommendation to accept United States trained host country nationals as career professionals at each grade level and in each key subject area first was made in 1960 in El Colegio Americano Hacia El Futuro, a report of a self-study conducted by the American School Foundation of Mexico City, with assistance from professors from Michigan State University. That recommendation led to the establishment of a special "certificate or diploma" program for Mexican normalistas employed by the American School to complete a formal training program at Michigan State University. Forty-five normalistas have been enrolled in the special training program. Seven had completed the forty-five hour program by 1969, according to MSU authorities.

<sup>19</sup>A Plan, Developing and Placing Educational Personnel in North Dakota, pp. 1-16.

<sup>20</sup>"Long Range Plans for Educational Development" (unpublished manuscript provided the author by IDEA; Dayton, Ohio: C. F. Kettering Foundation).

<sup>21</sup>"A Prospectus for Preparing Personnel for Overseas Schools" (Michigan State University, November 1965), 15 pp. (Mimeographed)



<sup>22</sup>Merlin G. Duncan and Karl T. Hereford, "Preparing Leadership Personnel for American-Sponsored, Bi-Cultural Schools Overseas" (Washington, D.C.: Office of Overseas Schools, United States Department of State, March, 1966), 35 pp. (Mimeographed)

<sup>23</sup>"Preparing Leadership Personnel," p. 13.

<sup>24</sup>Developing Educational Personnel, p. 31.

<sup>25</sup>"Preparing Leadership Personnel," p. 19.

<sup>26</sup>Ibid., p. 35.

<sup>27</sup>Ibid., pp. 36-39.

## CHAPTER V

### CRITIQUE AND CONCLUSIONS

In Chapter IV, a major management strategy was proposed to achieve objectives for the overseas education of United States elementary and secondary school pupils. In this chapter, the principal elements of that strategy are reviewed critically, and conclusions are drawn with respect to the feasibility of the strategy as proposed. The problem around which this chapter is developed may be stated, therefore, as follows: how feasible is the proposed strategy to implement during the foreseeable future? The feasibility both of the proposed systems development strategies and the institution building strategies are discussed below.

#### Feasibility of Systems Development Strategy

Conceptually, there should be no insurmountable problems with the proposed strategies for establishing a functional system of schools from the 128 American-sponsored schools overseas. Making that system responsive to the overseas requirements of United States pupils also poses no conceptual problems. Indeed, analogous situations abound, and the treatments applied in analogous United States

settings demonstrate the essential practicality of the ideas as advanced. For example, minimum foundation programs have been established in thirty states. The IDEA program of the C. F. Kettering Foundation also illustrates the feasibility of a common funding source creating a functional system of schools by means of a common grants-making program and plan.

Building consensus among these schools for a minimum program of services to be guaranteed United States pupils overseas presents certain practical problems, however. Agreement must be obtained among the 128 American-sponsored schools and among regional accrediting associations in the United States with respect to world-wide accrediting standards. Work now is progressing in this area of concern. Key schools and the accrediting associations themselves are taking the lead to identify basic standards for accreditation of the 128 American-sponsored schools. These standards will specify requirements for personnel, instructional materials and related instructional services, as well as for school plant and facilities. A report of their work should be ready in 1971. Once these standards have been developed, it should be relatively simple for experts to convert them into elements of a guaranteed services program for financial support by a common funding agency.

The number of dollars needed to equalize services among the overseas schools and to normalize differences in their fiscal capacities would not seem to be out of reach.

For example: to support an average expenditure level of \$650 per pupil would require about the equivalent of 130 United States dollars per pupil<sup>1</sup> of outside financing. This is exclusive, of course, of categorical grants-in-aid for personnel and program development, research, and technical assistance, and for support of the proposed "resource building" centers. A subsidy of \$130 per pupil compares favorably with ongoing aid programs for compensatory education. For example, in 1969-70 the Office of Education provided approximately \$119 per pupil for compensatory programs for disadvantaged pupils.<sup>2</sup> Moreover, the Office of Overseas Schools now could support about one-half of the approximately \$7,800,000 it would require to initiate a basic support program at the level of \$130 per pupil (60,000 pupil enrollment). To use these funds, however, the A/OS necessarily would have to eliminate most of its present categorical aid programs. Were the A/OS funds (approximately \$4,500,000 in fiscal year 1970) retained solely for support of the categorical aid programs cited under the institution development strategy, then a new government/business foundation would need to raise the full \$7,800,000. The Congress might feasibly provide two-thirds of that amount, or \$5,200,000 over and beyond present appropriation levels. The United States business and corporate community with overseas interests might well subscribe the balance. Indeed, an average \$5,000 annual

subscription from 500 such firms would be all that would be required. This falls well within the fund raising experience to date with a large number of these United States business firms.

Nor should the establishment of a quasi-public agency itself pose insuperable problems. The Congress has established roughly similar organizations before, to good effect. For example: the Smithsonian Institution<sup>3</sup> in Washington, D.C. was created by an Act of Congress on August 10, 1846. Legislative proposals to this effect could be drafted by the American Association of School Administrators (AASA), upon recommendations framed by the Association for the Advancement of International Education (AAIE) for inclusion either in bills to be administered by the Department of Health, Education, and Welfare, or the Department of State. The latter would appear to be a more likely choice, in view of its current overseas commitments through the Office of Overseas Schools.

The specific means for distributing funds to secure the proposed guaranteed services program poses certain practical problems that will require further study before implementing. For example, the potential impact on the 128 American-sponsored schools of several alternative distribution formulas should be examined empirically before adoption of any particular formula. Particularly nettlesome is the problem of determining a fair local school share from

tuition in the equalization provision of any distribution formula. The quality controls suggested by the management strategy, however, already have been tested in analogous situations. For example, several state education systems have supported local school districts at differential rates depending upon the number and deployment of qualified schools personnel in the districts. West Virginia, for example, has done so for thirty-five years. A similar method for relating the level of financial support to school (or school district) performance was advocated for certain national schools in Central America.<sup>4</sup> Hence, this provision of the strategy would not seem to be improper or infeasible. (However, little is accomplished if the minimum support program is not complemented by a personnel development program that enables each school in fact to provide qualified United States trained personnel in all key positions, as stipulated by the Guaranteed Services Program.)

Finally, there would seem to be no insurmountable problems associated with the introduction of key management agencies in the planning activities of the overseas schools. Indeed, involving management assistance systematically in the program-financial planning and application for funds procedures should be attractive both to the Congress and to the corporations that would be tapped for financial support of the overseas schools.

Feasibility of Institution Building Strategies

The proposal to establish a new kind of personnel development program through which to qualify key personnel in the American-sponsored school overseas does not seem to be impractical. A proposal along similar lines was drawn as early as 1965 by one of the United States universities involved in the Latin American Republics area.<sup>5</sup> The key provision of the personnel development program also is sound, namely: the assignment of development teams of graduate students as change agents in the overseas schools. This aspect of the proposed institution building strategy has been developed and perfected in one of the Nation's leading teacher training programs.<sup>6</sup> Adapting graduate training programs in cooperating universities in the United States to accept this key provision may pose a problem for some institutions. However, the North Dakota program has demonstrated beyond doubt that graduate teacher/students, when assigned in development teams, are effective change agents in isolated schools, as well as effective innovative agents in schools of larger population centers.<sup>7</sup> The growing surplus in teacher supply in the United States also is advantageous for staffing these development teams. The Bureau of Labor Statistics estimates that there may develop as early as 1970 a surplus of approximately 40 per cent in the teaching force in the United States.<sup>8</sup> Accordingly, there should be no adverse problem in recruiting experienced teachers into the proposed graduate training programs.

The third key provision of the proposed institution building strategy is the overseas regional "resource building" center, with its "producer/consumer" or satellite school programs. The supporting infra-structure for such a program, of course, already exists in the "School-to-School" and "University-to-School" programs supported in part by the Office of Overseas Schools.

The principles involved in the "producer/consumer" school relationship herein proposed already have been applied with considerable success through the innovative schools program of the Institute for Development of Educational Activities (IDEA) of the C. F. Kettering Foundation.<sup>9</sup> More directly pertinent is the experience of regional educational laboratories in the United States.<sup>10</sup> Each of these has demonstrated the efficiency and feasibility of incorporating several resource building activities together on one site to good effect. In the proposed program, the regional "resource building" centers--located in certain American-sponsored schools overseas--provide for personnel development and leadership training, research, materials development, and technical assistance services.

Conceptually, the idea of employing the overseas bi-cultural schools as resources for new instructional materials development seems sound. The practical problems to be addressed in this area, however, will require careful and systematic study before implementing, primarily because



the objectives and limitations of cross-cultural programs have not been developed and explicated adequately outside the area of bilinguality. Nonetheless, the task is challenging, and the rewards potentially great. If a pilot program and field test were to establish the practicality and utility of the overseas centers as materials development enterprises, there should be no problem in merchandizing and disseminating those materials through an expanded school-to-school network. Linkages then could be established with additional United States schools for consumption of materials through the active involvement of State departments of education in the proposed program.

The cost of the proposed development program does not seem to be infeasible. Indeed, the Office of Overseas Schools could meet most if not all of the categorical costs itself, were the costs of the Guaranteed Services Program met from other sources.

Moreover, the methodology for distributing categorical financial aid in ways calculated to assure quality of client performance already has been developed and applied in analogous situations. Performance contracts in education, for example, have been employed by the United States Office of Education in approximately ninety school districts. Several of these districts in turn have developed performance contracts to govern the involvement of private contractors in undertaking contract instructional programs

for pupils with exceptional learning problems. The concept of the accomplishment audit also has been developed and applied in the cases cited above, and training programs have been instituted to prepare professional program auditors.<sup>11</sup>

The most immediately infeasible task is the full implementation of the overall strategy itself. Although many important elements in the strategy are extant and some already are pointed in the desired direction, it would not seem wise immediately to undertake to implement the whole strategy among the 128 American-sponsored schools overseas and counterpart systems in the United States without first undertaking a major pilot development and field testing program. This might be undertaken most readily among the American-sponsored schools in the American Republics, by reason of their proximity to the United States and by reason of the fact that most of the United States schools' and universities' bi-national program experience has been acquired there.

For the immediate future, a field test involving one of two "resource building centers" in Latin America might be developed, with a personnel development program involving approximately 100 host country teachers each year for three years and about 100 graduate United States teachers divided into an appropriate number of development teams. The initial cost to develop this program might be borne directly by the Office of Overseas Schools, and

continued until the enactment of legislation creating a government/business foundation with funds sufficient to underwrite a Guaranteed Services Program.

### Summary and Conclusions

This thesis was developed as a means of identifying and explicating one or more strategies for improving the effectiveness of education for United States elementary and secondary pupils overseas. Pursuing this purpose, three key steps were taken, as follows:

1. Two primary aims or conditions for the overseas education of United States pupils were postulated. These were: (1) the right of parents to exercise a reasonable "freedom of choice" in the selection of an educational program for their children while assigned overseas by their government or business employer, and (2) the responsibility an appropriate and equal educational opportunity for all United States pupils overseas that are so affected.
2. Four major objectives for United States sponsored improvement programs were derived, namely:
  - a. Equalizing educational services among the 128 American-sponsored schools overseas that prepare United States elementary and secondary school pupils;

- b. Normalizing the great variance in the fiscal capabilities of these schools to support minimumly acceptable educational programs for these pupils;
  - c. Equalizing the educational performance of United States pupils among the overseas schools, and
  - d. Renewing the capabilities of the American-sponsored schools, both as educational and as cultural institutions.
3. Five key actions were proposed to achieve these objectives. These were:
- a. Establish world-wide standards for American-sponsored schools overseas.
  - b. Incorporate those standards into a "guaranteed services program" designed to eliminate place of residence as a major determinant of the quality of services available to United States pupils overseas.
  - c. Establish a new United States government/business foundation to provide funds needed to secure the provisions of a "guaranteed services program" under conditions of performance contracts with those schools, thereby creating in effect a functional overseas school system.

- d. Assimilate on-going university-to-school and school-to-school programs into a new comprehensive personnel development and resource building program that will provide needed competence and capability in the overseas schools for institutional self-renewal.
- e. Alter the bases for financial assistance to the overseas schools from grants-in-aid to performance contracts based on each school's carefully constructed program-financial plan. Satisfactory school performance would be verified annually in accordance with contract requirements by means of independent accomplishment audits. Incentive grants would be made to those schools that meet all contract specifications in accordance with negotiated standards of performance.

When the proposed strategies were examined for practical feasibility, they were deemed to be conceptually sound, and in most cases capable of intermediate to long-term implementation. A pilot development and field testing program of the several activities was proposed for immediate implementation in the American Republics.

## FOOTNOTES

<sup>1</sup>Since the comparative value of 130 United States dollars will vary from place to place around the world, a method would have to be adopted that would take this into account thus guaranteeing equal compensation to each school. The Overseas Differentials and Allowances Act (PL 86-707) was set up to handle such problems in supporting government personnel abroad; some of the procedures used to equalize payments may be used in this instance.

<sup>2</sup>Education of Disadvantaged Pupils: An Evaluative Report of ESEA Title I (Washington, D.C.: Office of Planning and Evaluation, Bureau of Elementary and Secondary Education, United States Department of Health, Education and Welfare, Office of Education, 1970).

<sup>3</sup>The Smithsonian Institution is legally an establishment having as its members the President of the United States, the Vice President, the Chief Justice, and the members of the President's Cabinet. It is governed by a Board of Regents, consisting of the Vice President, the Chief Justice, three Members each of the United States Senate and the House of Representatives, and six citizens of the United States appointed by joint resolution of Congress. The Secretary of the Institution is its executive officer and the director of its activities.

The Smithsonian Institution administers a number of Government programs placed under its control by the Congress and funded by Federal appropriations. The Institution itself is a charitable, nonprofit corporation. It receives and administers contracts and grants and accepts gifts and bequests from both private and public sources. These activities are administered in its capacity as a private organization. The Smithsonian's functions are dual, being both private and governmental.

<sup>4</sup>Karl T. Hereford, Plan de Gastos Publicos para la Educacion en America Central (Guatemala, Central America: IIME, 1964), pp. 28-32.

<sup>5</sup>"Prospectus for Preparing Personnel for Overseas Schools" (Michigan State University, November, 1965).

<sup>6</sup>A Plan Developing and Placing Educational Personnel in North Dakota Public Schools (University of North Dakota Press, Grand Forks, N.D., 1967).

<sup>7</sup>Ibid.

<sup>8</sup>Testimony before the U.S. Congress, December, 1969, by Director: Bureau of Labor Statistics.

<sup>9</sup>Eugene Howard, "The Innovative Schools Program" (unpublished document: IDEA, Dayton, Ohio, 1966).

<sup>10</sup>Regional educational laboratories are private corporations supported under provision of ESEA IV (P.L. 89-10). The laboratories sponsor development and assistance programs to schools and school systems in specific multi-state regions.

<sup>11</sup>In NDEA Institute conducted in Summer, 1969, by Northern Illinois University.

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## APPENDICES

APPENDIX A

THE 128 AMERICAN-SPONSORED ELEMENTARY AND SECONDARY  
SCHOOLS OVERSEAS ASSISTED BY THE UNITED STATES  
DEPARTMENT OF STATE IN SCHOOL YEAR 1968-69

## APPENDIX A

### THE 128 AMERICAN-SPONSORED ELEMENTARY AND SECONDARY SCHOOLS OVERSEAS ASSISTED BY THE UNITED STATES DEPARTMENT OF STATE IN SCHOOL YEAR 1968-69

#### Europe

American International School, Vienna, Austria  
Anglo-American School of Sofia, Sofia, Bulgaria  
International School of Prague, Prague, Czechoslovakia  
Copenhagen International School, Copenhagen, Denmark  
The American School in London, London, England  
The American School of Paris, Paris, France  
John F. Kennedy School, Berlin, Germany  
The Frankfurt International School, Frankfurt, Germany  
Munich International School, Munich, Germany  
American Embassy School of Reykjavik, Reykjavik, Iceland  
American School of Genoa, Genoa, Italy  
American Community School of Milan, Milan, Italy  
Overseas School of Rome, Rome, Italy  
The American International School of Torino, Torino, Italy  
International School of Trieste, Trieste, Italy  
The American School of the International Schools of the  
Hague, The Hague, Netherlands  
The American School of Warsaw, Warsaw, Poland



The American School of Bucharest, Bucharest, Romania  
 The American High School of Barcelona, Barcelona, Spain  
 American School of Bilbao, Bilbao, Spain  
 American School of Las Palmas, Las Palmas de Gran Canaria,  
 Spain  
 The American School of Madrid, Madrid, Spain  
 Anglo-American School of Stockholm, Stockholm, Sweden  
 The International School of Zurich, Zurich, Switzerland  
 English Speaking School of Bern, Bern, Switzerland  
 Anglo-American School, Moscow, U.S.S.R.  
 International School of Belgrade, Belgrade, Yugoslavia  
 The American School of Zagreb, Zagreb, Yugoslavia

#### Africa

American School of Algiers, Algiers, Algeria  
 The American School of Kinshasa, Kinshasa, Republic of the  
 Congo  
 International School of Yaounde, Yaounde, Cameroon  
 American Community School, Addis Ababa, Ethiopia  
 Lincoln Community School, Accra, Ghana  
 The American Community School, Conakry, Guinea  
 United States Community School, Nairobi, Kenya  
 American Cooperative School, Monrovia, Liberia  
 American Community School, Benghazi, Libya  
 Rabat American School, Rabat, Morocco  
 American School of Tangier, Tangier, Morocco  
 International Secondary School, Ibadan, Niveria  
 American International School, Lagos, Nigeria

American School, Mogadiscio, Somalia

The International School of Tanganyika, Dar-es-Salaam,  
Tanzania

American Cooperative School of Tunis, Tunis, Tunisia

The Lincoln School, Kampala, Uganda

Near East and South Asia

American Community School of Lashkar Gah, Kabul, Afghanistan

American International School, Kabul, Afghanistan

American Community School of Kandahar, Kabul, Afghanistan

Oversea Children's School, Colombo, Ceylon

The Junior School, Nicosia, Cyprus

American Community Schools of Athens, Inc., Athens, Greece

American Community School of Rhodes, Rhodes, Greece

Pinewood Schools of Thessaliniki, Inc., Thessaloniki, Greece

The Bombay International School, Bombay, India

American International School, Calcutta, India

American International School, New Delhi, India

American School of Tehran, Tehran, Iran

American International School of Israel, Inc., Tel Aviv,  
Israel

American Community School, Amman, Jordan

The American School, Hawalli, Kuwait

American Community School, Beirut, Lebanon

Lincoln School of Kathmandu, Kathmandu, Nepal

Dacca American Society School, Dacca, East Pakistan

Karachi American Society School, Karachi, Pakistan

Lahore American School, Lahore, Pakistan

International School of Islamabad, Rawalpindi, West Pakistan  
 Dhahran Academy, Dhahran, Saudi Arabia  
 Parents' Cooperative School Heddah, Saudi Arabia  
 Cairo American College, Cairo, U.A.R.

#### East Asia

The International School, Rangoon, Burma  
 Hong Kong International School, Hong Kong, B.C.C.  
 Joint Embassy School, Djakarta, Indonesia  
 Hiroshima International School, Hiroshima-City, Japan  
 Nagoya International School, Moriyama-ju, Nagoya, Japan  
 Hokkaido International School, Sapporo, Hokkaido, Japan  
 The American School (Japan), Tokyo, Japan  
 The American School of Vientiane, Vientiane, Laos  
 The International School of Kuala Lumpur, Kuala Lumpur,  
 Malaysia  
 The American School (Manila), Makati, Rizal, Philippines  
 Singapore American School, Singapore  
 Taipei American School, Taipei, Taiwan  
 International Schools of Bangkok, Bangkok, Thailand

#### Central and South America

American Community School, Buenos Aires, Argentina  
 Pan American School of Bahia, Salvador, Bahia, Brazil  
 American Cooperative School, Belo Horizonte, Brazil  
 American School of Brasilia, Brasilia, Brazil  
 American School of Campinas, Campinas, Sao Paulo, Brazil  
 The International School of Curitiba, Curitiba, Parana,  
 Brazil



Pan American School of Porto Alegre, Porto Alegre, Brazil  
The American School of Recife, Recife, Pernambuco, Brazil  
American School of Rio de Janeiro, Rio de Janeiro, Brazil  
American School of Santos, Santos, Sao Paulo, Brazil  
The American Elementary and High School, Sao Paulo, Brazil  
Cochabamba Cooperative School, Cochabamba, Bolivia  
American Cooperative School, La Paz, Bolivia  
Anglo-American School, Oruro, Bolivia  
Santa Cruz Cooperative School, Santa Cruz, Bolivia  
The International School--Nido de Aguilas, Santiago, Chile  
Karl C. Parrish School, Barranquilla, Colombia  
Pan American School, Bucaramanga, Colombia  
Colegio Neuva Granada, Bogota, Colombia  
Colegio Bolivar, Cali, Colombia  
George Washington School, Cartagena, Colombia  
The Columbus School, Medellin, Colombia  
Lincoln School, San Jose, Costa Rica  
Carol Morgan School, Santo Domingo, Dominican Republic  
American School of Guayaquil, Guayaquil, Ecuador  
American School of Quito, Quito, Ecuador  
American School, San Salvador, El Salvador  
The American School of Guatemala, Guatemala, Guatemala  
Mayan School, Guatemala, Guatemala  
Union School, Port-au-Prince, Haiti  
The International School, San Pedro Sula, Honduras  
The American School, Tegucigalpa, Honduras



The Priory School, Kingston, Jamaica

The American School of Durango, Durango, Mexico

American School of Guadalajara, Guadalajara, Mexico

American School Foundation, Mexico, D. F., Mexico

American School Foundation of Monterrey, Monterrey, Mexico

American School of Pachuca, Pachuca, Mexico

The American School of Puebla, Puebla, Mexico

The American School of Torreon, Torreon, Mexico

American-Nicaraguan School, Managua, Nicaragua

The American School of Asuncion, Asuncion, Paraguay

Anglo-American Prescott School, Arequipa, Peru

American School of Lima, Lima, Peru

Uruguayan American School, Mercedes, Uruguay

Uruguayan American School, Montevideo, Uruguay

## APPENDIX B

### FACT SHEET



## APPENDIX B

### FACT SHEET

American International School  
c/o American Embassy  
Lagos, Nigeria 1969-1970

The American International School in Lagos, Nigeria is a private, co-educational school which offers an educational program from kindergarten through ninth grade for students of all nationalities. The school was founded in 1964. The school year comprises two semesters extending from September to January and from February to June.

Organization: The school is governed by a 9-member Board of Directors elected for one year by the American International School Association of Lagos, Nigeria, the sponsors of the school. Membership in the Association is automatically conferred on the parents or guardians of children enrolled in the school.

Curriculum: The curriculum is that of general United States college preparatory public schools. The school testing program includes the Iowa Test of Basic Skills. Instruction is in English. French is taught as a foreign language. Art and physical education are included in the curriculum.

Faculty: There were twenty-two full-time and three part-time faculty members in the school year 1968-69, including sixteen United States citizens.

Enrollment: Enrollment at the opening of the school year 1968-69 was 322, including 232 United States citizens, 30 host country nationals, and 60 children of sixteen other nationalities. Of the United States enrollment, 88 were dependents of United States Government direct-hire or contract employees, 133 were dependents of United States business and foundation employees, and 11 were dependents of other private citizens. Elementary (1-8) enrollment was 302 and senior high school, grade 9, enrollment was 20.

Facilities: The school plant is composed of an exhibits building which accommodates the lower grades, the library, the psychologist's office, the dispensary, and the superintendent's office, and a new section for upper grades and a teacher's lounge. Another temporary building is used for shop work and physical education. Play space is inadequate.

Finances: In school year 1969-70 about 97 per cent of the school's income was derived from tuition. As of October, 1969, the annual tuition rates were \$600 for kindergarten, and \$1,200 for grades 1 through 9.

Statistics as of October 1, 1969





## APPENDIX C

### OVERSEAS SCHOOLS QUESTIONNAIRE

DEPARTMENT OF STATE  
**OVERSEAS SCHOOLS QUESTIONNAIRE**

This questionnaire should be completed in cooperation with the local Foreign Service post by those overseas schools which have received assistance under the Overseas Schools Program in the past and/or desire to request assistance under that Program. The educational programs of schools requesting assistance should meet the policies and criteria for assistance set out in 2 FAM 600. The information for completing this questionnaire should be provided by the chief administrative official of the American-Sponsored school at post. It should be reviewed by the governing board of the school and by the responsible officials at the post prior to transmittal by the post to the Department, Subject: OVERSEAS SCHOOLS. In order that information from various posts may be comparable, all data should be as of October 1. The original and two copies of the completed questionnaire should be sent from the post by November 1.

JST	DATE REPORT PREPARED BY SCHOOL
-----	--------------------------------

**A. GENERAL INFORMATION**

NAME OF SCHOOL ASSOCIATION \_\_\_\_\_

NAME OF SCHOOL \_\_\_\_\_

LOCAL ADDRESS OF SCHOOL \_\_\_\_\_

MAILING ADDRESS OF SCHOOL TO BE USED BY U.S. CORRESPONDENTS \_\_\_\_\_

3. NAME AND SIGNATURE OF PERSON PREPARING REPORT \_\_\_\_\_

5b. TITLE \_\_\_\_\_

3. NAME AND SIGNATURE OF GOVERNING BOARD OFFICIAL REVIEWING REPORT \_\_\_\_\_

6b. TITLE \_\_\_\_\_

9. NAME OF OFFICIAL AT FOREIGN SERVICE POST RESPONSIBLE FOR COORDINATING POST'S INTEREST IN SCHOOL ACTIVITIES \_\_\_\_\_

7b. GRADE AND JOB TITLE \_\_\_\_\_

4. ENCIRCLE GRADES INCLUDED IN SCHOOL (do not include correspondence courses)

K   1   2   3   4   5   6   7   8   9   10   11   12

5. INDICATE SCHOOL ORGANIZATION

a. Elementary includes grades \_\_\_\_\_ through \_\_\_\_\_      b. Intermediate includes grades \_\_\_\_\_ through \_\_\_\_\_

c. High School includes grades \_\_\_\_\_ through \_\_\_\_\_

(If other names are used such as "Lower School", "Junior High School", "Primary", etc., please substitute the proper name. If one or more categories do not apply, leave blank.)

6. ENCIRCLE GRADES IN WHICH SUPERVISED CORRESPONDENCE WORK IS OFFERED

K   1   2   3   4   5   6   7   8   9   10   11   12   None

Indicate Correspondence course(s) used: \_\_\_\_\_

11a. GIVE OPENING AND CLOSING DATES OF EACH SCHOOL TERM (Attach copy of complete school calendar, including holidays)

11b. GIVE TOTAL NUMBER OF DAYS OF INSTRUCTION, EXCLUDING HOLIDAYS \_\_\_\_\_

12. IS THE SCHOOL ACCREDITED BY A U.S. REGIONAL ACCREDITING AGENCY? \_\_\_\_\_ If Yes, give name of accrediting organization and date of accreditation. If No, what steps have been taken toward securing accreditation?

13. IS THE SCHOOL ACCREDITED OR APPROVED BY ANY OTHER EDUCATIONAL AUTHORITY INCLUDING LOCAL AUTHORITIES? Describe nature of accreditation.

14. HAS AN UP-DATED COPY OF THE SCHOOL'S CONSTITUTION AND BY-LAWS BEEN SUBMITTED TO THE OFFICE OF OVERSEAS SCHOOLS WITHIN THE PAST TWO YEARS? YES \_\_\_\_\_ NO \_\_\_\_\_. IF NOT, KINDLY ENCLOSE A COPY.

15. KINDLY ENCLOSE A COPY OF THE MOST RECENT EDITION OF THE SCHOOL'S CATALOG AND/ OTHER DESCRIPTIVE PUBLICATIONS.

## OFFICIAL NAME OF THE GOVERNING BOARD

## Name

**Position on Board**

### Nationality

**Regular Work Affiliation**  
(see note for code)\*

**Date Term  
Began**

**Date Term Expires**

**\*Use following symbols to identify work affiliation: A - U.S. Government; B - Host Country Government; C - Third Country Government; D - Business firm; E - Other. If board member is a wife or other dependent with no work affiliation in own right, use above letters to show category of employment of person supporting board member followed by a dash and the number 1, Eg. A - 1. Provide description after symbol, Eg. A - 1 - Wife Embassy Administrative Officer; or D - Treasurer Ajax Oil Co.**

**1a. NAME OF CHIEF ADMINISTRATOR**

b. OFFICIAL DESIGNATION OR TITLE

c. DATE ENTERED ON DUTY

d. DATE CONTRACT TERMINATES

**2. ON FORM FS-573A, PROVIDE INFORMATION FOR ALL PROFESSIONAL STAFF MEMBERS OF THE SCHOOL ACCORDING TO THE CATEGORIES LISTED THEREON AND ATTACH TO THIS QUESTIONNAIRE.**

D. STUDENT BODY

1. IDENTIFY STUDENTS ENROLLED AS OF OCTOBER 1 ACCORDING TO THE FOLLOWING CATEGORIES: (Ensure components add to proper totals):

TOTAL NUMBER

U.S. CITIZENS:

A - 1. Dependents of direct hire U.S. Government employees, except Department of Defense:

Provide breakdown: Department of State: \_\_\_\_\_ ; USAID: \_\_\_\_\_ ; USIS: \_\_\_\_\_ ;

Peace Corps: \_\_\_\_\_ ; Dept. of Agriculture: \_\_\_\_\_ ; Dept. of Commerce: \_\_\_\_\_ ;

Others (Identify): \_\_\_\_\_  
\_\_\_\_\_

Subtotal: \_\_\_\_\_

A - 2. Dependents of Department of Defense employees, including civilian employees:

Provide breakdown: Military Attaches: \_\_\_\_\_ ; MAAG: \_\_\_\_\_ ;

Other: Army Forces: \_\_\_\_\_ ; Navy Forces: \_\_\_\_\_ ; Air Forces \_\_\_\_\_ ;

Subtotal: \_\_\_\_\_

A - 3. Dependents of personnel contracted to U.S. Government Agencies:

Provide breakdown by U.S. agency sponsoring contract and identify by business firm or institution: \_\_\_\_\_  
\_\_\_\_\_

Subtotal \_\_\_\_\_

A - 4. Dependents of other U.S. citizens (do not include dependents listed above):\*

Subtotal \_\_\_\_\_

HOST COUNTRY NATIONALS:\*

THIRD COUNTRY NATIONALS:\*

Provide breakdown of number of dependents by country: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TOTAL ENROLLMENT

ATTACH LIST SHOWING EMPLOYMENT AFFILIATION OF THOSE ENROLLING STUDENTS IN CATEGORIES A - 4, B, and C, ACCORDING TO FOLLOWING FORMAT:

AFFILIATION OF PARENT

NUMBERS OF STUDENTS

1. Names of U.S. and U.S. - affiliated Business Firms
  2. Names of other Business Firms
  3. Names of Religious Organization
  4. UN and UN Agencies (no breakdown by name of agency required)
  5. Fulbright Grantees
  6. Names of Governments (Including U.S. Government for categories B and C)
  7. Others (By name where feasible)
- Totals

A - 4	B	C
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. SHOW NUMBERS OF STUDENTS BY GRADE ACCORDING TO THE SIX CATEGORIES ABOVE

Grade	Categories						Total
	A - 1	A - 2	A - 3	A - 4	B	C	
K							
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
Total							

## 3. SHOW NUMBER OF STUDENTS RECEIVING SCHOLARSHIP AID ACCORDING TO FOLLOWING TABULATION

3. SHOW NUMBER OF STUDENTS RECEIVING SCHOLARSHIP AID ACCORDING TO FOLLOWING TABULATION									
GRADE	HOST COUNTRY NATIONALS				U.S. NATIONALS		THIRD COUNTRY NATIONALS		TOTAL
	School Sponsored		U.S. Government Sponsored		School Sponsored		School Sponsored		
	FULL	PARTIAL	FULL	PARTIAL	FULL	PARTIAL	FULL	PARTIAL	
K									
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
Total									

PLEASE PROVIDE THE FOLLOWING INFORMATION CONCERNING EXPENDITURES FOR SCHOLARSHIPS: (Express in terms of U.S. dollars)

- a. Expenditures financed from U.S. Government grants \$ \_\_\_\_\_
- b. Expenditures from school budget excluding U.S. Government grants \$ \_\_\_\_\_
- c. Total expenditures for scholarships \$ \_\_\_\_\_

## E. SCHOOL FINANCES

PROVIDE ANNUAL TUITION RATE(S) FOR THE CURRENT SCHOOL YEAR, EXPRESSED IN TERMS OF U.S. DOLLARS. IDENTIFY GRADE(S) TO WHICH EACH RATE APPLIES IF THERE IS MORE THAN ONE RATE.

. APPROXIMATELY WHAT PERCENTAGE OF THE SCHOOL'S TOTAL TUITION IS RECEIVED IN U.S. DOLLARS?

. SHOW GIFTS AND BEQUESTS RECEIVED DURING THE PAST SCHOOL FISCAL YEAR, EXCLUDING U.S. GOVERNMENT GRANTS, ACCORDING TO THE FOLLOWING TABLE. GIVE ESTIMATED VALUE OF GOODS OR SERVICES RECEIVED IN KIND.

Source (Give Name)	Value in \$US Equivalent	Describe nature of gift. State purpose if specified by donor.

4. ON FORM FS-573B, PROVIDE INFORMATION ON THE SCHOOL'S BUDGET FOR THE CURRENT SCHOOL FISCAL YEAR AND ATTACH TO THIS QUESTIONNAIRE.

5. SCHOOLS REQUESTING FINANCIAL ASSISTANCE UNDER THE CONSOLIDATED OVERSEAS SCHOOL PROGRAM SHOULD COMPLETE FORM FS-574 AND SUBMIT IT WITH THIS QUESTIONNAIRE. INDICATE HERE WHETHER FORM FS-574 SUBMITTED:

☐ Yes
☐ No

APPENDIX D

INFORMATION REGARDING PROFESSIONAL STAFF  
MEMBERS OF OVERSEAS SCHOOLS

DEPARTMENT OF STATE  
**INFORMATION REGARDING PROFESSIONAL STAFF MEMBERS  
 OF OVERSEAS SCHOOLS**

(Requested by Section C, Item 2, Form FS-573)

NAME OF SCHOOL

SCHOOL YEAR

Mo./Yr.

To

Mo./Yr.

**INSTRUCTIONS**

On pages 2 and 3 of this form provide the information requested concerning each professional staff member. In column 1 on page 2 identify each professional staff member by the appropriate letter according to the categories listed below. All staff members in the same letter category should be grouped together and listed by alphabetical order of surname. Use additional copies of this form if it is not possible to list all staff members on one form. Submit to the Department in original and two copies with Form FS-573, Overseas School Questionnaire, Part I.

**CATEGORIES OF STAFF**

(Insert appropriate letter in column 1 of page 2 beside name of each professional staff member.)

- a. U.S. citizen recruited specifically for service in the school, and residing in the country for the sole purpose of employment in the school.
- b. U.S. citizen dependent of a U.S. citizen, U.S.-Government employee, including contract employee, residing in the country primarily as a dependent.
- c. U.S. citizen dependent of a U.S. citizen who is not employed by the U.S. Government.
- d. U.S. citizen dependent of a local national.
- e. U.S. citizen dependent of a third-country national.
- f. Other U.S. citizens.
- g. Local national who is a dependent of a U.S. citizen.
- h. Other local national.
- i. Third-country national who is a dependent of a U.S. citizen.
- j. Other third-country national.

NAME OF SCHOOL

POSITION OR TEACHING  
DUTIES

HIGHEST DEGREE EARNED

STATE OF USA OR OT  
JURISDICTION IN WH  
CERTIFIED (if not cert  
write "None")

CATEGORY (See Instructions)

NAME

NATIONALITY

(Indicate grade or subject,  
if part-time administrative  
and part-time teaching, in-  
clude both)

Degree

Year

Institution Which Conferred Degree  
(Include location)State or  
Jurisdiction

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APPENDIX E

OVERSEAS SCHOOLS SUMMARY BUDGET INFORMATION

DEPARTMENT OF STATE  
OVERSEAS SCHOOLS  
SUMMARY BUDGET INFORMATION  
(Requested by Section E, Item 4, Form FS-573)

258

NAME OF SCHOOL

BUDGET FOR CURRENT SCHOOL FISCAL YEAR

Day/Mo./Yr.

To

Day/Mo./Yr.

This form should be completed in accordance with the attached instructions. All entries should be in terms of U.S. dollars, regardless of the currency received and/or expended. The exchange rate used in converting from other currencies to U.S. dollars should be shown as the last item on the form. Submit original and two copies with Form FS-573, Overseas Schools Questionnaire, Part I.

RECEIPTS

ACCOUNT  
NUMBER

U.S. DOLLARS

12. Tuition

12-a. Regular Day school Tuition

12-c. Other Tuition

13. School Bus Service Fees

14. Other Revenues

14-a. Earnings from Permanent Funds and Endowments

14-b. Earnings from Temporary Deposits and Investments

14-c. Net receipts from Revolving Funds or Clearing Accounts

14-c-1. Drawings on School Reserve Funds

14-d. Rent from School Facilities

14-e. Rent from Property other than School Facilities

14-f. Gifts and Bequests in Cash (complete table below)\*

14-f-1. Host Government

14-f-2. Host Country Organizations

14-f-3. Host Country Business Firms

14-f-4. U.S. Foundations

14-f-5. U.S. Business Firms

14-f-6. Individual Gifts

14-f-7. Other (identify)

14-g. Miscellaneous Revenue From Local Sources

14-g-1. Registration Fee

14-g-2. Book Fees

14-g-3. Other Miscellaneous Revenues (identify)

50. Sale of Bonds

60. Loans

70. Sale of School Property and Insurance Adjustments

80. Incoming Transfer Accounts

95. Disbursements of U.S. Government Grants

Total Receipts

Percentage of Total Receipts Received in Local Currency.

SHOW GIFTS AND BEQUESTS IN CASH AND KIND ANTICIPATED DURING CURRENT SCHOOL YEAR, EXCLUDING U.S. GOVERNMENT GRANTS  
GIVE ESTIMATED VALUE OF GOODS OR SERVICES IN KIND.

Source (Give Name)

Value in Terms  
of U.S. Dollars

Describe nature of gift. State purpose if specified by donor.





**INSTRUCTIONS**

**GENERAL:** This summary budget reporting form is based upon an accounting system for United States public school systems. It was developed by the United States Office of Education and published by that Office as Handbook OE-22017, "Financial Accounting for Local and State School Systems," State Educational Records and Report Series: Handbook II Bulletin 1957, No. 4. This Handbook should be used as the basic guide for completing the budget form. Copies of the Handbook were distributed to all schools participating in the Overseas Schools Program in FY 66. Schools which do not have a copy of this Handbook should ask the nearest Foreign Service Post to request one from the Department of State (by OM, Subject: Overseas Schools).

Because of the private nature and other special features of the overseas schools, certain categories of the OE-22017 system have been omitted from this budget form and some categories have been added. These departures from the OE-22017 system are consistent with that system, however, and are noted below.

The overseas schools should use this budget form for reporting budget information to the Department of State. Schools are not requested to convert their existing budget and accounting procedures to this form or to the OE-22017 reporting system, although they may find it advantageous to do so, because the system is a sound and comprehensive one which has been widely adopted in U.S. public schools. It should be noted that because this budget form does not require all of the categories of the OE-22017 system but adheres closely to the number and letter designations of that system to enable schools conveniently to follow it more fully if they desire, certain of the budget categories in this form will have numerical or letter designations which do not follow in sequence. Schools which may wish from time to time and for special purposes to submit more detailed budget data to the Department should prepare such data in accordance with the OE-22017 system to the extent possible.

All data in this form should be reported only in terms of U.S. dollars. Note that the percentage of local currency in total receipts and total expenditures as well as the exchange rate used in converting any local currency received or expended are required entries on the form. The time period covered by the budget should be the school's current fiscal year.

The following comments on the three major sectors of the budget form are intended only to supplement the guidance contained in the OE-22017 Handbook and not to substitute for it. These comments do not, therefore, discuss each budget category but only those which represent a departure from the Handbook.

**RECEIPTS:** A numerical entry, including a zero if there are no receipts to record, should be made for every receipt item. Only monetary receipts should be entered. Goods or services received in kind should be included in the special tabulation at the bottom of the receipts page.

1. OE-22017 Account 11, "Taxation and Appropriations Received" (from local sources) has been excluded from this form because of the private nature of the overseas schools.
2. Account 12 should be used to record only tuition receipts. Account 12-a should be used to record tuition receipts from regular day school students, including boarding students. Account 12-c combines Accounts 12-b and 12-c of the OE-22017 system and should be used to record all other tuition receipts, including those from special programs, such as adult English classes, summer school, etc. Receipts from other fees charged patrons should be recorded in Accounts 13, 14-c (as a net figure), or 14-g, as appropriate.
3. Account 14-c should record the total of net receipts from all separate revolving funds or clearing accounts. That sum, if any, which is derived from any type of school reserve funds available for expenditure by the school board and used to help finance the school during the school year should be shown under 14-c-1, "Drawings on School Reserve Funds." These reserve funds might be in the nature of a "General Reserve Fund" or special funds, such as a "Building Fund" or "Capital Reserve Fund."
4. Account 14-f goes beyond the OE-22017 system to require details on the sources of gifts and bequests in cash. Note that disbursements from U.S. Government grants are not to be recorded in this account, but in Account 95. The tabulation at the bottom of the receipts page is designed to elicit the name of the source and the nature of the gift or bequest in the same manner as item E, 3 on Form FS-573 does for gifts and bequests received during the past school fiscal year.
5. Account 14-g is consistent with the OE-22017 system, but it requests a breakdown of the total into the three categories shown. Account 14-g-3 should record receipts from fees not recorded elsewhere and from other miscellaneous receipts as discussed in OE-22017. Note that special assessments for building funds should be included in account 14-g-3 and specifically identified.
6. OE-22017 Accounts 20, 30 and 40 have been excluded from the budget form.
7. Account 80 combines OE-22017 Accounts 80 and 90 and should be used to record any receipts which may come from other schools.
8. Account 95 is additional to the OE-22017 system. It should be used to record the money to be disbursed by the school during the current school fiscal year from U.S. Government grants which have already been obligated for use by the school. This sum may or may not, of course, coincide with the total of U.S. Government grants available to the school at the beginning of the current fiscal year; only the amount disbursed from the total available should be shown. The amount recorded in Account 95 should equal the amount recorded in Clearing Account 1950-b. (The total of undisbursed U.S. Government grants available at the beginning of the school fiscal year is recorded in Clearing Account 1950-a.)

**EXPENDITURES:** Compared with OE-22017, this budget form is simplified in two important respects as regards expenditures. First, this form does not require distribution of expenditures by program area (e.g. elementary, secondary, etc.). Second, there is no general requirement to pro-rate expenditures among the various accounts. Pro-rating is required only in one situation, namely, where the chief administrative official of the school also engages in classroom instruction, as explained below. However, schools may, if they wish further pro-rate expenditures beyond this requirement. Since full pro-rating of expenditures is not required, a dash (-) may be shown in place of a zero or another figure where there are, in fact, some expenditures for a budget category which have not been pro-rated to it. Only monetary expenditures should be recorded here.

As used in this form, the concept of "Salaries" is that of gross basic salary, including deductions for taxes, retirement, etc., but excluding any compensation paid in the form of allowances, housing, transportation reimbursement, etc. because the school is located outside the U.S. These "Special costs for U.S. Recruited Staff" should be recorded separately, as discussed below.

1. Account 100, "Administration." Unlike the OE-22017 system, which relates expenditures for administration to an entire school district, expenditures for administration in this budget form relate to the costs of general regulation, direction and control of the individual school. The salary of the chief administrative official of the school ("Headmaster," "Director," "Superintendent," etc.) should be wholly included in Account 110 if he engages in no classroom instruction. If the chief administrative official does engage in classroom instruction, his salary should be pro-rated between Account 110 and Account 213 (Teacher Salaries) in proportion to the time spent in each activity. Account 130 should include administrative travel, including travel to recruit staff. Account 140, which is not included in the OE-22017 system, should be used to record the special expenditures for transportation, housing, allowances, etc. required to secure the services of U.S. administrative staff at the school because the school is located outside the U.S. In the case of the chief administrative official, these expenditures should be pro-rated between Accounts 140 and 260 on the same basis as the expenditure for his salary.

Note that this budget form follows the OE-22017 system in providing accounts for recording narrower phases of school administrative activity than general administration. Examples are the accounts for Attendance Services, Health Services, Pupil Transportation, etc. In those cases where an employee's activity is not predominantly in one of these narrower categories, all expenditures for his salary and allowances should be assigned to either the 100 Sector or, if he also engages in classroom instruction, to the 200 Sector, depending upon whether his function is predominantly non-instructional (administrative) or instructional.

2. Account 200, "Instruction." Only a few comments to supplement the discussion in OE-22017 appear necessary. The "Travel Expenses for Instruction" to be included in Account 250 in accordance with OE-22017 should exclude those special expenditures required to secure the instructional services of U.S. citizens at the school because it is located outside the U.S. Such expenditures should be recorded in Account 260. As with Account 140, Account 260 has been added to this budget form to record the special expenditures for transportation, housing, allowances, and the like required to secure the services of U.S. instructional staff because the school is located outside the U.S.

3. Accounts 600 and 700. Note that in accordance with OE-22017, gross expenditures for operation and maintenance of the school as well as of school dormitories and housing for teachers are recorded in these accounts, unless fees or rents are collected from residents. If fees or rents are collected, gross receipts and expenditures for the operation of dormitories and teacher housing are handled through clearing accounts, and only net expenditures are recorded here. (Net receipts, if will be recalled, are recorded in Account 14-c.)

The definitions of expenditures for maintenance and those for capital outlay (Account 1200) contained in OE-22017 make clear the distinctions between these two categories.

4. Account 800. Sub-account 850-a should be used to record all direct taxes paid by the school, such as taxes on real estate or income. Indirect taxes should not be included here. They should be included in other, appropriate expenditure accounts. For example, customs duties paid on imported textbooks should be included as part of the total shown in expenditure account 220, "Textbooks." Any taxes paid by the school on employees' salaries should not be recorded in Account 850-a but should be included with gross basic salaries, as explained above. (Under the OE-22017 system, Clearing Account 1620, "Deductions from Payroll" is used to record taxes withheld by the school to pay employees' taxes.)

5. Accounts 900 and 1000. Note that in accordance with OE-22017, gross expenditures for these programs are recorded in these accounts, unless fees are collected from patrons' use of or participation in the programs. If fees are collected, gross receipts and expenditures are handled through clearing accounts and only net expenditures are recorded here. (Net receipts are recorded in Account 14-c.)

6. Account 1100. In lieu of the sub-categories given in OE-22017 under the Community Services Account, the sub-categories contained in this budget form are designed principally to elicit information concerning school programs to demonstrate U.S. education abroad and otherwise increase international understanding. The sub-categories of Account 1100 in OE-22017 should be used as a guide to identifying those types of expenditures which have not been assigned a special, named category in this form and which should be recorded under the appropriate one of the two "Other" categories of this form: Accounts 1170-f and 1190.

7. Account 1400 should be used to record any expenditures made to other schools.

**CLEARING ACCOUNTS:** In completing this budget form, schools are not required to submit a record of the transactions within the clearing accounts described in the OE-22017 system. Those transactions appropriate for handling through clearing accounts which have an effect upon the budget will, in accordance with the OE-22017 system, appear in the budget in Account 14-c, "Net Receipts from Revolving Funds or Clearing Accounts," or in the appropriate expenditure account.

Schools which decide to adopt the OE-22017 system for their own use should, of course, follow the clearing account numbers given in that system. Schools which follow the OE-22017 system and establish additional clearing accounts in accordance with their needs should reserve account number 1850 for "Operation of Student Dormitories" and account number 1860 for "Operation of Teachers' Housing," since both of these activities are carried on by a number of the overseas schools. Account number 1950 should also be reserved, as explained in the following paragraph.

Only one set of entries is required under the clearing account heading in this budget form. These entries, which are not included in the OE-22017 system, have been assigned Account numbers 1950-a through c. Account 1950-a should record the total balance as of the beginning of the current school fiscal year of unspent U.S. Government funds already obligated for support of the school from current and prior years. Account 1950-b should record the school's planned disbursements of these funds during the current school fiscal year. This entry should be identical with the amount shown in Account 95. Account 1950-c should record the difference between 1950-a and 1950-b.



APPENDIX F

REQUEST FOR ASSISTANCE

DEPARTMENT OF STATE  
OVERSEAS SCHOOLS PROGRAM  
**REQUEST FOR ASSISTANCE**

(Submit original and two copies)

(Please read instructions on page 4 before completing form)

NAME OF FOREIGN SERVICE POST

NAME OF SCHOOL

**REQUEST FOR U.S. GOVERNMENT FISCAL YEAR 19 \_\_\_\_ FUNDS**

TO BE EXPENDED BEGINNING THE SCHOOL FISCAL YEAR EXTENDING FROM \_\_\_\_ TO \_\_\_\_  
Day/Mo./Yr. Day/Mo./Yr.

**A. BACKGROUND AND OBJECTIVES**

(continue on separate sheet of paper if more space is needed and attach to this form)

**B. KEY PROJECTION DATA**

(Express all monetary values in U.S. dollars. Give exchange rate used in converting local currency into U.S dollars: \$1 = \_\_\_\_ )

1. Enrollment of regular students (exclude adult program) \_\_\_\_\_
2. Pupil-teacher ratio \_\_\_\_\_
3. Number of teachers (include rounded sum of fractions representing part-time teachers) \_\_\_\_\_
4. Number of other professional instructional and administrative staff (superintendents, principals, guidance counselors, librarians, business manager. Include rounded sum of fractions as in 3. Avoid double counting as between 3 and 4) \_\_\_\_\_
5. Total professional staff (sum of 3 and 4) \_\_\_\_\_
6. Total professional salaries (gross salaries of personnel included in 5, excluding special costs for U.S.-recruited staff) \_\_\_\_\_
7. Special costs for U.S.-recruited staff (transportation, housing, allowances, etc. for personnel included in line 5) \_\_\_\_\_
8. Expenditures for instructional materials (textbooks, library and audio-visual materials, other teaching supplies) \_\_\_\_\_
9. Expenditures for scholarships \_\_\_\_\_
10. All other expenditures, excluding capital outlay and debt service \_\_\_\_\_
11. Total operating expenditures (sum of lines 6 through 10) \_\_\_\_\_
12. Capital outlay and debt service (budget accounts 1200 and 1300) \_\_\_\_\_
13. TOTAL PROJECTED EXPENDITURES (sum of lines 11 and 12) \_\_\_\_\_
14. Projected annual tuition rate(s) by grade group (show full rates only) \_\_\_\_\_
15. Total projected annual tuition receipts \_\_\_\_\_
16. Total gifts and bequests in cash, excluding U.S. grants (attach separate sheet showing estimated breakdown by name of source, dollar value, and nature of gift or bequest) \_\_\_\_\_
17. Total projected disbursements of active, prior U.S. Government grants \_\_\_\_\_
18. Other receipts \_\_\_\_\_
19. TOTAL PROJECTED RECEIPTS (sum of lines 15 through 18) \_\_\_\_\_
20. PROJECTED BUDGET BALANCE (line 19 MINUS line 13) \_\_\_\_\_

Projected balance of school reserve funds at end  
of fiscal year, excluding undrawn loan balances:

Undrawn U.S. grants \_\_\_\_\_ ; Other \_\_\_\_\_

**C. TYPES AND ESTIMATED COSTS OF NEW ASSISTANCE REQUESTED**

<u>TYPES OF ASSISTANCE</u>	ESTIMATED COSTS	
	(In terms of U.S. dollars)	(Dollar amount which can be expended in local currency)
. Support and development of professional staff		
. Educational materials and equipment		
. Scholarships for host country nationals		
. Construction and equipment (Before assistance for construction can be made available, architectural and engineering plans, specifications and cost estimates must be submitted. These should be submitted at a later date upon request by the Department of State. Note that per 2 FAM 614, assistance in this category will be made available only in special circumstances.)		
5. Special Educational Projects (Including consultants, workshops, activities under the school-to-school and university-to-school projects, community relations projects, special English programs, area studies, etc.)		
<b>TOTAL AMOUNT OF NEW ASSISTANCE REQUESTED</b>		
Amount to be expended in school fiscal year projected in section B.	( )	( )
Amount to be expended in subsequent school fiscal years.	( )	( )

**D. DISCUSSION AND JUSTIFICATION**

CHIEF ADMINISTRATIVE OFFICIAL OF SCHOOL

CHAIRMAN OF THE SCHOOL GOVERNING BOARD

Signature

Date

**E. POST RECOMMENDATION**

### INSTRUCTIONS

Section A through D of this form should normally be prepared by the chief administrative official of the school in consultation with the school board. Section E should be prepared by the Foreign Service Post.

**A. BACKGROUND AND OBJECTIVES:** This section should provide:

- (1) A summary statement describing the extent to which the school now meets the dual objectives of the overseas schools program as stated in 2 FAM 612 of (a) providing educational facilities for U.S. Government dependents overseas, and (b) demonstrating U.S. education abroad and otherwise increasing mutual understanding.
- (2) A brief general statement of the school's long-range objectives and development plans and the measures being taken to realize the plans, including efforts to obtain material support from sources other than the U.S. Government.

**B. KEY PROJECTION DATA:** The purpose of this section is to secure quantitative projections of key educational and budget data for the school fiscal year beginning with which the requested U.S. Government assistance will be expended. The data should reflect the development and improvements which are feasible and necessary for the school to undertake in that school fiscal year in order to move toward the objectives stated in Section A. Much of the budget data requested in this section is conceptually identical with that in Form FS-573B, but it relates to the year following that covered by Form FS-573B.

**C. TYPES AND ESTIMATED COST OF NEW ASSISTANCE REQUESTED:** This section should be used to summarize the types and estimated costs in dollars of new assistance requested by the school according to the categories shown, including the dollar equivalent of such costs which can be expended in local currency. Note that under the overseas schools program every effort is made to make maximum use of United States-owned foreign currencies.

Note that the total amount of new assistance requested may be larger than any projected budget shortfall which might be shown in Line 20 of Section B. One cause of this may be the fact that the new assistance requested may be planned for expenditure over more than one school fiscal year. Schools should not hesitate to request assistance to be expended over more than one year if such programming appears most effective.

**D. DISCUSSION AND JUSTIFICATION:** Describe the essential details (number, quantities, types, duration, etc.) of the projects to be financed under each of the categories of assistance listed in Section D and state how each item of requested assistance fits into the school's development plans and advances the objectives of the overseas schools program. This discussion should be organized in the sequence of the categories shown in Section D. Following the discussion of each item of requested assistance, designate the ranking it should be accorded in terms of the school's development program by designating it "Priority 1, 2, etc." Brief reference should be made to any previous grants made for the same purpose and to future grants which may be requested for the same purpose.

The discussion should conclude with a brief statement of the nature and purpose of the balance of school reserve funds, excluding undrawn U.S. grants, shown as the last item of Section B. It is understood that sound administrative practice requires independent schools to establish reserve funds adequate to maintain orderly operations and to meet unforeseen contingencies.

The chief administrative official of the school and the chairman of the school's governing board should sign the request at the places indicated.

**E. POST RECOMMENDATION:** Pursuant to 2 FAM 615 and 622, the principal officer or the officer responsible for coordinating school activities at the Foreign Service Post should ensure that the request for assistance is carefully reviewed in light of the policies and criteria for granting assistance set forth in 2 FAM 600 and is justifiable in terms of these policies and criteria. The appropriate officer should prepare and sign the recommendation at the place indicated. No request for assistance will be considered unless Section F is properly completed.

APPENDIX G

# Foreign Affairs Manual Circular

## JOINT STATE, AID, CIRCULAR

SUBJECT: Overseas Schools Policy  
Committee for Elementary  
and Secondary School  
Activities and Establish-  
ment of the Overseas  
Schools Staff (A/OS)

No. 237

September 24, 1964

### 1. Overseas Schools Policy Committee

#### a. Objectives

The Overseas Schools Policy Committee, established pursuant to FAMC No. 161, dated December 30, 1963, is responsible for achieving the mutual objectives of providing adequately for the educational needs of United States Government sponsored families serving overseas, and of assisting American-sponsored schools abroad which demonstrate American methods and practices in education and contribute to friendly relations between the United States and other countries.

#### b. Membership

The Committee will consist of the Assistant Secretary for Administration (Chairman), the Assistant Secretary for Educational and Cultural Affairs, and the Assistant Administrator for Administration, AID.

#### c. Responsibilities and Functions

The Committee will:

- (1) Subject to applicable legislative authorizations, prescribe general policy for overseas

elementary and secondary school activities administered by the Department, and coordinate such activities, including educational allowances as appropriate.

- (2) Give policy guidance and direction to the development of a comprehensive overseas school program that (a) will meet current and long-range educational needs of dependents of overseas United States Government employees as well as those of non-Government personnel carrying out activities under the AID Act, and (b) will serve to increase mutual understanding between the people of the United States and the people of other countries.
- (3) Coordinate and approve long-range and annual financial plans for overseas schools activities to be carried out by A, CU, and AID.
- (4) Approve annual programs, and modifications of such programs, to be carried out by A, CU and AID which will ensure a coordinated approach to meeting the most urgent needs of the schools and best promoting the interests of the United States.

d. Executive Secretary

The Committee will be assisted by an Executive Secretary who will report to the Chairman of the Committee. In collaboration with designated liaison officers of A, CU, and AID, the Executive Secretary will:

- (1) Schedule meetings of the Committee at least twice a year.
- (2) Prepare the agenda for Committee meetings, including preparing policy papers on issues brought before the Committee for resolution.
- (3) Prepares minutes reporting Committee meetings for distribution to Committee members and designated liaison Officers in A, CU, and AID.

2. Overseas Schools Staff

a. Objectives

There is hereby established the Overseas Schools Staff, under the broad policy direction of the

Overseas Schools Policy Committee, to be located in the office of the Assistant Secretary for Administration. The Overseas Schools Staff (A/OS), is responsible for planning and administering the overseas elementary and secondary schools activities of A, CU, and AID to ensure central guidance and coordination of schools policies and programs. This does not include the schools program authorized under Section 214 of the Foreign Assistance Act. The Overseas Schools Staff assists the Overseas Schools Policy Committee in recommending policy guidelines, criteria, and objectives for administering the schools assistance activities of A, CU, and AID. The Staff also works closely and coordinates its activities with the central and regional offices and bureaus of State and AID, and with CU in program planning and implementation.

b. Transfer of Functions

The personnel, functions, and records with respect to school assistance activities previously administered by the American Sponsored Schools Branch of the Bureau of Educational and Cultural Affairs and the Dependent Education Branch, Employee-Management Relations Division, Office of Personnel Administration, Agency for International Development, will be located in the Overseas Schools Staff of the Bureau of Administration.

c. Responsibilities and Functions

The responsibilities of the Overseas Schools Staff, in consultation and coordination with appropriate liaison offices and bureaus of State and AID, are as follows:

- (1) Plans and implements the overseas schools assistance activities of the Department of State (i.e., the Bureau of Educational and Cultural Affairs and the Bureau of Administration) and the dependent education program of the Agency for International Development to assure coordination in schools policies and programs.
- (2) Develops and recommends to the Overseas Schools Policy Committee, policies, criteria and objectives, subject to applicable legislation and regulations, for assisting in the establishment and operation of American schools overseas.



- (3) Develops annual and long-range plans for schools assistance, including the recommendations for regional and functional priorities, for presentation to the Overseas Schools Policy Committee.
- (4) Prepares an annual consolidated overseas schools program, subject to the availability of funds and the approval of the Overseas Schools Policy Committee.
- (5) Assures effective implementation of schools assistance programs by working closely with overseas posts and schools, and professional education organizations, etc., in the United States.
- (6) Plans, coordinates and conducts field surveys and studies on all aspects of the overseas school program.
- (7) Consults with, and obtains the assistance of the Foreign Buildings Operations in the planning and construction of overseas schools and related structures.
- (8) Prescribes and administers a system for reporting program progress to the Overseas Schools Policy Committee and interested offices and bureaus of State and AID.
- (9) Consults with the Bureau of the Budget and other Federal agencies to ensure coordination of overseas school activities.
- (10) Develops and recommends special programs of school assistance as required.
- (11) Provides information to Americans assigned overseas and other interested parties concerning American-sponsored elementary and secondary school facilities abroad.

CANCELLATION

Foreign Affairs Manual Circular No.  
161 dated December 30, 1963 is  
hereby canceled.

(A/OS)

(NOTE: Number of last circular issued: FAMC No. 236.)

APPENDIX H

# Foreign Affairs Manual Circular

## UNIFORM STATE/AID ISSUANCE

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SUBJECT: Overseas Schools  
Advisory Council: State-  
ment of Objectives

State FAMC No. 476  
AID Man. Circ. 583.1

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April 13, 1967

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### 1. Purpose

The Overseas Schools Advisory Council was established effective March 1, 1967, by the Department of State to seek the advice and capabilities of a selected group of American leaders from the business, foundation and educational communities, with respect to the American-sponsored elementary and secondary schools abroad that are assisted by the Department of State. Matters of policy guidance and financial support are the main concerns of the Council.

The Department of State has a twofold purpose in creating the Council:

- a. To help the overseas schools become showcases for excellence in education.
- b. To help make overseas service attractive to American citizens, both in the business community and in Government.

### 2. Membership

The membership of the Council is composed of American business and professional leaders whose experience and interests enable them to help achieve the above purposes.

### 3. Functions

The responsibilities of the Council are:

- a. To coordinate the efforts of American business firms and foundations with those of the Department of State toward providing needed educational facilities for American citizens abroad.
- b. To facilitate obtaining maximum resources (funds, buildings, equipment, and supplies) from private and public agencies to assist those American-sponsored independent community schools overseas which are assisted by the Department of State.
- c. To advise and consult with the Department of State on the relations between the United States Government and private agencies who are concerned with the American-sponsored independent community elementary and secondary schools overseas.

### 4. Meetings

The Council will meet annually or more often, when necessary, at the call of the Council's Chairman.

### 5. Staff Services

The Director of the Office of Overseas Schools, Department of State, will serve as Executive Secretary of the Council.

### 6. AID Instructions

AID-TL 5:166, file in front of M.O. 583.1.

### 7. Manual Codification

This circular will be codified in the Foreign Affairs Manual within six months of date of issue and the circular will be canceled concurrently. Meanwhile, cross-reference it to 2 FAM 600.

(O/OS)

(NOTE: Number of last circular issued: FAMC No. 475.)

APPENDIX I

LIST OF SCHOOL-TO-SCHOOL PARTNERS

AS OF 2/1/70

# APPENDIX I

## LIST OF SCHOOL-TO-SCHOOL PARTNERS

AS OF 2/1/70

<u>U.S.</u>	<u>Abroad</u>
	<u>Europe</u>
Baltimore County Schools, Towson, Md.	Vienna (American Inter- national School)
Charlottesville, Va. Public Schools	Frankfurt (International School)
Bellevue, Wash. Public Schools	Munich (International School)
Winchester, Mass. Public Schools	Rome (Overseas School)
Bangor, Maine Public Schools	Trieste (International School)
Wheatland-Chili High School, Scottsville, N.Y.	Copenhagen (International School)
St. Paul, Minn. Public Schools	Stockholm (Anglo-American School)
McGuffey El. Lab. School, Miami University, Ohio	Prague (International School)
Lexington, Mass. Public Schools	Warsaw (American School)
Pittsford, N.Y. Central School District	Belgrade (International School)
Cleveland Heights-Univ. Heights, Ohio School District	London (American School)

San Diego, Calif. Unified  
School District

Madrid (American School)

Africa

Northfield and Mount Hermon  
Schools, Mass.

Accra (Lincoln Community  
School)

Hastings-on-Hudson, N.Y.  
Public Schools

Rabat (American School)

Tangier (American School)

Glenn Falls, N.Y. School  
District

Tunis (American Cooperative  
School)

Cupertino, Calif. Union  
School District

Lusaka (International  
School)

Kinshasa (American School)

Topeka, Kansas School  
District

Addis Ababa (American Com-  
munity School)

Near East and South Asia

Tenafly, N.J. Public Schools

Athens (American Community  
Schools)

La Mesa-Spring Valley,  
School District

Beirut (American Community  
School)

Austin, Texas Independent  
School

Cairo (American College)

Cheyenne, Wyoming Public  
Schools

Kabul (American Inter-  
national School)

Montebello, Calif. Unified  
School District

Kathmandu (Lincoln School)

Poway, Calif. Unified  
School District

Lahore (American School)

School District of  
Pontiac, Mich.

Karachi (American Society  
School)

Bucks County, Pa. Public  
Schools

New Delhi (American Inter-  
national School)

Tucson, Ariz. Public  
Schools

Tehran (American School)



Wayne Township, Ind.  
Metropolitan School  
District

Edina, Minn. Public  
Schools

Prince Georges County, Md.  
Public Schools

San Diego, Calif. Unified  
School District

Brookline, Mass. Public  
Schools

Portland, Ore. Public  
Schools

Montgomery County, Md.  
Public Schools

Richmond, Calif. Unified  
School District

Cherry Creek, Col. School  
District

Tacoma, Wash. School  
District

Morrisville, Pa. School  
District

Little Rock, Ark. Public  
Schools

Fremont Union High School  
District (Sunnyvale,  
Calif.)

Corpus Christi, Texas  
Independent School  
District

Kuwait (American School)

Thessaloniki (Pinewood  
Schools)

Dacca (American Society  
School)

Jidda (Parents' Cooperative  
School)

#### East Asia

Nagoya (International  
School)

Tokyo (American School in  
Japan)

Singapore (American School)

Taipei (American School)

Bangkok (International  
Schools)

Vientiane (American School)

#### Latin America

Cochabamba (Cooperative  
School)

La Paz (American Cooperative  
School)

Santa Cruz (Cooperative  
School)

Recife (American School)

Rio de Janeiro (American  
School)



Board of Coop. Educ. Services (Port Chester, N.Y.)	Sao Paulo (American Ele- mentary and High School)
Memphis, Tenn. City Schools	Guatemala (American School)
Knoxville, Tenn. City Schools	Guadalajara (American School)
Flint, Mich. Public Schools	Mexico City (American School Foundation)
Webster Groves, Mo. School District	Lima (American School)
Millcreek Schools (Erie, Pa.)	Santo Domingo (Carol Morgan School)
Hingham, Mass. Public Schools	Managua (American-Nicaraguan School)
Huntsville, Ala. Public Schools	Barranquilla (Karl C. Parrish School)
Newton, Mass. Public Schools	Bogota (Colegio Neuva Granada)
Canton, Ohio Public Schools	Cali (Colegio Bolivar)
Mesa, Ariz. Public Schools	Cartagena (George Washington School)
Clark County School Dis- trict (Las Vegas, Nev.)	Medellin (Columbus School)
St. Bernard Board of Edu- cation (Chalmette, La.)	Guayaquil (American School)
Boston, Mass. Public Schools	San Salvador (American School)
Eugene, Ore. Public Schools	Santiago (International School)
Lakewood, Ohio Public Schools	Quito (American School)



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