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FROM : Richard J. Greene, Chief, Education Sector

DUPLICATE

SUBJECT: Review of Education Sector Loan 525-L-036

RG

An evaluative review of Loan 525-L-036 was conducted jointly by more than thirty Ministry of Education and USAID/P officials on May 5, 1976. The Minister of Education, Dr. Aristides Royo, presided over the review throughout a well-planned three-hour session. The meeting was conducted in a manner that evoked extensive and open participation by key personnel from both the MOE and USAID/Panama.

Written reports had been prepared within the MOE by the technical directors and operational project chiefs. These reports served as a basis for verbal reports in the review session and subsequent questions on and discussion of each major loan project activity. A query-dialogue-conclusion pattern of discussions evolved, and the result was a series of critical analyses of key administrative and technical aspects of the loan. The most extensive presentations were made by the National Directors of Curriculum and Teacher Training. All other aspects of the loan operations were covered, but in less comprehensive fashion.

Throughout the review the Minister showed a positive attitude and voiced a desire for frank, honest and open dialogue that might lead to alternative solutions where problems were encountered. Both Mr. Tragen, the USAID Director, and the Minister repeatedly recognized that problems are inevitable in an endeavor as complex as a sector loan, and both pointed out the importance of establishing and sustaining procedures that are conducive to the emergence of alternative solutions.

The Minister stated that the loan evaluation was an attempt to reflect upon the implementation of loan 036, and to derive lessons that will help us in completing activity under this loan and improving the implementation of future projects. "We know we have made some errors in the implementation of this loan", he said, "and that there have been a series of problems, most of which we have been able to solve, thanks to the understanding between our staff and the USAID staff...". Difficulties, he admitted, have been caused not only by lack of human resources, but by weaknesses in the MOE structure and administration. Sometimes, he said, "a new structure or improvement of a structure, or organism, committee or subcommittee, which can take responsibility for airing certain difficulties" is necessary.



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He expressed a hope that alternatives and concrete proposals with respect to problems would come out of the evaluation.

The reports on loan sponsored activity in Curriculum and Educational Technology, Teacher Training and In-Service Education were positive, comprehensive and well documented.

A. Curriculum

Prof. Josefa Maria Prado, National Curriculum Director, reported considerable progress. The curriculum programs for grades I, III and VII of General Basic Education are now going through initial adjustments, and materials for grades II, IV and VIII are being distributed on an experimental basis for trial and subsequent adjustment. Programs for grades V and VI are in initial stages of development. Prof. Prado reported that both foreign and local technical assistance has been used in curriculum materials development, but that the actual writing is being done by about forty Panamanian primary school personnel, with selected high school teachers working in subjects where the knowledge of the primary teachers is not of sufficient depth. She emphasized that the purpose of the new materials is to bring about a transformation of the system, not merely to change the books; e.g., in science, the focus is upon moving from a subject matter orientation to an experimentation-centered process-oriented science curriculum that avoids rote memorization. She mentioned that in the mathematics curriculum extensive cooperation is taking place with both the University of Panama and the University of Santa Maria La Antigua.

Evaluation of the new materials received extensive treatment which began when the USAID Director asked Prof. Prado how the Ministry is going to analyze the impact, to see the real effect of the new texts and guides. Prof. Prado stated that there will be comprehensive evaluation at the national, provincial and local teacher-community levels and that evaluation will take place periodically, throughout the year, probably quarterly, and not just at the end of the year. She confirmed emphatically Mr. Tragen's assumption that the Directorate of Curriculum was ready to make the changes indicated as a result of the evaluation.

Prof. Prado emphasized the importance of having primary school teachers, with their experience of the actual conditions in the schools, participate in the creation of curriculum materials. She also emphasized the importance of "horizontal" integration between subject matter areas to avoid unnecessary repetition as well as provide reinforcement. She stressed the importance of a mixture of empiricism and technical expertise. She added that the writers received training in curriculum development, learning concepts and theory, textbook writing, etc., but the most important thing, she said, was their experience.

Both the Minister and the Vice-Minister, Dr. Diogenes Cedeño Cenci, participated with Mr. Tragen in following through on the textbook evaluation. In response to another question by Mr. Tragen concerning how the impact of changes in the present system on the student would be analyzed, Prof. de Calvit, Director of Teacher Training, cited the reduced level of failures as an indicator. Prof. Borrero, Director of Planning, said a series of indicators would be required citing in particular the retention index (i.e. the percentage of entering students who remain in school). Prof. Prado spoke of indices which evaluate the work students, teachers and administrators are doing. A problem with the failure and retention rates is that they may be affected by factors other than curriculum, such as nutrition, economic conditions and reduced standards. Thus as Prof. Borrero indicated, further study of the subject is needed and a variety of measures, including perhaps student, teacher and parent opinions.

B. Printing and Distribution of Texts

Both the Minister and Miss Abood, the National Director of Administration and Finance, expressed the Ministry's intention to examine the costs and efficiency of the MOE printing center compared to other alternatives, including commercial printing, and the Ministry's readiness to use the least expensive system.

Dr. Holz of AID asked if textbooks were going to be distributed free. Prof. de Soler of the Directorate of Planning replied that the Constitution establishes that the students be given the necessary "tools and implements" but that the country could not afford to do this all at once, that the Directorate of Planning would have to study demand and costs, and program delivery according to availability of resources over the next "5, 10, 15 years".

C. Teacher Training

Prof. Silvia de Calvit, National Director of Teacher Training and In-Service Education, spoke about the loan sponsored in-service training. "It is very hard," "it is very big", she stated in relating the impressive accomplishment of having already run in-service training courses for over 11,000 teachers. The goal is to reach all teachers in the general basic education system, i.e. all teachers grades 1-9; first, with minimum essential orientation with respect to the changes in curriculum and subsequently (via Education Sector Loan II) with a systematic follow-through in whatever depth necessary to bring about an actual transformation of what goes on in the schools. The need for teacher training, Prof. de Calvit said, does not end with graduation (from normal school or university). The graduates do not have all the tools they need to work for the 28 years until they are eligible for retirement. Continuous in-service training, support, evaluation and follow-up are needed. The teachers must be asked in the evaluation process what they're having difficulties with, what more they need. Teacher training must be subject to rigorous evaluation, including evaluation by those who receive it and self-evaluation by the trainers. A schedule of feedback

and evaluation sessions, which will go on continuously, has been established to support the true transformation of the system of which Prof. Prado spoke.

Prof. de Calvit stated that the proposed Teacher Training Center in Santiago is going to become a reality, and that the MOE and the University of Panama Faculty of Education are working together on the pre-service training program for teachers of the last cycle of General Basic Education, i.e., for teachers of grades 7, 8 and 9.

Prof. de Calvit spoke of difficulties in the areas of transportation and small purchases. The procedures for use of loan funds, she said, are lengthy and inflexible. Country stores where purchases often have to be made for highly decentralized training such as that which the Ministry is trying to conduct (in order to build up local training resources, among other reasons) do not always provide appropriate receipts. The brunt of Prof. Calvit's criticism was that rigorous accounting procedures for petty cash expenditures seemed unnecessary and excessively burdensome.

D. The Operational Funding Problem

The Minister asked what was happening with regard to the transportation problem. Lic. Abood replied that vehicles are being purchased. Mr. Greene of AID asked about the problem of fuel, maintenance and repairs for the vehicles, per diems for Ministry personnel who need to get out to the field and other operational costs. Lic. Abood indicated that this remained a serious problem, aggravated by the additional burdens of the AID and BID loan projects. "Within the rigidity of the loan" she said "we do not find the flexibility to achieve the necessary support". She added that the Ministry's budget for this year did not offer hope for a solution to this problem, not to mention the problem of materials and supplies.

The Minister asked how AID thought the problem might be solved. Mr. Tragen replied that we need a joint system of planning, a working group with three Ministry representatives and three AID representatives which can make quarterly implementation plans dealing with administrative as well as other needs and thus identify problems in advance. The AID Controller, Mr. Naylor, and Lic. Abood have the basic problem and must seek the means which will enable the team to work and anticipate the problems arising from our respective regulations.

E. Loan 525-V-043 Planning

Mr. Tragen mentioned the importance of the working committee again in the context of financial plans for the first quarter under the new loan. He stressed that these plans should be prepared before July 1 in order to avoid further delays in getting the loan underway and as disbursements under 036 must be completed before June 30.

F. Administration of Construction and Maintenance, and Planning

The Minister initiated a frank discussion of the desirability of merging the building design, construction supervision, inspection, maintenance and repair functions currently divided between the Directorates of Administration and Planning. Different opinions were expressed by various Ministry officials. The discussion terminated with the Minister's observations that the question would have to be resolved in the Consultative Council.

Mr. Tragen emphasized the importance of construction supervision and of continuing maintenance by the administrators, students and community (as well as the Ministry). The Minister agreed.

Mr. Greene mentioned the human resources in the Ministry which might be brought to bear on construction planning, maintenance and other problems, such as the architects in the Directorate of Planning, who seemed to have done very good work in developing community support for self-help construction and the group, also in the Directorate of Planning, which was working on the quarterly financial plans for the new loan. Mr. Greene expressed the opinion that there were good possibilities for more effective use of human resources such as these, through coordination of the sort that had been discussed.

Dr. Ordoñez, the guidance counselling advisor, expressed the opinion that maintenance of schools, as well as preservation of books and maintenance of furniture and even of playing fields, could best be attained by educating and motivating the community, including the teachers, school administrators and students. Among motivational possibilities he mentioned the award of certificates and prizes for the best maintained schools. He argued that structural maintenance alone, through a centralized mechanism, would tend merely to reinforce paternalism and dependency and encourage irresponsibility.

The Vice-Minister noted the need to coordinate also with other agencies engaged in school construction such as DIGEDECOP. Ing. Sanchez of AID revealed that school construction with community help cost only about B/.2,500-B/.4,000 per classroom while Ministry construction cost approximately B/.4,000-B/.7,000 and contract construction B/.7,000-B/.12,000.

G. Termination of Loan 525-L-036

Mr. Tragen mentioned that only seven weeks (as of the date of the review, 5 May) remained for presentation of bills under the terminating loan and that it was thus necessary to expedite the process of presentation. Lic. Abood replied that her office was aware of this need and working to assure full utilization of the funds. She said the last reimbursement requests would be sent by June 15 at the latest.

H. Purchasing and Distribution

Lic. Beatriz de Gonzalez, Chief of the Supply and Purchasing Department, indicated the need for advance planning by the offices needing materials and equipment, precise specifications, and more flexible source-origin requirements on the part of AID.

Mr. Tragen mentioned the importance of quarterly plans in helping us anticipate the need for source-origin waivers in emergency cases. He also mentioned the need for warehousing facilities, particularly for excess property donations. The Minister replied that arrangements would be made for warehousing and also for more vehicles to transport these materials to the schools.

Closing Remarks

Mr. Tragen expressed his pleasure at the good relations existing between the Ministry and AID and mentioned two lessons of the evaluation: (1) the importance of the interrelation between planning and execution, and (2) the importance of a joint working committee. He concluded that the loan is not something apart from the Ministry's policy but very much a part of it and that we must continue working together in the best form possible.

The Minister concluded that this had been an instructive session, that we should have similar sessions periodically in the future and that he hoped AID would keep the Ministry informed of problems. We must, he said, avoid misunderstanding. We still have many problems and concerns but there exists the possibility of innovations which will permit us to open new paths.

EDU:CBoyd/RGreene:bsz :

Distribution:

I. Tragen	V. Jaen
G. Rublee	J. Salerno
C. Boyd	J. Sanchez :
N. Holz :	M. Zak