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IIBE Semi Annual Report

September 1986 - March 1987

IEES

Improving the Efficiency of Educational Systems

Florida State University
Howard University
Institute for International Research
State University of New York at Albany

Agency for International Development
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I.I.B.E. SEMI-ANNUAL REPORT

September 1986 - March 1987

1. INTRODUCTION

This is the first progress report on the implementation of the Incentives for Improving Basic Education (IIBE) Project in Haiti. It covers the period from the signing of the project contract on August 29, 1986, through the end of March 1987. For a number of political and institutional reasons (discussed in section 4.0), the USAID Mission and the Project Administrative Council (PAC) felt it important that the project get underway by the beginning of the 1986-1987 school year, though recruitment of personnel and establishment of project offices could not be entirely completed by that date.

The requirements of starting up a project of the complexity of IIBE without permanent technical staff (all of whom were recruited in the course of the first seven months) did not leave time for establishing a full report at the end of the first trimester. Permission was therefore requested of the AID Mission and the Project Administrative Council to combine the first two trimestrial reports into a single "semi-annual report" covering the September to March period. This was granted with the proviso that subsequent reporting be conducted on a trimestrial basis, as stipulated in the contract.

The IIBE Project has two fundamental objectives: (a) to improve quality of instruction and efficiency of school administration in a significant number of private primary schools serving rural and poor urban sectors of the Haitian population; and (b) assist the principal segments of private education in Haiti to organize themselves in such a manner as to assure the long-term continuity of the educational improvement effort. Four principal project components are designed to ensure accomplishment of these objectives:

- Support for a significant number of existing private primary schools in rural and economically depressed urban areas.
- Research and development to identify more cost-effective ways of delivering primary education to the target populations.
- Assistance for the establishment and initial operations of private education associations.

- Reinforcement of the capacity of the Ministry of Education to exercise certain critical regulatory and support functions with respect to private primary education.

By amendment number 8 to its contract no. DPE-5823-C-00-40143-00 with AID, the IEES consortium was given responsibility for implementation of the first three components of the IIBE Project over the first year of project life (August 29, 1986 to September 30, 1987). Implementation of the fourth component was provided for by a project grant agreement between AID and the Government of Haiti signed on August 29, 1986 and covering the entire six-year life of the project.

The organization of this report parallels the overall design of the IIBE Project specified above. The following section is devoted to an analysis of progress made in implementation of the three project components for which the consortium is responsible: school support, research and development, and institutional development. The third section deals with progress in the establishment of the administrative and management systems necessary to ensure effective implementation of these components. The fourth section highlights constraints and problems encountered in the course of project implementation, and the solutions adopted or proposed for resolving them. The fifth and final section presents a workplan of projected activities for the upcoming trimester and discusses principal project implementation landmarks anticipated for that period.

2. PROGRESS IN THE IMPLEMENTATION OF PRINCIPAL PROJECT COMPONENTS

2.1. School support

Project design called for providing support to a first pilot cohort of approximately 25 schools in the course of the 1986-1987 school year, about half of them in the school district of Hinche in the central plateau and the rest in the school district of Cavaillon in the Southern Department. Twenty-five was deemed an approximate number, because school support funds in the project budget are actually calibrated in terms of numbers of students, rather than numbers of schools. "Twenty-five" schools in fact means twenty-five "average" schools enrolling two hundred students each, or 5000 students in all. Any number of eligible schools having a total enrollment of up to 5000 would have been within budgetary limitations.

Candidates schools were identified in July 1986 by Protestant and Catholic members of the Project Administrative Council who visited the two geographic regions in question and talked with school directors and local education organizations. Twenty-five schools with a total official enrollment of 4580 were initially chosen. Twenty-four of these sent personnel to the teacher training sessions held in Port-au-Prince in August and twenty-three subsequently received other forms of support and participated in this year's project activities. The breakdown of participating schools by region, religious affiliation and size is presented in Table 1.

Two schools had to be dropped from the initial cohort, one because it already had another major source of outside support, and the second because its teachers had not completed primary school themselves. One did not send its teachers to the August training session, and these staff had to be trained in the field by project personnel.

Project methodology calls for the establishment of a performance contract with each participating school. Project staff is supposed to engage school personnel and related community groups in diagnosing the principal impediments to better educational quality at the local level, then designing a contract in which the school specifies the forms of support that it most urgently needs (within the limits of a budget set at $25 per student per year) and the performance objectives that this assistance should enable it to achieve. Twelve possible forms of support are specified in the project paper, including training for teachers and school directors (an obligatory item on the assistance "menu"), performance incentive grants for teachers who apply the results of their training diligently, various types of school textbooks, equipment and supplies, assistance with school facilities renovation, school feeding programs, preprimary programming, investment funds for income-generating activities and allowances for administrative overhead.

In theory, diagnosis of school needs and performance contract negotiation should begin as soon as participating schools are identified and be completed, at the latest, during the teacher training sessions in the summer preceding the opening of classes. In fact, at the time when schools of the first cohort were identified and teachers were trained, the project contract had not yet been signed and there was no full-time project staff. Members of the Project Administrative Council carried out these tasks on a voluntary basis -- and

TABLE 1:
Background Data on First Cohort Schools

Region	School	Religious affiliation	Enrollmt 3/87	Number classes	Number clsrms	Number tchrs	Stdt/tchr ratio
Cavaillon	Notre Dame de la Mer	Catholic	246	7	4	6	41.0
	St. Michel	Catholic	115	8	3	3	38.3
	Presbytérale Berrette	Catholic	73	6	6	2	36.5
	Presbytérale Pliché	Catholic	138	8	1	6	23.0
	Presbytérale Immaculée Conception	Catholic	247	8	6	8	30.9
	Presbytérale Ti Francois	Catholic	239	8	1	5	47.8
	Presbytérale Gauthier	Catholic	368	9	5	8	46.0
	Ste. Thérèse de Bury	Catholic	50	2	1	1	50.0
	Evangélique Béthanie	Protestant	188	9	1	7	26.9
	Evangélique Baptiste	Protestant	213	8	3	4	53.3
	Méthodiste St. Georges	Protestant	116	5	3	3	38.7
	Méthodiste Dory	Protestant	293	8	2	8	36.6
Hinche	Jezi Ayisen de Hinche	Catholic	61	6	1	3	20.3
	Manman Bondyé	Catholic	230	9	9	9	25.6
	Sainte Thérèse	Catholic	307	8	9	9	34.1
	Jezi Ayisen d'Abriot	Catholic	140	4	1	3	46.7
	St. Jean Bosco	Catholic	320	7	9	9	35.6
	Jezi Ayisen de Bentourib	Catholic	206	6	1	3	68.7
	Méth. Wesleyenne/Thomonde	Protestant	224	4	8	9	24.9
	Méth. Wesleyenne/Bernaco	Protestant	33	4	2	2	16.5
	Méth. Wesl/Tierra Muscady	Protestant	15	2	1	1	15.0
	Méth. Wesleynne/Salmadère	Protestant	91	4	NA	3	30.3
	Méth. Wesleyenne/Casse	Protestant	281	7	8	8	35.1
	OVERALL TOTAL		4194	147	85	120	--
	Overall Averages		182	6	4	5	35.7
	Catholic Subtotal		2740	96	57	75	--
	Catholic Averages		196	7	4	5	38.9
	Protestant Subtotal		1454	51	28	45	--
	Protestant Averages		162	6	3	5	30.8

carried them out very well -- in order that the project might get under way in the fall of 1986, but they did not have the time to go through all the preliminaries specified in the methodology. Full-time consultants were engaged during the training sessions and again in October 1986 to assist with project start-up, but permanent staff did not start to come on board until the month of November and recruitment of a nearly full complement to staff for the Technical Services Center and the two Sectoral Services Centers was not accomplished until March 1987. As a consequence, an abbreviated form of the methodology was followed in this pilot year. School needs were discussed and inventoried during the teacher training sessions, and agreements were reached about the reciprocal responsibilities of local school personnel and central project staff. However, formal performance contracts were not established.

For the same staff shortage reasons, participating schools only received a portion of the desired support in the first two trimesters of the 1986-1987 school year, essentially the training, textbook and school supplies inputs along with the performance incentive grants. The type and dollar value of resources provided to schools is summarized in Table 2. We did not have the manpower necessary to meet the full gamut of school needs, particularly with respect to those resource inputs (school renovation, investment funds, institution of school feeding programs) that require considerable advance preparation at the local level by project staff. Teacher training was successfully performed, thanks to the considerable assistance (mostly volunteer) of members of the Project Administrative Council, but the additional training elements required by school directors were not very thoroughly worked out.

School furniture needs were inventoried and orders placed, but several logistic problems that will hopefully be resolved for the 1987-88 school year slowed delivery. First, as a general policy option, the Project Administrative Council decided that school resource materials that can be produced in Haiti should be ordered from Haitian suppliers. In the case of school furniture, for example, this enabled us to do something of value for Haitian education at both ends of the order and so to double the beneficial impact of the funds. Orders were placed with the Ecole Nationale des Arts et Metiers (ENAM), a vocational-technical school run by the Salesian Fathers in a poor neighborhood of Port-au-Prince that has the capacity to produce very good desks, storage cabinets and other items of school equipment at price-quality ratio levels entirely

TABLE 2:
School Support Expenditures

Type of support	Planned expenditures 1986-1987	Actual expenditures as of 3/87
Inservice training*	$62,500	$0
Perform. Incentive Grants	$37,500	$16,050
Textbooks	$37,500	$21,500
Instructional material	$6,250	$8,473
School supplies	$6,250	
School furniture	$60,000	$38,120
Preprimary programs	$0	$0
School feeding program	$0	$0
Building renovations	$0	$0
Income-generating activit	$0	$0
Administrative overhead	$10,000	$0
TOTAL	$220,000	$84,143

* This year's training costs were covered by Missi funds prior to signature of the IEES contract.

competitive with import. The shortcoming was that, for the reasons of lack of personnel mentioned above, we were not able to place these orders until after the opening of classes in October. Moreover, ENAM was not accustomed to producing material in the quantity we required as rapidly as we would have liked, and as a consequence could not begin delivering the furniture until April of 1987, more that two-thirds of the way through the school year.

A second complicating factor was the competitive bidding procedure required by Florida State University (by virtue of State of Florida regulations) for any order over $3000 in value. Potential Haitian suppliers were not accustomed to this practice, and further delays were introduced in trying to elicit comparable proposals.

Monitoring and inspection support for participating schools was likewise provided in patchwork fashion over the first two trimesters for the same reasons. One temporary regional inspector working half-time was recruited in each of the two pilot zones in the month of November to visit project schools. In addition, staff from the Port-au-Prince office made four different circuits of field sites during the same period, visiting each school at least once and most twice or more.

Information on attendance in participating schools is summarized in Table 3. In general, enrollment increased between December 1986 and March 1987. This largely reflects the particular circumstances of the 1986-1987 school year. Because of the disruption of the previous term caused by the events surrounding the overthrow of Duvalier, parents -- and particularly parents of private school pupils, nearly all of whom must pay some tuition -- were slow to enroll their children last fall. They wanted to wait until they were sure the year was going ahead on schedule before making the investment, and by December enrollments were still below the forecast level.

A second phenomenon that will require some careful monitoring is also involved to a lesser extent. Some participating schools used their adoption by the project as a recruiting tool and drew students away form other institutions in the surrounding area. Project staff had to explain that enrollment increases engineered in this fashion would not be compensated by increased resources from project funds.

TABLE 3 :

Evolution of School Enrollments, Dec. 1986 - Mar. 1987

Region	School	Religious affiliation	Enrollmt 12/86	Enrollmt 3/87	Increase or Decrease
Cavaillon	Notre Dame de la Mer	Catholic	214	246	32
	St. Michel	Catholic	161	115	-46
	Presbytérale Berrette	Catholic	138	73	-65
	Presbytérale Pliché	Catholic	140	138	-2
	Presbytérale Immaculée Conception	Catholic	200	247	47
	Presbytérale Ti Francois	Catholic	176	239	63
	Presbytérale Gauthier	Catholic	160	368	208
	Ste. Thérèse de Bury	Catholic	21	50	29
	Evangélique Béthanie	Protestant	160	188	28
	Evangélique Baptiste	Protestant	130	213	83
	Méthodiste St. Georges	Protestant	54	116	62
	Méthodiste Dory	Protestant	252	293	41
Hinche	Jezi Ayisen de Hinche	Catholic	61	61	0
	Manman Bondyé	Catholic	230	230	0
	Sainte Thérèse	Catholic	313	307	-6
	Jezi Ayisen d'Abriot	Catholic	138	140	2
	St. Jean Bosco	Catholic	314	320	6
	Jezi Ayisen de Bentourib	Catholic	205	206	1
	Méth. Wesleyenne/Thomonde	Protestant	221	224	3
	Méth. Wesleyenne/Bernaco	Protestant	23	33	10
	Méth. Wesl/Tierra Muscady	Protestant	14	15	1
	Méth. Wesleynne/Salmadère	Protestant	36	91	5
	Méth. Wesleyenne/Casse	Protestant	274	281	7
	OVERALL TOTAL		3685	4194	509
	Overall Averages		160	182	22
	Catholic Subtotal		2471	2740	269
	Catholic Averages		177	196	19
	Protestant Subtotal		1214	1454	240
	Protestant Averages		135	162	27

No outcome data is yet available on progress made in indicators of instructional quality and administrative efficiency. The analyses and instruments necessary to evaluate these factors are presently being developed by project staff.

2.2. Research and Development

Project design provides for a research and development component to identify and adapt innovative approaches to primary education that would enable the project to deliver instruction to rural and poor urban children in a more cost-effective manner. In most respects, research and development represents a "lagged" component of the project, since the implementation strategy proposed in the PP calls for providing improved support to existing private primary schools with currently available resources before turning to the question of developing new approaches. Two elements of the R&D strategy are slated, however, for more immediate attention: first, inventory and evaluation of instructional innovations already in use in Haitian private primary schools; and second, development of low-cost forms of improved preprimary education to offer to participating schools.

2.2.1. Inventory of instructional innovations

One positive side-effect of the highly disparate nature of private education in Haiti is that a certain number of existing private primary school systems have developed on their own instructional innovations and adaptations about which there is little general knowledge. For this reason, it was proposed in the project paper to devote some initial effort in the research area to simply inventorying and evaluating the best practices already in use in different areas of Haiti. This work could evidently not be undertaken, however, until project staff was well enough in place and the simple logistics of school support were sufficiently well mastered to leave time and energy for these longer-range concerns. The Technical Service Center's specialist in educational research and evaluation only came on board in late January 1987 and was not able to begin to attend to these issues before the month of March. Progress is therefore anticipated in this area in the next three to six months.

2.2.2. Preprimary education

By the admission of all those who were involved in design of the IIBE Project, preprimary education constitutes a critical dimension of any effort to improve the quality of primary schools in Haiti. The majority of private primary schools have one or more preprimary classes (or "classes enfantines"). These, however, are generally staffed by the least qualified teachers, and the preprimary program consequently tends to degenerate into a simple childcare service aimed principally at accustoming the children to sitting still in one place before they enter the first grade. Little of the potential for improving child health and primary school learning outcomes that characterizes the best preprimary efforts is realized in these schools.

It therefore seemed natural to consider the inclusion of a preprimary component in the IIBE Project. Since USAID was already financing an existing program in Haiti (the Community Integrated Nutrition Education Centers or "CINEC") which had demonstrated some encouraging results, the Mission decided to incorporate this effort into the IIBE Project and channel its funding through IIBE. The administrative and financial mechanism for accomplishing this was to be a subcontract between the prime contractor and CARE.

The principal problem with this integration scheme was that the "CINEC model" -- that is, the type of preprimary program sponsored by CINEC -- cost too much for most private primary schools in rural areas to be able to sustain. After considerable discussion with Haitian counterparts, the team of consultants responsible for composition of the PP therefore proposed that the preprimary education effort funded by the IIBE Project be devoted to developing, testing and disseminating new lower-cost forms of preprimary education which built on the lessons learned by CINEC but stayed within a cost range accessible to project schools. Much of the first six months of the LOP was devoted to arriving at consensus on these orientations with CARE staff, establishing subcontracting mechanisms with CARE, thinking out how the development, experimentation and implementation of new models of preprimary education would be handled and what changes in CINEC administrative procedure these new tasks required. Progress was slowed by the tragic loss of the woman who had served as CINEC Coordinator for over six years, Mrs. Adeline Andre. Three months were devoted to recruiting and hiring her successor, Mrs. Evelyn Bazin-Verdier, who took office in early April 1987.

2.3. Private Sector Organization

The objective of the third component of the IIBE Project is to assist the principal actors in private education in Haiti to organize themselves in such a way as to ensure the continuity of the educational improvement effort. The strategy proposed in the project paper was the creation of two or more private education associations (Catholic, Protestant and, if possible, a third one for independent or "lay" schools) which would set up their own educational monitoring units -- or "Sectoral Service Centers" -- to help oversee project work in participating schools. It was proposed that these associations progressively take responsibility for a larger and larger proportion of project activities via subcontracts established with the prime contractor. Each association was to be composed of all interested educators from the subsector in question.

Very significant progress was made in the realm of this project component in the course of the elapsed semester, though, as always, the steps involved turned out to be somewhat lengthier than anticipated. The Mission ruled in August 1986 that the subsector associations would have to have legal status under Haitian law before IEES could establish subcontracts with them for portions of project implementation. The process of obtaining or confirming legal status turned out to be somewhat different for the Protestants than for the Catholics.

2.3.1. Creation of Protestant and Catholic education associations

A Protestant association entitled the "Fcdcration des Ecoles Protestantes d'Haiti" (FEPH) was created in May 1986 by representatives of 50 different Protestant churches and missions with activities in the area of primary education. The impetus for its creation was furnished by the IIBE Project, but the Protestant leaders had in fact a number of other reasons for associating and a number of issues of common concern to resolve. Letters of invitation were sent out to over 70 groups, varying in size from single churches with a small network of schools to nationwide denominations or missions with hundreds of schools under their jurisdiction. Over 50 responded and the FEPH was created on May 17, 1986. Obtaining legal status for the association turned out to be a rather prolonged process, however. Statutes were drawn up in October with legal

assistance, and the following month the necessary requests were filed with the Ministry of the Interior. The application took several months to work its way through the bureaucracy, then had to be signed by the Minister himself and published in the official government newspaper before the FEPH could finally enter into a legal contract. These steps were at last completed in late March 1987, and a subcontract for the remaining six months of Project Year I was drawn up between IEES and the association.

On the Catholic side, the situation was markedly different. Our Catholic counterparts maintained that they did not need to create a new legal association separate from the existing Catholic structures, because the Haitian government had granted legal status to the Catholic Church and to all of its created or subsidiary entities by virtue of existing agreements between the State and the Vatican, some dating from the 19th century. Considerable time was nonetheless required to unearth the relevant documents and laws and to submit them to AID legal counsel for opinion, but by February the issue had been cleared up to the satisfaction of all: the Catholic Church in Haiti did have the right to create subsidiary structures with full legal personality. In the meantime, the bishops had issued a decree establishing a Catholic educational association -- the "Commission Episcopale des Ecoles Catholiques" (CEEC) -- composed of three prominent Catholic clergy-educators which would function, under the supervision of the bishops' conference, to deal with all matters of common concern to Catholic schools in Haiti. In March, a subcontract between IEES and this group was drawn up and signed by both parties for the remaining six months of Project Year 1.

2.3.2. Organization of "lay" schools

As for the lay sector, it had been proposed in the Project Paper that the Ministry of Education be asked to assume responsibility for organizing IIBE activities among this third category of private schools. Since the lay sector had no pre-existing structure and since there was some uncertainty as to just how many schools of this category even existed in the principal target areas of the project (rural and low-income urban neighborhoods), the PP suggested that initial activities be concentrated on inventorying existing lay schools, contacting potential leaders and determining long-term objectives for organization of lay schools. Funds were provided for the creation within the

Ministry of Education of a "Service d'Enseignement Privc" (SEP) which was to occupy itself both with organization of lay sector participation in IIBE and with the various activities designed to reinforce Ministry capacity that made up the fourth component of the project.

The SEP was in fact created in the month of December by then Minister of Education Rosny Desroches, an office was set aside for it and a coordinator hired. Before this new structure could be put to work, however, there was a change in personnel at the Ministry and an attendant change in policy. The new Minister, Mr. Patrice Dalencourt, and his Chief of Cabinet, Mr. Frantz Lofficial, judged that the task of organizing the lay sector belonged more appropriately to the private education structures set up under the IIBE project than to the Ministry itself, and that the other institutional reinforcement activities sponsored by the project in the public sector (e.g., support for development of a new primary examination system) should be handled by the existing units of the Ministry that were already officially responsible for these functions. The Minister felt that the SEP was in fact a redundant structure and that, as a general rule, it was better to strengthen the capacity of existing units to perform their assigned tasks than to create new ones. On the other hand, the Ministry feared that support activities directed at lay schools would be further delayed if they were left within the purview of the public sector, precisely because no existing agency had clear jurisdiction over them.

The SEP was therefore "decommissioned" in March, and, with the assistance of two IEES consultants, the Ministry began reprogramming the public sector component of the IIBE Project to reflect these new understandings. Much of the support outlined in the PP for the creation of the SEP was transferred to the private sector components of the project, while the fashion in which the remaining monies were to be used for reinforcement of Ministry oversight and regulatory functions was more carefully defined.

From the point of view of the private sector portion of the project and of the IEES contract for its implementation, this therefore meant that a new task and a new unit would be added to the institutional framework of the project. The schema worked out in March called for the creation within the Technical Services Center of an "Independent Education Sector Unit" (IESU) charged with investigation the situation of lay schools in IIBE target zones and identifying

potential candidate schools as well as potential leadership structures. A budget of $272,000 (1986 dollars) was laid out for five and one-half years of activity. (See Annex A). The general schema was proposed to and approved by the PAC in March. Given the diversity of types of schools in this subdivision of private education (proprietary schools, community schools, schools created by rural development projects, as well as some unaffiliated church schools), the PAC felt it would be more accurate to refer to it henceforth as the "independent sector." The IESU was not yet considered to be a Sectoral Service Center on a par with those of the Catholics and the Protestants, because it was a creation of the project rather than of Haitian educators from the sector in question; and it would therefore run for the time being on monies added to the TSC budget rather than on the basis of a subcontract. However, one of the functions of the IESU would be to identify and bring together independent educators who might form an association that could then operate on much the same basis as those of the Protestants and the Catholics.

Full implementation of this new arrangement must await revision of the contract between AID and IEES, since it entails additional responsibilities and additional funds. We are nonetheless hopeful that the necessary steps will be taken by the month of June in order that a few "independent" schools, at least, may participate in the project next year.

In conclusion, it is clear that palpable progress has been made in the realm of institutional development. The first subcontracts with Protestants and Catholics drawn up in the month of March cover only the remaining six months of the first project year and include only the operation expenses of the Protestant and Catholic Sectoral Service Centers; but later this year they will be renewed for a longer period of time, and the legal mechanism now exists for progressively transferring into Haitian hands increased financial responsibility for project implementation.

2.3.3. Establishment of Sectoral Service Centers

For this transfer to take place, of course, the Sectoral Service Centers will need to develop strong administrative capacities. Important steps have been made in this direction. A director was designated for each of the Sectoral Service Centers in October by Protestant and Catholic members of the PAC. By

November, both of these people were employed full-time on the project. They then identified candidates for the remaining positions in each sectoral service center -- both professional and support staff -- and submitted them to the sectoral education councils for final decision. Nearly the full complement of staff on both Protestant and Catholic sides was thus brought on board in the month of January, and the two SSCs began operations in the new locale that they share with the project's Technical Services Center. Project vehicles and furniture were delivered in the same month, and by February the staff of the two centers were making regular trips to visit the project's pilot schools.

We are now instituting a regular schedule for the submission of reports from the Directors of the SSCs to their respective Sectoral Education Councils (the FEPH and the CEEC) and from these bodies to IEES. The next quarterly report should reflect the fruit of this reporting scheme.

2.4. Public Sector Reinforcement

The fourth component of the IIBE Project does not fall within the purview of the contract between AID and IEES, since it is to be implemented directly by the Ministry of Education via a bilateral accord between the American and Haitian governments. However, progress in this area is obviously of critical concern to the private sector portion of the project and deserves therefore to be noted in this report.

The signature of the original bilateral accord in August 1986 raised a few problems of principle that had to be ironed out over the following months. Chief among these was concern on both Catholic and Protestant sides that the language of the accord seemed to give the Government responsibility for implementation of the entire project and therefore accord it powers of intervention in private education that it had not theretofore enjoyed, or at least had never yet exercised. Both Protestants and Catholics felt that they had been inadequately consulted about formulation of the bilateral accord at the time of the signature of the agreement. (It had been prepared very rapidly in August to meet an August 31 deadline, but Mission representatives felt confident that they had gotten clearance from all concerned parties.) The matter was resolved when representatives of the two sectors met with the Minister of Education and agreed that an addendum to the original document would be drawn up and signed specifying that the bilateral accord should not be interpreted as

modifying in any fashion existing arrangements between the Government of Haiti and the two sectors of religious-affiliated education. (Annex B).

The original bilateral accord was signed by the Mission and the Ministry of Education on August 29, 1987. It included basically all the activities and funds outlined for the public sector in the Project Paper, though some errors were made in transcribing these. The short career of the Service d'Enseignement Privc, as well as the revisions of the bilateral accord subsequently proposed by the new Ministry staff, have been described above (section 2.3.2). In its present form, the document covers only reinforcement of the Ministry in the areas of examination, school accreditation, school inspection, teacher certification and financial planning. The amendments will hopefully be signed in the course of the next trimester, allowing the public sector portion of the IIBE Project to get off the ground before the start of the 1987-88 school year.

3. PROJECT ORGANIZATION AND MANAGEMENT

It was clear from the outset that implementation of the three components of the IIBE Project that concern the private sector would be a complex task, because of the number and diversity of schools to be assisted, their high level of need, and the lack of existing structures to coordinate activities. Moreover, the dual instructional and institutional objectives of the project meant that it was necessary at the same time to undertake interventions of increasing scale in the field and to build up new structures to supervise them. In short, for valid educational improvement activities to take place in a sustainable manner in schools, there were a host of material, organizational and logistic preconditions that had to be met concurrently.

The management and organization functions that need to be exercised at a central level include the following:

3.1. Project planning and policy-making

3.2. Programming and strategy

3.3. Budgeting and accounting

3.4. Personnel recruitment and training

3.5. Personnel administration

3.6. Materiel procurement

3.7. Public relations

3.8. Project monitoring, evaluation and reporting

3.9. Field support activities

- 3.9.1. School selection
- 3.9.2. Local planning: needs assessment and performance contracts
- 3.9.3. Teacher training
- 3.9.4. Material procurement and delivery
- 3.9.5. School inspection
- 3.9.6. Local monitoring and evaluation

Progress made in regard to project management over the elapsed semester will be briefly analyzed in these categories.

3.1. Planning and policy-making

Planning and policy-making functions are basically vested in the Project Administrative Council (PAC), which, as discussed above, includes representatives from all the principal parties concerned by the private sector portion of the IIBE Project. The PAC is in fact the lineal descendant of the Protestant-Catholic "comitc mixte" which took such an active role in IIBE Project design in 1985-1986. After the signing of the contract between AID and IEES and the inauguration of the project in September 1986, the group was rechristened "Project Administrative Council," set itself a bi-weekly schedule of meetings and initiated a period of reflection on its status, statutes and operating procedures.

This reflection continued on and off throughout the next six months. In September, a subcommittee prepared a first draft of statutes for the PAC. In November, at the request of the PAC, IEES engaged an outside consultant (Dr. Simon Fass) to propose a strategy for progressive transfer of administrative and financial responsibility for the project to Haitian institutions as well as a delineation of the role of the PAC in this strategy. In February, the PAC set up another subcommittee to carry further the work of definition of its statutes and operating procedures, and this group submitted its report in March. Written analyses of the issues were also prepared by the IEES Country Coordinator.

Basically, the modus operandi and practical competencies of the PAC became increasingly clear over this period and it took charge of a broader range of directive functions, whereas its formal status remained somewhat ambiguous. As related below, the PAC supervised recruitment of the staff of the Technical Services Center, negotiation of contracts with staff and establishment of personnel procedures. It also set policy concerning procurement, school selection, office rental and a series of other operational matters of great importance to project implementation. The ambiguity derived from the fact that the PAC per se has no legal status. The institutional development strategy of IIBE has involved the creation of private sector education associations -- Protestant, Catholic and perhaps eventually "independent" ones -- which will take responsibility for a growing proportion of project activities. A strategy and a mechanism for this transfer were proposed by Dr. Fass after his November-December consultancy. They involve maintaining the prime contract with an outside organization (presently IEES) for the six-year duration of the project, but transferring progressive "blocks" of project funding and implementation responsibility into the subcontracts, so that at the end of the LOP the prime contract would constitute no more than a shell or framework that could be removed, leaving the Haitian education associations able to function thereafter on their own.

Because of the current political and practical necessity of creating separate associations for Protestants, Catholics and -- conceivably -- independent schools, the PAC itself does not enter directly into this strategy for the time being. Its existence is ad hoc and its authority is derived from the fact that all members of the executive committees of the two legally constituted associations (FEPH and CEEC) sit on it and choose to conduct business in this integrated fashion, and from the fact that IEES and AID (whose representatives also sit on the PAC) choose to refer all questions of project policy and planning to it. This arrangement has proved as functional and as tactically necessary as it is statutorily ambiguous.

It is quite possible that well before the end of the LOP, the private education associations will work out a formal mode of affiliation that will give the PAC a more organic role in the assumption of educational improvement responsibilities. Already it is evident that some common organ of the two (or three) units of the private sector is necessary to carry on dialogue with AID and the contractor about project policy. The key role of the PAC if further

demonstrated by the fact that it has become the designated interlocutor of the Ministry of Education -- that is, the unit charged with representing the private sector as a whole in negotiations with the Government.

3.2. Programming and strategy

Program and strategy in the first six months of project operations were generally based on the guidelines laid out in the Project Paper, though lack of personnel made it difficult to realize all the aspects of project methodology that should enter into play. Once the two Sectoral Service Center directors were on board and the first won TSC technical assistances had been hired, this group of four, plus the Project Supervisor from IEES, constituted in effect the working committee that had principal responsibility for making decisions about program and strategy -- and submitting these to the PAC whenever they involved basic policy options.

It is already evident that coordinated programming of the diverse activities that have to go on each year will require that project personnel familiarize themselves with some basic planning tools like PERT.

3.3. Budgeting and accounting

The financial operations of the IIBE Project have two aspects: the first or prospective one concerns budgetary planning and programming for upcoming periods of project implementation; the second, or retrospective one, obviously concerns bookkeeping on expenditures and accounting for the use of project funds. Accounting must reply to imperatives established by USAID and the prime contractor; budgetary planning and programming must furnish the information and tools necessary to make judgments about what levels and kinds of operation are possible in the future. Insofar as the PAC is to play a central role in planning and programming, this information must moreover be made accessible and comprehensible to its members. The challenge in organizing the financial operations of the project has been to relate these two aspects -- accounting and program budgeting -- and link both solidly to the underlying substantive goals of the project.

There are two other characteristics of the IIBE Project that create an unusual situation for its financial management:

(1) The first is the number and importance of subcontracts. Subcontracting is not simply a means for implementing the project. It is also closely linked to the underlying institutional development goals of the project. To the degree counterpart Haitian institutions take financial responsibility for portions of project implementation, they will acquire the capacities necessary to function on their own. This means a rather more complex mode of financial operation, because one must in relatively quick succession set up budgetary planning and accounting procedures adequate to the management of such a large project, help subunits to acquire the skills and experience necessary to use them, transfer an increasing proportion of management responsibility and monitor performance -- all without losing sight of the portions of project management for which the prime contractor retains principal responsibility.

(2) The second aspect of the project that has a major impact on financial operations is the volume and nature of local procurement that has to be carried out. The project proposes to furnish between 300 and 400 rural primary schools with a series of inputs needed to improve quality of instruction. The vast majority of these are to be bought -- and in many cases manufactured -- locally. Here again there is an important linkage between the substantive goals of the project and its mode of financial organization. The PAC opted early on for a policy of buying Haitian-origin materials and services to support schools wherever possible, in order that the funds expended produce a double effect -- i.e., both at the procurement end of the chain and at the delivery end. This has meant, for example, in the case of school furniture, that we have chosen to contract with local vocational-technical schools to produce the materials that project schools need. One consequence of this policy, however, is that project implementation requires maintenance of, and accounting for, a very large revolving fund, since many local suppliers need advances to start work and few can wait the time necessary for bills to be paid by a US-based institution.

To further complicate this picture the first year, due to the lack of permanent technical assistance through the month of January, procurement of all materials for the first cohort of pilot schools and of those required by the interim project offices had to be handled by short-term consultants sent in by

IEES or contracted locally. Despite these handicaps, the necessary funds were transmitted, expended and accounted for to get at least a significant portion of school support materials to the field, to set up the operations of permanent project offices and to acquire essential equipment like vehicles, office furniture and office machines. In March 1987 an administrative assistant and an accountant were hired as staff of the Technical Services Center, both to take charge of local administrative and accounting operations and to train related staff of the Sectoral Service Centers in these techniques. With the arrival of this personnel and the establishment of a project account at the Bank of Boston in Port-au-Prince, financial management of the project was greatly facilitated.

Regular financial reports are submitted to AID by FSU at the end of each quarter. A copy of the financial report for the period ending on March 31, 1987 is appended in Annex C. We are still not able to submit full financial reports to the PAC, however, in a form that provides its members with the information needed for program budgeting. The set of data needed for this type of reporting is a little different from that which goes into the accounting report to AID, and we are still working on a system for translating one into the other and simultaneously tracking both kinds of data. Two partial reports on project expenditures with approximate projections for the rest of the first project year were submitted to the PAC at the end of January and at the end of March. (Annexes D and E). They convey an idea of the kind of analysis that we need to make on a regular basis. We expect to have this problem resolved by the end of the upcoming quarter.

3.4. Personnel recruitment and training

3.4.1. Recruitment: Technical assistance

A nearly full complement of personnel for the Technical Services Center was recruited and hired in the course of the elapsed semester. Three technical assistants were scheduled to come on board in the first year of project operations: an Educational Planner and Financial Analyst to play the role of Director of the Technical Services Center and Chief of Party, an Educational Administration and Institutional Development Specialist, and an Educational Research and Evaluation Specialist. Scopes of work for these positions were laid out in the IIBE Project Paper.

Recruitment for the three technical assistance positions was opened in the month of August 1986 both in Haiti and in the United States. Recruitment announcements appeared in Haiti in three national newspapers (Le Nouvelliste, Le Matin and Haiti Libcrce) and were carried in this country in the Chronicle of Higher Education, the New York newspaper Haiti Progress and the State of Florida Position Announcements Bulletin, In addition, the position announcements were disseminated to all IEES institutional coordinators and to more than one hundred other professional contacts with experience in the area of educational projects in developing countries. In all, seventy-six applications for the three positions were received. These were all transmitted to Haiti, where they were reviewed and culled in a multiple-step process by a subcommittee of the Project Advisory Council including representatives from the Protestant and Catholic education sectors, the USAID Mission and the contractor.

The first step in this evaluation process resulted in the identification of five to eight "semi-finalists" per position. Additional information -- including reference letters and written responses to two questions -- was then asked of these people, and the added material was evaluated once again by the Selection Subcommittee. At the end of the second round, a short list of three candidates per position was identified. (The list totaled eight persons, because one was a candidate for two different positions.) These "finalists" were then asked to come to Port-au-Prince at project expense for an interview in the last week of November or the first week of December. Three of them were already resident in Haiti, and two more were able to combine the trip with other professional obligations, so that airfare only had to be paid at last for two people.

The interviews were conducted on schedule, and the Selection Subcommittee presented its report and recommendations to the Project Advisory Council on December 15. The subcommittee had arrived at a clear choice for the second and third technical assistance positions, but had not arrived at a consensus concerning the Chief of Party. The PAC expressed a tentative preference, but the USAID Mission did not feel the qualifications of the candidates were strong enough to fill such an important position. After a "summit meeting" between representatives of the USAID Mission and other members of the PAC on December 21st, it was decided to leave the recruitment for Chief of Party open and to invite for an interview one remaining candidate who had particularly strong

qualifications but had been passed over because he was unavailable to assume the position before July 1987.

This final candidate -- Dr. Jean Moisset of the University of Laval -- was interviewed in Port-au-Prince in the third week of January. All parties felt him to be eminently qualified for the position, and during its meeting of January 21, the Project Administrative Council asked the contractor to offer him a position beginning on July 1, 1987, subject to successful contract negotiations. Dr. Moisset accepted the offer and visited Haiti again from March 3 to 8 to negotiate his contract and to begin working with the rest of the IIBE staff on project planning.

Dr. Moisset concurred with the feeling of USAID Mission staff that it might be advisable to add one more technical assistant to the team -- a specialist in project management who could help the rest of the personnel with the work organization problems posed by an undertaking as massive as the IIBE Project. The PAC expressed some reservations about this position, however. The compromise solution that was adopted involved two points:

(1) IEES would propose terms of reference for this additional position to the PAC and then open an international recruitment in order to get a set of strong candidacies.

(2) The decision about whether actually to create an additional position and to pick one of the candidates to occupy it or simply to call on various of these specialists for short-term consultancies would be held in abeyance, however, for two or three months so that everyone involved could make a clearer judgment about the necessity of taking additional technical staff.

Contract negotiations with all three technical assistants were conducted by a subcommittee of the PAC comprising representatives of the two sectors, the Mission and the contractor. The PAC in fact took responsibility for establishing policy with regard to salaries and benefits for all project staff. Council members were concerned both that work be properly remunerated and that too great a disparity in levels of remuneration be avoided, as they felt that this would be contrary to the spirit of the project and have negative effects on work relations.

The first two technical assistants hired -- Mr. Antoine Levy as Educational Administration Specialist and Dr. Maryse Roumain as Educational Research and Development Specialist -- were engaged on local contract. Both are Haitian nationals who recently returned to Haiti after working and studying in the United States for a number of years. The candidate chosen for Chief of Party -- Dr. Jean Moisset -- is a Canadian citizen of Haitian origin who will be working under expatriate contract starting on July 1, 1987.

3.4.2. Recruitment: Support personnel

Most of the support personnel of the Technical Services Center -- an administrative assistant, an accountant, an executive secretary and a secretarial assistant -- were engaged between January and March. In the first three cases, a recruitment was carried out that was similar in method, if not in scope, to the recruitment of technical assistance: Position openings were announced in the press, candidate applications were evaluated (more than 20 were received for each of the three posts), "finalists" were interviewed and final selection was made with the endorsement of the Project Administrative Council.

Three types of support personnel positions defined in the project paper remain to be filled: (1) a Dispatcher and Warehouse Supervisor for the Technical Service Center; (2) one research assistant in each of the two regional branches of the TSC, slated for operation in Hinche and Cavaillon; and (3) one secretary for each of these branch offices.

3.4.3. Inservice training

Inservice training of personnel is an integral part of IIBE project implementation and will take three forms: (1) on the job training of Sectoral Service Center staff by TSC technical assistants; (2) inservice training workshops and seminars organized by the TSC and/or short-term technical assistants; and (3) offshore short-term training.

There has not been time to organize anything in the way of the last two varieties of training cited, given that most project personnel were not in place until well into the month of January. We expect, however, to outline a strategy and schedule of training in each of the project's forthcoming workplans.

The prime rationale for short-term technical assistance under the IIBE Project is to provide on-the-job training -- and occasionally workshop training -- for project staff as a means of increasing their technical capacities, or to perform particular technical tasks that do not justify the creation of a full-time permanent position. This year we have in fact had to use a good deal of short-term technical assistance of the second category to fill in for staff who had not yet been recruited. Dr. John McLanahan of FSU, in particular, has played a vital role in this area by organizing the complex procurement tasks of the project and providing initial assistance with the set-up of permanent project offices. The roster of consultants used is presented in Table 4.

3.5. Personnel Administration

The TSC Administrative Assistant started work in the month of February and began to design a set of personnel regulations and procedures for the IIBE Project central office, using as a model USAID Mission regulations and those of several local organizations. For the most part, the TSC and the SSCs will follow the same procedures. Exceptions arise in cases where USAID norms differ from Haitian ones, as, for example, business hours. In these cases, the TSC will conform to USAID practices, whereas the SSCs, whose budget and procedures are designed to enable them to function as permanent Haitian institutions, will follow a model closer to local practice.

3.6. Material Procurement

Because of the number of schools that will be involved in the IIBE Project and the variety of their needs, material procurement for the project is both a critically important and a complex function. Moreover, like the area of budgeting and financing, it is not just a support operation to facilitate the accomplishment of instructional goals, but an activity that is itself integrally related to the impact of the project. The PAC decided in the fall that wherever it was possible and reasonable cost-effective, materials and services for school support should be purchased locally, in order that monies expended for the project have a double impact: that is, both at the procurement end and at the delivery end. In conformity with this principle, contacts were made with a number of potential suppliers and a first contract was established with a local vocational-technical school -- the Ecole Nationale des Arts et Metiers -- for

TABLE 4:
IIBE Consultant Roster

Consultant	Institution	Dates	Work assignment
Peter Easton	FSU	Sept 21 - Oct 9 Oct 26 - Nov 11 Nov 30 - Dec 13 Jan 18 - Jan 28 Feb 11 - Feb 21 Mar 4 - Mar 14 Mar 25 - Apr 4	Project supervision
John McLanahan	FSU	Oct 26 - Nov 11 Nov 23 - Nov 29 Jan 4 - Jan 10 Feb 4 - Feb 11 Feb 25 - Mar 4 Mar 23 - Mar 28	Procurement
Stephen Anzalone	IIR	Sept 15 - Oct 3	Procurement
		Mar 1 - Mar 11	Public sector component
Mary Pigozzi	IIR	Sept 22 - Oct 10 Dec 1 - Dec 13 Jan 11 - Jan 21 Mar 1 - Mar 11	Preprimary component
Antoine Levy	FIU	Oct 6 - Dec 5	Organization of field activities
Simon Fass	Univ Minn	Nov 22 - Nov 29	Institutional development strategy

the production of the school furniture required in the course of the first year of project implementation.

Some difficulties were experienced in applying the principle of local supply. These derived for the most part from the fact that local suppliers were not accustomed to furnishing the quantities the project needs, to submitting bids where USAID or Florida State University regulations require competitive procurement, or to billing and waiting for payment for the period typically required by the contractor's purchasing office. The experience of the project's first "pilot" year has been invaluable in working out these kinks in the procurement system.

3.7. Project Monitoring, Evaluation and Reporting

3.7.1. Monitoring and evaluation

Until the month of February, monitoring was carried on in somewhat reduced fashion, due to staff limitations. Schools in the two pilot zones were visited once a month on the average during this period, generally by the half-time monitor who had been hired in each of the zones. There were two visits to most schools over this period by central staff -- either one of the newly appointed Sectoral Service Center Directors or a consultant.

In late January, the long-term technical assistant charged with evaluation and research activities assumed her functions, and by means of site visits in February and March, assembled much of the data that serves as a basis for the tables presented above. One of the critical challenges in the next six months will be the establishment of a monitoring and evaluation system that can be carried out in large part by the regional staff of the project under the supervision of the TA.

3.7.2. Project reporting

Regular reporting is essential to productive project management. It constitutes, moreover, the other side of planning: reports are an occasion for reflection upon the degree of achievement of past workplans and lay the groundwork for better planning in succeeding periods. The structure of contracts and subcontracts out of which implementation of the IIBE Project is built provides for an interlinking set of activity reports. The nature of these

reports and their relationship to planning is indicated in the document included as Annex F. Briefly speaking, every major activity in project implementation -- including field trips, workshops, and consultancies -- is to be covered in a report. In addition, the SSCs submit monthly reports to their respective sectoral education councils, and the councils submit quarterly reports to IEES. At the same time, the TSC submits monthly reports to IEES, and IEES submits quarterly reports to AID and the PAC.

The language of reporting poses a problem that remains to be resolved. AID regulations require English-language reports, whereas devolution of prime administrative responsibility to Haitian institutions would seem to presume that French (or Creole) be used, as these are their working languages. The PAC has, in fact, formally requested that all documents submitted to it be presented in one of the two national languages of Haiti. Though a number of people in the PAC, the SSCs and the TSC have English-language competency, this characteristic is neither universally nor randomly distributed, and use of English as a working language therefore immediately biases somewhat possibilities of participation.

3.8. Public Relations

Two critical areas are subsumed under this category: (a) coordination of activities with other organizational entities involved in support for primary education; and (b) presentation of the project to the public at large.

3.8.1. External coordination

Coordination of and with the various Protestant, Catholic and (potentially) lay or "independent" groups active in the area of rural primary education is obviously an integral and "internal" preoccupation of the project. However, contacts must also be established with other actors in the field, such as the Ministry of Education, the other donor agencies and certain private voluntary organizations.

Relations with the Ministry have been focused in particular on the negotiations about the fourth component of the IIBE Project and about responsibility for organization of independent sector schools described in sections 2.3 and 2.4 above. To facilitate coordination of the private sector and public sector portions of the IIBE Project, representatives from the Ministry and from the PAC agreed to the idea of creating a "coordinating

council" which would meet at least once a quarter, though no official meeting has yet been held. However, representatives of the PAC have been asked to participate in discussions at the Ministry about mechanisms for state subsidy of private school teachers' salaries, and it seems likely that the structures developed under the IIBE Project will play an increasingly important role as counterpart institutions representing the private sector in negotiations about national educational planning and policy.

We have been slower to establish contacts with other outside organizations, once again principally through lack of staff time to devote to this concern, and in particular because of the absence of the TSC Director, who will assume many of these "diplomatic" functions.

3.8.2. Publicity and outreach

The Project Administrative Council has also been concerned to take initiative at appropriate moments in informing the public at large of the nature and plans of the IIBE Project. Even if one wanted to keep the matter secret -- which is not at all the case -- it would be nearly impossible to do so in an environment where informal networks of communication operate at such high capacity. Moreover, it is evident that the project has a generic need to make itself known, if only to solicit applications from needy and deserving private schools.

The problem has been how to present accurate information before inaccurate news is spontaneously generated, while simultaneously avoiding the dangers involved in announcing any new foreign aid package -- and particularly an American initiative -- in an atmosphere as highly politically charged as the current one in Haiti. The PAC has wanted to make it clear that this project is funded and supported by USAID, but that it has been designed and is being administrated by and for Haitians, in order to avoid being painted (even by their own constituencies) with the brush sometimes abusively and indiscriminately applied to US foreign policy.

The signature of the original bilateral accord at the end of the month of August was announced by front-page articles in the Port-au-Prince newspapers, but few details were given. The next news of import was the creation of the Protestant and Catholic education federations (the FEPH and the CEEC), and this

also appeared in the press. The question of holding a press conference in early January on the project was discussed in two PAC meetings, but it was agreed that this would be inadvisable in the current political context and that it would be better to disseminate information next to all those interested in participating in the project through a carefully-worded brochure and flyer.

As of the end of March 1987, drafts of the texts of the brochure and of the flyer are in circulation, a trial flyer has been printed up and the PAC will be evaluating both before approving their widespread use. This should take place, however, by June, concurrent with the period of contact with the second cohort of schools.

3.9. Field support activities

Under this final category are regrouped all the types of activity that the project office undertakes in direct support of schools or that it attempts to help them to undertake on their own. Included are school selection, local educational planning (needs assessment, establishment of performance contracts), teacher training, material procurement and delivery, local monitoring and evaluation. Whereas above under the first section of this report, field activities are examined from the point of view of their results and their impact on the essential instructional objectives of the product, this section is concerned with the status of the systems put in place to provide necessary support to project schools.

Virtually all field support until the month of February was carried out in an episodic and *ad hoc* fashion with available short-term staffing. Structures for field support remain for the most part to be created. The first major step in this direction will be the hiring and training of regional project monitors, presently scheduled for the upcoming quarter.

4. PROBLEMS ENCOUNTERED AND LESSONS LEARNED

This first seven months of project implementation has been a period of set-up and installation. It also has been a period for the start-up of pilot activities in 23 schools in the field. The coincidence of those two conditions has been the source of some difficulties. Theoretically, it might have been

better to set up first, then launch field activities. Two considerations make this reasoning less persuasive, however;

(1) Both Mission staff and Haitian counterparts judged it politically and institutionally critical to get initial activities going in the field by the beginning of the 1986-1987 school year.

(2) We have probably learned more this year about the kinds of structures necessary to make the project run precisely because we had simultaneously to get activities going in the field -- particularly in the critical area of procurement and material logistics.

The challenge has therefore been to maximize the lessons learned and to succeed at the task of initial set-up while minimizing the dangers involved in such a rapid commencement of activities. First year schools have inevitably suffered some in the process, in the sense that they have not received the full complement of resources proposed in the PP -- though they all received significant support and much more than they had previously enjoyed. In a larger sense, the potentially more serious problem is that project methodology has not been fully applied or evaluated and some undesirable precedents have been set. It will be critically important in the course of the second project year (and the first year of large-scale extension) to give close attention to application of the full organizational and instructional methodology of the project.

The most significant risk that the project runs, once management issues have been sufficiently well resolved so that we are able to deliver materials and services to all participating schools on time, is that we will become simply another alternate source of resource support. A certain number of schools will be assisted for the duration of the project and will then revert to their status quo ante, without any more lasting effect having been produced on them, on surrounding schools or on the systems of which there are a part. Given the overall pattern of retrenchment among the philanthropic sources that have supported rural primary education over the last decade (amply noted in the project paper), there is always the possibility that the IIBE project will perform a simple function of "displacement" or "replacement."

The fundamental objective of the project, however, is to make the support offered a vehicle for stimulating schools to improve quality of instruction and efficiency of school administration, to develop their local resource base and to

move toward a higher level of self-sufficiency. The question of project methodology therefore requires constant attention, both to avoid becoming a simple conduit for a temporary increase in resources and because the approaches proposed in the project paper are themselves greatly in need of elaboration, evaluation, modification and adaptation.

At most points, the methodology suggested in the project paper is little more that a starting hypothesis about the approaches necessary to accomplish project goals. It could not constitute the fruit of long experience with promoting educational quality and increased administrative efficiency in rural private schools in Haiti, because that experiencee was nowhere available in summary or synthetic form. Approaches to the training of school directors furnish one example. The project paper provided for in-service training of school directors as a necessary means to the goal of achieving greater efficiency of school administration and setting the school on the road to greater self sufficiency. The PP did not specify what this training was to contain, however, nor deal with the sociological issue that makes such an undertaking a very touchy matter among private schools in rural Haiti: namely, the fact that in many schools, management functions are carried out not by the school director, but by the local pastor or priest, who may feel distinctly threatened by the notion of the director receiving technical training designed to give him or her more effective control over school operations. It is this kind of issue that needs to be dealt with in making project methodology fully operational.

The good news is nonetheless that, by virtue of the institution development activities undertaken this year -- and the experience of the pilot schools in the field -- we are now well positioned to make the necessary adjustments and to begin deriving from project experience a workable and authentically Haitian version of school improvement methodology. And this was precisely one of the underlying objectives of the project.

Given the initially unorganized state of private sector education and the large number of schools involved, it seems upon reflection that the project must go through several stages in building up to a significant impact on instructional outcomes in rural schools. These could be outlined as follows, though it should be kept in mind that their sequence represents more a question

of relative emphasis than of exclusive concern: in fact, all of these issues are present from the start, but they come front stage, so to speak, in the order indicated.

In the first stage, the emphasis fell on the **political** task of bringing representatives of private education together and the **conceptual** task of designing the project. This coincided with the 1985-1986 school year.

In the second stage, the key issue was the **institutional** one of developing working associations and service centers and engaging competent staff. This has occupied much of the 1986-87 school year.

In the third stage, careful attention must be paid to **management** issues in order to develop and get control of the mechanisms necessary to furnish needed materials and services to a large number of schools in widely spread regions of the country. We entered into this stage in March of this year and hopefully will have things pretty well under control by the end of the calendar year.

In the fourth stage, which will occupy the whole of the upcoming school year, the school support methodology laid out in the project paper -- instructional, administrative and political -- must be applied, evaluated and revised in order to ensure maximum impact on project goals.

5. PLANS FOR THE UPCOMING TRIMESTER

Principal activities for the second trimester of calendar year 1987 are presented in Table 5 along with their objectives and anticipated dates.

Table 5 :: Principal Project Activities for the Second Quarter of 1987

Dates	Activity	Project Component	Objectives	Parties Responsible
Apr-June	Inspection of first cohort schools	1	Perform end-of-year inspectns in 22 schools.	TSC/SSCs
Apr-June	Deliver school furniture	1	Deliver remaining school furniture to 1st cohort	TSC/SSCs
April	Initial identification new project schools	1	Identify approx. 100 new schools in 5 regions to make up 1987-88 cohort.	SSCs
April	Recruitment of regional project monitors.	3	Recruit 5 Protestant and 5 Catholic monitors.	SSCs
May 15-20	Training of regional project monitrs	3	Familiarize monitors w/ IIBE Project and prepare for regnl inspectn resp.	SSCs/TSC
June	Census of new school needs	1	Visit new schools & conduct analysis resource needs w/ local personnel	Monitors
May-June	Preparation teacher training sessns	1	Logistic preparatns for training 600 tchrs 7/87	SSCs
May 35-31	Training of teacher trainers	1	Initiate tchr trainers to IIBE methodology.	TSC
June	Develop performance contracts	1	Elaborate form & methodology perf. contracts.	TSC
May-June	Develop methodology for school bldg renovation & income generation activities	1	Visit schools & define approaches with local leaders.	TSC/SSCs
April-May	Survey of existing private preschool education	2	Inventory innovative methods already in use	PEP/CARE
June	Identification experimental preprim. centers	2	Identify 30 schools of new IIBE cohort to take part in preprim. expermt	PEP/CARE
May 5-10	Training of preprimary staff	2	Condct wrkshp on preprim outcomes for CARE/PEP.	IEES
June	Creation of Independent Schools Investigation Unit within TSC	3	Recruit staff & establsh office for ISIU	TSC
June	Completion of recruitment for Project Management Specialist	3	Evaluate candidacies and decide about hiring PMS	IEES
June	Completion, publication and dissemination of project flyer.	1	Correct existing draft, submit to PAC & produce	TSC/SSCs

LIST OF ANNEXES

A. Draft Budget for Independent Education Survey Unit

B. Amendment to bilateral accord

C. Financial Report to AID for period ending March 31, 1987

D. Financial Report to PAC for period ending January 31, 1987

E. Financial Report to PAC for period ending March 31, 1987

F. Proposed IIBE Reporting System

ANNEX A

Sector/TSC Operations

	Yr1	Yr2	Yr3	Yr4	Yr5	Yr6	Total
Chief of Service		9000	9000	9000	9000	9000	45000
Evaluation and Operations Officer	2500	7500	7500	7500	7500	7500	40000
Secretary	1600	4800	4800	4800	4800	4800	25600
Monitors (2)		7200	7200	7200	7200	7200	36000
National Survey of Lay Schools	12000						12000
Office Rent	1000	3000	3000	3000	3000	3000	16000
Microcomputer	5000						5000
Other Office Equipment	4000						4000
Driver	800	2400	2400	2400	2400	2400	12800
Vehicle (FWD)	15000					15000	30000
Motorcycles (2)		3000				3000	6000
Vehicle Maintenance and Insurance	500	1000	1000	1000	1000	1000	5400
Vehicle Fuel	500	1500	1500	1500	1500	1500	8000
Motorcycle Maintenance and Insurance		750	750	750	750	750	3750
Motorcycle Fuel		800	800	800	800	800	4000
Travel Per Diem	500	2000	2000	2000	2000	2000	10500
Office Supplies	500	1000	1000	1000	1000	1000	5500
Meetings Lay Sector Council		500	500	500	500	500	2500
TOTAL	43900	44450	41450	41450	41450	59450	272150

ANNEX B

A.I.D. Project No. 521-0190

Projet No. 521-0190 de l'A.I.D.

ADDENDUM TO MEMORANDUM OF GRANT AGREEMENT

ADDENDUM AU MEMORANDUM D'ACCORD DE DON

BETWEEN

ENTRE

THE REPUBLIC OF HAITI

LA REPUBLIQUE D'HAITI

AND

ET

THE UNITED STATES OF AMERICA

LES ETATS-UNIS D'AMERIQUE

FOR

POUR

THE INCENTIVES TO IMPROVE BASIC EDUCATION PROJECT

LE PROJET D'AIDE POUR L'AMELIORATION DE L'EDUCATION DE BASE

Dated: NOV. 25 1986

En date du: 25 NOV. 1986

ADDENDUM TO MEMORANDUM OF GRANT AGREEMENT

Dated: NOV. 25 1986

This Addendum provides the following clauses to the Memorandum of Agreement signed on August 29, 1986, between the Republic of Haiti, acting through the Ministry of Education (MEN), and the United States of America, acting through the Agency for International Development (A.I.D.).

This Addendum is stated as follows:

The Ministry of National Education (MEN), the Private Sector and A.I.D. will assure the functioning and follow-up of their respective components of the project.

The Bilateral Agreement A.I.D./G.O.H. No. 521-0190 deals only with the public sector component of the overall project.

Neither this Memorandum of Agreement nor the Bilateral Agreement between A.I.D. and the Ministry of National Education shall be interpreted as modifying, amending or changing in any way the nature of agreements, understandings, modus operandi or similar preexisting relationships between the Government of Haiti and the representatives of the private sector.

IN WITNESS WHEREOF, the Republic of Haiti and the United States of America, each acting through its duly authorized representative have caused this Addendum to be signed in their names and delivered as of the day and year first above written.

UNITED STATES OF AMERICA

Linda E. Morse
Acting Director
USAID/Haiti

ADDENDUM AU MEMORANDUM D'ACCORD DE DON

En Date du: NOV. 25 1986

Le présent Addendum apporte les clauses suivantes au Mémorandum d'Accord signé le 29 août 1986 entre la République d'Haiti, agissant par l'intermédiaire du Ministère de l'Education Nationale (MEN), et les Etats-Unis d'Amérique agissant par l'intermédiaire de l'Agence pour le Développement International (A.I.D.).

Le présent Addendum est formulé comme suit:

Le Ministère de l'Education Nationale, le Secteur Privé et l'A.I.D. assurent le suivi et veillent à la bonne marche du projet, chacun en ce qui le concerne.

L'Accord Bilatéral A.I.D/G.O.H No. 521-0190 concerne uniquement le volet secteur public du projet global d'éducation.

Ni le présent Mémorandum d'Accord, ni l'Accord Bilatéral entre A.I.D. et le MEN ne devra être interprété comme modifiant, amendant ou changeant d'une manière quelconque la nature des accords, ententes, modus operandi, ou rapports similaires préexistants entre le GOH et les représentants du secteur privé.

EN FOI DE QUOI la République d'Haiti et les Etats-Unis d'Amérique chacun par l'intermédiaire de son représentant dûment agréé ont fait signer le présent Addendum en leur nom et l'ont fait remettre à la date de l'année susmentionnée.

REPUBLIQUE D'HAITI

Par:
Rosny Desroches
Ministre
de l'Education Nationale

MINISTERE DE L'EDUCATION NATIONALE

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ANNEX C

FLORIDA STATE UNIVERSITY
USAID/IEES PROJECT
FINANCIAL SUMMARY REPORT
HAITI MISSION EXPENDITURES
TASK ORDER 8

SEPTEMBER 1986-MARCH 1987

CATEGORY	ALLOCATION	EXPENDED	BALANCE
SALARIES			
Campus Coordination Staff	52,000	28,894.31	23,105.69
Long-term Advisors	125,000	11,724.10	113,275.90
Short-term Advisors	7,875	4,907.79	2,967.21
Haiti Staff	68,400	37,286.93	31,113.07
	253,275	82,813.13	170,461.87
FRINGE BENEFITS			
FSU Staff		7,264.26	
Haiti Staff		1,617.12	
	24,406	8,881.38	15,524.62
CONSULTANTS			
International		4,275.00	
Local		8,261.52	
	21,000	12,536.52	8,463.48
ALLOWANCES			
Post Differential	6,750	0.00	6,750.00
Quarters	10,900	0.00	10,900.00
Temporary Lodging	1,200	0.00	1,200.00
Education	5,200	0.00	5,200.00
	24,050	0.00	24,050.00
TRAVEL AND TRANSPORTATION			
U.S./International	38,550	23,981.97	14,568.03
In Haiti	17,200	12,503.09	4,696.91
Household Goods	10,150	0.00	10,150.00
	65,900	36,485.06	29,414.94
MATERIALS AND SUPPLIES			
Office/Technical-Tallahassee		1,054.59	
Office/Technical-Haiti		11,162.25	
School Supplies		8,473.14	
Textbooks		21,499.65	
	56,000	42,189.63	13,810.37

EQUIPMENT			
Vehicles		110,725.04	
Office Furniture/Equip		45,223.66	
School Furniture/Equip		38,120.00	
	203,695	194,068.70	9,626.30
PARTICIPANT TRAINING			
Short-term		0.00	
Inservice Courses		0.00	
Performance Incentive Grants		15,900.00	
	105,000	15,900.00	89,100.00
SUBCONTRACTS			
Protestant Federation	34,110	0.00	
Catholic Commission	34,110	0.00	
CARE/CINEC	276,186	44,089.86	
Institute for Int'l Research	60,892	35,809.41	
	510,298	79,899.27	430,228.73
OTHER DIRECT COSTS			
Tallahassee			
Postage/Shipping/Courier		5,079.02	
Communications		2,938.66	
Printing and Reproduction		1,187.13	
Word Processing		391.80	
DBA Insurance		285.24	
Passport/Visa/Medical		35.00	
Advertising (Recruitment)		1,273.75	
Fees (Banking)		55.37	
Haiti			
Postage/Shipping/Courier		217.80	
Communications		8.22	
Printing and Reproduction		623.18	
Office Rental		9,535.00	
Office Renovations/Maint		8,374.65	
School Renovations		0.00	
Utilities		2,226.10	
Equipment Rental/Maint		1,690.00	
Vehicle/Facilities Insurance		2,365.68	
Legal Services		2,500.00	
Editing/Translation Services		881.00	
Investment Funds/Rev Gen Projs		0.00	
	94,100	39,667.60	54,432.40
OVERHEAD	163,740	56,119.82	107,620.18
TOTAL	1,521,294	568,561.11	952,732.89

ANNEX D

RAPPORT FINANCIER PROBED : FIN JANVIER 1987
IIBE Financial Report: 31 January 1987

veau	Poste	Budget 1986-1987	Dépensé au 31-01-87	Balance	Projection au 31-09-87	Réliquat ou dépassement prévisible	Budget 1987-88	Dépenses prévisibles
	AUTRES FRAIS FONCTIONNEMENT							
	Fournitures bureau CST/CSS	$10,000	$4,000	$6,000				
	Loyer bureau central	$18,000	$6,635	$11,365	$16,785			
	Loyer bureaux régionaux	$8,100	$0	$8,100				
	Eau-éléctricité bur centrl	$8,400	$0	$8,400				
	Eau-éléctricité burx rég	$2,700	$0	$2,700				
	Assurances (véh, bur)	$0	$2,220	($2,220)				
	Téléphone	$1,000	$0	$1,000				
	Poste	$1,000	$0	$1,000				
	Impression/photocopie	$1,500	$600	$900				
	Location equipement	$0	$150	($150)				
	Frais bancaires	$0	$66	($66)				
	Réunions Conseils sect	$2,000	$0	$2,000				
	Honoraires avocat	$0	$2,000	($2,000)				
	Traducteurs - interprètes	$0	$881	($881)				
	Publicité	$0	$814	($814)				
	SOUS-TOTAL/ FONCTIONNEMENT	$589,525	$90,956	$498,569				
	E Q U I P E M E N T							
	VEHICULES							
	Véhicules tout terrain	$60,000	$62,700	($2,700)				
	Camion CARE	$35,000	$31,375	$3,625				
	Motorcyclettes	$9,000	$16,650	($7,650)				
	EQUIPEMENT BUREAU	$68,000	$35,220	$32,780				
	CONSTRUCTION							
	Rénovation bureau	$0	$1,736	($1,736)				
	SOUS-TOTAL/ EQUIPEMENT	$172,000	$147,681	$24,319				
	TOTAL/ NIVEAU CENTRAL	$761,525	$238,637	$522,888				
CARE	Pour memoire	$279,431	$60,000	$219,431				
AMESED	Personnel professionnel	$22,000	$8,969	$13,031	$26,907			
	Personnel de soutien	$30,000	$10,559	$19,441	$31,677			
	Charges sociales	$13,000	$3,867	$9,133	$11,601			
	Fonctionnement bureau	$7,400	$8,438	($1,038)				
	Frais generaux	$178,143	$43,664	$134,479				
	TOTAL/AMESED	$250,543	$75,497	$175,046				
	TOTAL GENERAL	$1,511,499	$458,379	$1,053,120			$2,741,216	

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RAPPORT FINANCIER PROBED : FIN JANVIER 1987
IIEE Financial Report: 31 January 1987

veau	Poste	Budget 1986-1987	Dépensé au 31-01-87	Balance	Projection au 31-09-87	Réliquat ou dépassement prévisible	Budget 1987-88	Dépenses prévisibles	Réliquat dépassement
Niveau local	Formation prof/dir		0						
	Primes prof/dir		$15,900						
	Manuels scolaires		$22,225						
	Matériel didactique		$3,000						
	Fournitures scolaires		$5,000						
	Equipment/mobilier		$38,120						
	Programmes préscolaires		$0						
	Cantine scolaire		$0						
	Rénovation/construction		$0						
	Fonds d'investissement		$0						
	Frais administratifs		$0						
	TOTAL/Niv local	$220,000	$84,245	$135,755	??		$1,280,000	$1,093,750	
Niveau central	F O N C T I O N N E M T								
	PERSONNEL								
	Assistance technique CST	$125,000	$1,150	$123,850	$71,250			$105,000	
	Consultants intnx CST	$26,875	$19,629	$7,246	$45,000				
	Consultants locaux CST	$12,000	$9,062	$2,938	$20,000				
	Moniteurs CST	$9,600	$0	$9,600	$3,000				
	Personnel soutien CST	$34,800	$3,408	$31,392	$27,208			$40,800	
	Personnel techn CSSs	$69,000	$11,365	$57,635	$62,133		$69,000	$87,030	
	Personnel soutien CSS	$26,400	$690	$25,710	$14,090		$26,400	$28,800	
	Moniteurs CSS	$14,400	$1,400	$13,000	$17,700		$36,000	$36,000	
	Charges sociales Ass Tech	$67,750	$0	$67,750	$47,050		$55,000	$42,040	
	Ch soc personnel sout CST	$0	$25	($25)	$2,517		$0	$3,400	
	Ch soc personnel techn CSS	$0	$100	($100)	$5,178		$0	$7,253	
	Ch soc personnel sout CSS	$0	$50	($50)	$2,649		$0	$5,400	
	Formation personnel	$45,000	$0	$45,000	??				
	TRANSPORTS/VOYAGES								
	Voyages interntnx	$14,600	$20,401	($5,801)					
	Per diems	$34,850	inclus	$34,850					
	Transports en Haiti	$20,200	$5,633	$14,567					
	Per diems	$29,700	inclus	$29,700					
	Expédition colis/bagages	$3,300	$357	$2,943					
	Divers (assurances etc.)	$3,350	$320	$3,030					

ANNEX E

RAPPORT FINANCIER PROBED: FIN MARS 1987

Niveau	Poste	Budget concerné 1986-87	Montant prév. 1986-87	Dépensé au 31-03-87	Balance	Dépenses prévues jusqu'en fin Sep 87			Réliquat ou dépassement prévisible
						Au titre 1986-87	Au titre 1987-88	Total cumulatif	
niveau local	APPUI AUX ECOLES								
	Menu PROBED								
	Formation dir/prof	AMESED	$62,500	$0	$62,500	$0	$312,500	$312,500	($250,000)
	Primes dir/prof	AMESED	$37,500	$16,050	$21,450	$16,050	$0	$32,100	$5,400
	Manuels scolaires	AMESED	$37,500	$21,500	$16,000	$0	$107,500	$129,000	($91,500)
	Matériel didactique	AMESED	$6,250	$8,473	($2,223)	$0	$12,500	$20,973	($14,723)
	Fournitures scolaires	AMESED	$6,250	inclus	$6,250	$0	$12,500	$12,500	($6,250)
	Equipement/mobilier	AMESED	$60,000	$38,120	$21,880	$0	$190,000	$228,120	($168,120)
	Programmes préscolaires	AMESED	$0	$0	$0	$0	$0	$0	$0
	Cantine soclaire	AMESED	$0	$0	$0	$0	$0	$0	$0
	Rénovation/construction	AMESED	$0	$0	$0	$20,000	$0	$20,000	($20,000)
	Fonds d'investissement	AMESED	$0	$0	$0	$0	$0	$0	$0
	Frais administratifs	AMESED	$10,000	$0	$10,000	$10,000	$0	$10,000	$0
	TOTAL Menu PROBED		$220,000	$84,143	$135,857	$46,050	$635,000	$765,193	($545,193)
	Fonds PEP	CARE	$179,504	$20,606	$158,898	$50,000	$50,000	$120,606	$58,898
	TOTAL GENERAL NIVEAU LOCAL		$399,504	$104,749	$294,755	$96,050	$685,000	$885,799	($486,295)
Niveau central	FONCTIONNEMENT								
	CENTRE DE SERVICES TECHNIQUES								
	TOTAL Personnel		$295,421	$77,168	$218,253	$175,095	$0	$253,263	$42,158
	TOTAL Transports		$75,300	$36,805	$38,495	$80,000	$0	$116,805	($41,505)
	TOTAL Autres Frais Fonct.		$38,700	$31,209	$7,491	$27,500	$0	$58,709	($20,009)
	TOTAL CST FONCTIONNEMENT		$409,421	$145,182	$264,239	$41,500	$0	$186,682	$222,739
	TOTAL PEP FONCTIONNEMENT	CARE	$73,390	$19,766	$53,624	$20,000	$0	$39,766	$33,624
	CENTRES SECTORIELS								
	TOTAL Personnel		$109,800	$30,896	$78,904	$97,414	$0	$128,310	($18,510)
	TOTAL Transports		$27,000	$0	$27,000	$8,000	$0	$8,000	$19,000
	TOTAL Autres Frais		$12,000	$0	$12,000	$8,600	$0	$8,600	$3,400
	TOTAL CSS FONCTIONNEMENT		$148,800	$30,896	$117,904	$114,014	$0	$144,910	$3,890
	TOTAL GENERAL FONCTIONNEMENT		$631,611	$195,844	$435,767	$175,514	$0	$371,358	$260,253

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RAPPORT FINANCIER PROBED: FIN MARS 1987

	Poste	Budget concerné 1986-87	Montant prévu 1986-87	Dépensé au 31-03-87	Balance	Dépenses prévues jusqu'en fin Sep 87			Réliquat ou dépassement prévisible
						Au titre 1986-87	Au titre 1987-88	Total cumulatif	
	I N V E S T I S S E M E N T								
	CENTRE SERVICES TECHNIQUES								
	Formation personnel	AMESED	$45,000	$0	$45,000	$20,000	$0	$20,000	$25,000
	Véhicules tout terrain	AMESED	$32,000	$35,000	($3,000)	$0	$0	$35,000	($3,000)
	Motorcyclettes	AMESED	$3,000	$3,000	$0	$0	$0	$3,000	$0
	Equipement bureau	AMESED	$68,000	$45,223	$22,777	$5,000	$0	$50,223	$17,777
	Rénovation bureau	AMESED	$0	$8,375	($8,375)	$12,000	$0	$20,375	($20,375)
	TOTAL CST		$148,000	$91,598	$56,402	$37,000	$0	$128,598	$19,402
	PEP (Camion)	AMESED	$35,000	$31,375	$3,625	$0	$0	$31,375	$3,625
	CENTRES SECTORIELS								
	Véhicules tout terrain	AMESED	$35,000	$30,350	$4,650	$0	$0	$30,350	$4,650
	Motorcyclettes	AMESED	$6,000	$6,000	$0	$0	$0	$6,000	$0
	Equipement bureau	AMESED	$0	$0	$0	$0	$0	$0	$0
	TOTAL CSS		$41,000	$36,350	$4,650	$0	$0	$36,350	$4,650
	TOTAL GENERAL INVESTISSMT		$224,000	$159,323	$64,677	$37,000	$0	$196,323	$27,677
	TOTAL GENERAL NIVEAU CENTRAL		$855,611	$355,167	$500,444	$212,514	$0	$567,681	$287,930
Organsa de tutelle	AMESED								
	Personnel professionnel	AMESED	$22,000	$12,523	$9,477	$11,355	$0	$23,878	($1,878)
	Personnel de soutien	AMESED	$30,000	$16,371	$13,629	$18,780	$0	$35,151	($5,151)
	Charges sociales	AMESED	$13,000	$3,632	$9,368	$2,309	$0	$5,941	$7,059
	Fonctionnement bureau	AMESED	$7,400	$12,110	($4,710)	$12,000	$0	$24,110	($16,710)
	Frais généraux	AMESED	$171,091	$56,120	$114,971	$122,293	$0	$178,413	($7,322)
	TOTAL AMESED		$243,491	$100,756	$142,735	$166,737	$0	$267,493	($24,002)
	CARE (Frais généraux)	CARE	$23,292	$3,718	$19,574	$15,000	$0	$18,718	$4,574
	TOTAL GENERAL ORGANSIMES TUT		$266,783	$104,474	$162,309	$181,737	$0	$286,211	($19,428)
	T O T A L G E N E R A L PROBED		$1,521,898	$564,390	$957,508	$490,301	$685,000	$1,739,691	($217,793)

SALARIES

Campus Coordination Staff		
Coordinator	09/05/86-03/31/87	12,523.32
Fiscal Assistant	11/14/86-03/31/87	2,139.60
Secretary	10/03/86-03/31/87	6,024.45
Graduate Assistants	10/05/86-03/31/87	5,462.00
Clerical Support	10/06/86-03/31/87	2,744.94
		28,894.31
Long-Term Advisors		
Jean Moisset		0.00
Antoine Lewy	01/14/87-03/31/87	6,321.82
Maryse Roumain	01/26/87-03/31/87	5,402.28
		11,724.10
Short-Term Advisors		
Easton, Peter	01/09/87-03/31/87	4,907.79
Haiti Staff		
Technical Services Center		
Administrative Assistant	03/16/87-03/31/87	689.66
Chief Accountant		0.00
Executive Secretary	03/23/87-03/31/87	193.10
Secretary/Word Proc Opr	10/14/86-03/31/87	3,382.90
Dispatcher/Warehouse Supv		0.00
Research Assistants		0.00
Drivers	10/14/86-03/31/87	1,322.30
Custodians/Watchmen	01/14/87-03/31/87	1,161.88
Protestant Services Center		
Director	11/10/86-03/31/87	6,637.90
Curriculum/Teacher Tng Spec	01/15/87-03/31/87	2,358.66
Educ Admin/Commun Dev Spec	01/15/87-03/31/87	2,358.66
Testing/Evaluation Spec	01/19/87-03/31/87	1,137.70
Secretary	01/19/87-03/31/87	1,137.95
Driver	01/19/87-03/31/87	632.31
Regional Monitor	10/01/86-03/31/87	1,213.78
Catholic Services Center		
Director	11/17/86-03/31/87	6,375.41
Curriculum/Teacher Tng Spec	01/15/87-03/31/87	2,358.66
Educ Admin/Commun Dev Spec	01/15/87-03/31/87	2,358.66
Testing/Evaluation Spec	01/19/87-03/31/87	1,137.69
Secretary	01/15/87-03/31/87	1,179.58
Driver	01/19/87-03/31/87	632.31
Regional Monitor	11/03/86-03/31/86	1,017.82
		37,286.93
	Subtotal Salaries:	82,813.13

CONSULTANTS

International			
Simon Fass	11/20/86-12/12/86	19 days @ $225	4,275.00
Local			
Antoine Levy	10/08/86-01/13/87	66 days @ $100	6,600.00
Delille Antoine	10/20/86-11/15/86	24 days @ $69.23	1,661.52
			8,261.52
		Subtotal Consultants:	12,536.52

TRAVEL

U.S./International			
Easton, Peter	09/21/86-10/15/86	Haiti	2,298.57
McLanahan, John	10/26/86-11/01/86	Haiti	903.62
Easton, Peter	10/26/86 11/04/86	Haiti	1,139.62
Fass, Peter	11/22/86-12/12/86	Haiti	2,257.00
McLanahan, John	11/23/86-11/29/86	Haiti	939.50
Easton, Peter	11/24/86-12/14/86	Haiti	1,974.18
Roumain, M.	12/02/86-12/07/86	Haiti	827.00
Jocelyn, P.	12/05/86-12/09/86	Haiti	978.35
Toussaint, P.	12/06/86-12/09/86	Haiti	1,054.85
McLanahan, John	01/07/87-01/15/87	Haiti	1,243.00
Easton, Peter	01/13/87-01/31/87	Haiti	2,290.87
Moisset, Jean	01/17/87-01/21/87	Haiti	1,147.48
McLanahan, John	02/15/87-02/20/87	Haiti	916.89
Easton, Peter	02/17/87-02/25/87	Haiti	1,156.40
McLanahan, John	03/04/87-03/11/87	Haiti	1,218.75
Easton, Peter	03/08/87-03/14/87	Haiti	1,002.50
Moisset, Jean	03/08/87-03/15/87	Haiti	1,500.00
McLanahan, John	03/18/87-03/25/87	Haiti	1,133.39
			23,981.97
In Haiti			
Transportation/Vehicle Rental			8,732.65
Project Vehicles-Gas/Oil/Maintenance			1,696.69
Personnel Subsistence			2,073.75
			12,503.09
		Subtotal Travel:	36,485.06

CARE/CINEC

Salaries	
Coordinator	2,658.23
Assistant Coordinator	2,374.40
Education Specialist	2,205.60
Field Assistants	3,328.00
Executive Secretary	1,243.42
Drivers/Inspectors/Laborers	2,690.46
	14,500.11
Fringe Benefits	1,813.02
Travel	
Transportation - Gas/Oil/Maintenance	2,641.15
	771.94
	3,413.09
Materials and Supplies	20,606.41
Other Direct	
Courier	39.00
Overhead	3,718.23
TOTAL:	**$44,089.86**

IIR SUBCONTRACT

Salaries		
Short-Term Advisors		
Anzalone, Steve	19 days	2,901.23
Pigozzi, Mary	54 days	9,198.18
		12,099.41
	Accrued Leave	1,209.94
		13,309.35
Fringe Benefits		3,914.27

Travel			
Anzalone, Steve	09/15/86-10/03/86	Haiti	2,202.50
Pigozzi, Mary	09/22/86-10/10/86	Haiti	2,396.29
Pigozzi, Mary	12/01/86-12/13/86	Haiti	1,369.50
Pigozzi, Mary	01/18/87-01/31/87	Haiti	1,494.00
			7,462.29

Materials		48.25
Other Direct		
Communications		470.66
Overhead		4,555.64
G&A		3,390.40
Fee		2,652.55
	TOTAL:	$35,809.41

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ANNEX F

Document de travail

PROPOSITION D'UN SYSTEME DE RAPPORTS POUR LE P.R.O.B.E.D.

1. PRINCIPES

1.1 Un système de rapports suppose un système de planification et de programmation. Le rapport sert à rendre compte de l'exécution du plan de travail au cours de la période en question, et à faire ressortir les modifications qu'il faudrait apporter aux méthodes d'intervention ou d'organisation du travail à l'avenir.

1.2 Le rapport comprend un compte rendu des activités (y compris l'analyse des résultats obtenus, dans la mesure où il est déjà possible de les déterminer) ainsi qu'un rapport financier qui permet d'apprécier le coût de ces activités.

1.3 On peut distinguer les rapports périodiques exigés par les différents contrats qui nous lient d'une part, des rapports courants à usage interne dont nous nous servons pour le suivi et la programmation de notre travail de l'autre. L'objectif toutefois, est de faire en sorte que ces deux types de documents soient articulés l'un sur l'autre et se complètent avec un minimum de redondance.

1.4 On doit essayer de limiter autant que possible la complexité et le volume des rapports pour éviter qu'on ne s'enlise dans la papérasse et les procédures bureaucratiques. Ceci dit, un bon système de rapports a plusieurs vertus qu'il ne faudrait pas sacrifier. Il permet en effet

- de prendre note à une périodicité régulière des activités entreprises, des résultats obtenus et des problèmes recontrés;
- de réfléchir à ce bilan pour prévoir à temps les mesures correctives à prendre et/ou les modifications à introduire dans la méthodologie d'intervention du projet; et
- d'assurer l'information réciproque de tous les partenaires concernés.

2. PLANIFICATION ET PROGRAMMATION

2.1 Celles-ci doivent se concrétiser dans des plans de travail couvrant diverses périodes:

2.1.1. **Plan de travail pluriannuel** qui est représenté à

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l'heure actuelle par le document du projet. Ce document est cependant à reprendre et à actualiser.

2.1.2. **Plan de travail annuel**

2.1.3. **Plan de travail trimestriel**

2.1.4. **Plan de travail mensuel**

2.1.5. **Ordre de mission/termes de référence** qui constituent en quelque sorte le plan de travail pour des activités spécifiques et ponctuelles.

Il est évident que ces documents doivent "s'emboîter" les uns dans les autres, le plan trimestriel constituant par exemple, une amplification et une révision de ce qui est déjà prévu au niveau du plan annuel.

2.2. Schéma d'un plan de travail. Nous avons intérêt à standardiser un peu le format et le contenu des plans de travail, ceci pour simplifier leur préparation et leur utilisation comme instruments de suivi. Je propose à titre purement indicatif le schéma suivant:

2.2.1. Objectifs

a/ **Rappel des objectifs globaux** pour le période en cours: Ainsi dans un plan annuel on rappelle les objectifs pluriannuels du projet, dans le plan trimestriel on rappelle les objectifs annuels, etc. -- de façon à assurer que les activités prévues au cours de la période en question contribuent à la réalisation des objectifs globaux du projet.

b/ **Définition des objectifs opérationnels** pour la période en question. Ceux-ci doivent être aussi précis que possible, chiffres à l'appui là oucela est approprié.

2.2.2. **Méthodes** -- Comment s'y prendre pour réaliser les objectifs ainsi définis? Sous la rubrique méthodes il s'agit donc de résumer succinctement ces approches.

2.2.3. **Moyens humains, matériels et financiers** -- De quels moyens (personnel, équipment, fonds) aura-t-on besoins pour faire ce travail? Les ressources nécessaires au déroulement des activités sont à prévoir sous cette rubrique.

Il s'agit de définir ces trois volets pour chacun des domaines d'activité du projet, ceux-ci pouvant être représentés sous la forme des dix catégories que nous avons élaborées ensemble au mois de janvier: Direction/planification, programmation/méthodologie, recrutement et formation du personnel, etc. Cette partie du plan de travail pourrait donc avoir plus ou moins la forme d'un tableau où les volets "objectifs, méthodes, moyens" apparaîssent en haut sur l'axe horizontal, alors que les différents domaines figurent à gauche sur l'axe vertical, comme suit:

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Domaines d'activité	OBJECTIFS	METHODES	MOYENS
Direction/planification			
(Conseil d'adm)			
(FEPH ou CEEC)			
Programmation/méthodologie			
Macro: stratégie d'ext			
Micro: approche pédagog.			
Personnel			
Recrutement			
Formation			
Administration/management			
Gestion du personnel			
Organisation des bureaux			
Coordination interne			
Equipement/approvisionnement			
Equipement des bureaux			
Construction/rénovation des locaux			
Achat, stockage et livraison du matér.			
Budget/gestion financière			
Coordination externe			
Rapports avec USAID, Min Ed, autres			
Relations publiques			
Suivi et évaluation			
Recherche et études			
Appui au terrain			
Prospection écoles			
Diagnostic écoles			
Formation prof/dir			
Livraison matériel			
Animation structures locales			
Activités génér. de revenu			
Suivi et auto-éval.			
Divers			

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Il est à noter que ce même type de schéma peut servir également à la planification d'activités spécifiques et ponctuelles dans la mesure où y sont évoqués tous les aspects de la mise en oeuvre d'une activité auxquels il faut penser lors de la prévision du travail. Quoiqu'il en soit, une fois ce schéma détaillé, on peut en déduire deux autres types de prévisions qui doivent fiare partie du plan de travail, à savoir:

2.2.4. **Implications budgétaires**

2.2.5. **Calendrier prévisionnel des opérations** (sorties, séminaires, réunions, livraisons, processus de productions, etc.)

3. ETABLISSEMENT DES RAPPORTS

3.1. Types de rapport -- Les plans de travail sont évidemment établis en début de période. Les rapports inteviennent par contre en fin de période et servent à faire le point du degré de réalisation du plan de travail, des problèmes rencontrés, des solutions trouvées ou proposées, etc. Alord que la planification procède en quelque sorte "de haut en bas" (partant de la planification d'ensemble on élabore des plans annuels, puis trimestriels, etc.), la démarche pour l'établissement des rapports est évidemmment l'inverse: on part des rapports d'activités ponctuelles (sorties, séminaires, réunions) pour élaborer des rapports récaputlatifs ou de synthèse couvrant des périodes plus longues. On peut distinguer quatre échelons dans l'établissement des rapports:

3.1.1. **Rapports d'activité** qui portent sur une intervention précise et ponctuelle, tels

- o rapports de tournée
- o rapports de mission des consultants
- o rapports de séminaire
- o compte rendus ou procès verbaux des réunions

Chaque activité de ce type doit donner lieu à un rapport ou compte rendu, ne serait-ce qu'une seule page remplie comme un formulaire.

3.1.2. **Rapports mensuels** qui résument les activités entreprises au cours du mois passé, partant des rapports d'activité évoqués ci-dessus, et qui prennent note des problèmes rencontrés dans l'exécution du plan de travail.

3.1.3. **Rapports trimestriels** qui représentent la synthèse des rapports mensuels. A ce niveau, il s'agit de prendre un peu de recul par rapport aux activités pour réfléchir au degré de mise en oeuvre du plan de travail et aux modifications qu'il faudrait apporter à la méthodologie d'organisation du projet ou d'intervention sur le terrain. Dans la mesure où le détail des activités est déjà bien notées dans les rapports mensuels, les rapports trimestriels n'auront pas à revenir là-dessus.

3.1.4. **Rapports annuels** qui constituent la synthèse des rapports trimestriels et servent à établir le bilan des résultats obtenus au cours de l'année. C'est en même temps l'occasion de tirer des conclusions concernant l'organisation, la méthodologie et le budget du projet et de proposer des remaniements.

3.2. Schéma des rapports. Reste à définir. Cependant, il est évident que le rapport reprendra en partie le schéma du plan de travail correspondant, dans la mesure ou il s'agit de rendre compte de sa mise en oeuvre. Ceci dit, il peut bien arriver des choses non-prévues dans le plan et en tout état de cause, une partie du rapport doit être consacrée à l'analyse du bilan établi.

3.3. Soumission et distribution/ventilation des rapports. On peut distinguer trois types d'organismes qui travaillent au PROBED à l'heure actuelle: les unités techniques (CSSC, CSSP, CST-PEP); les organismes de direction (FEPH, CEFC, CA); et les organismes de financement et de tutelle (USAID, AMESED, CARE). Les derniers sont appelés à se faire remplacer progressivement par les seconds, mais ils jouent en attendant un rôle essentiel.

Il existe des obligations contractuelles entre les organismes de direction et les organismes de tutelle, ainsi que parmi ceux-ci. La soumission de rapports trimestriels et annuels fait partie de ces obligations. Mais comme cela a été noté plus haut, les rapports servent d'autres fins aussi, et ils n'intéressent pas que les partenaires contractuels auxquels ils doivent être soumis. De façon générale, nous avons intérêt à promouvoir un bon système de circulation des informations, pour que les différentes unités concernées par le projet restent au courant de l'ensemble des activités.

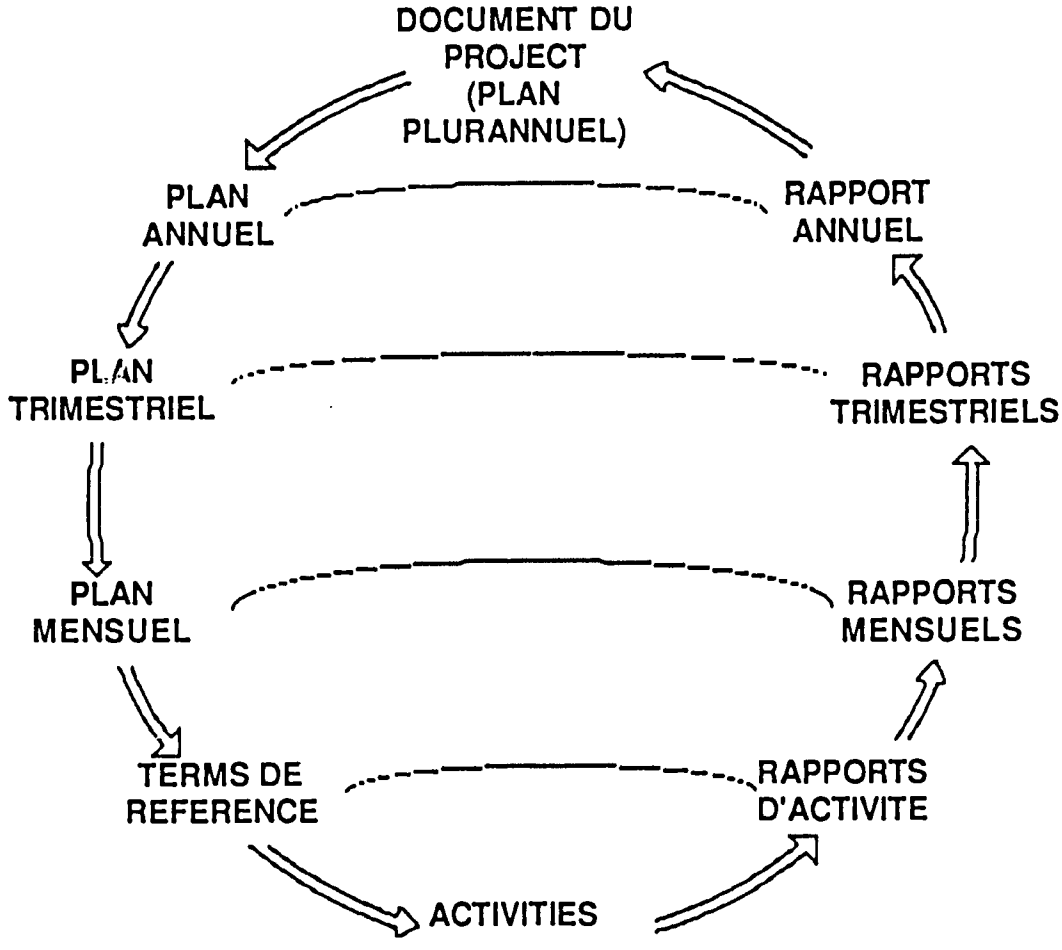
A partir de ces quelques remarques, on peut envisager un schéma de soumission et de distribution des différents types de rapports qui se présenterait à peu près comme suit:

TYPE DE RAPPORT	REDIGE PAR	SOUMIS A(U) (X)	DISTRIBUE A(U) (X)
Rapports d'activité	Participants	Direction unité technique	Autres unités techniques
Rapports mensuels	Direction unité techn.	Direction organ. de direction	Autres organismes de direction
Rapports trimestr	Direction org. de direction	Direction organ. de tutelle	Tout le monde
Rapports annuels	Direction org. de direction	Direction organ. de tutelle	Tout le monde

4. ARTICULATION DE LA PLANIFICATION AVEC L'ETABLISSEMENT DES RAPPORTS

4.1. Etant donné que la fin d'une période marque également le début d'une autre, il s'ensuit que les rapports de fin de période devraient comporter une section concernant la prévision des activités pour la période suivante.

4.2. On s'aperçoit ainsi que la planificaiton et l'établissement des rapports font partie en fait d'un seul processus "cyclique" ou "en spirale" qui se renouvelle continuellement et doit permettre à chaque tour d'améliorer le fonctionnement du projet. Ce cycle peut être représenté de la façon suivante:



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