

A.I.D. EVALUATION SUMMARY PART I

(BEFORE FILLING OUT THIS FORM, READ THE ATTACHED INSTRUCTIONS)

15/1/89

A. REPORTING A.I.D. UNIT:

USAID/Jamaica
(Mission or AID/W Office)

(ES# 89-2)

B. WAS EVALUATION SCHEDULED IN CURRENT FY ANNUAL EVALUATION PLAN?

yes slipped ad hoc

Eval. Plan Submission Date: FY 89 Q 1

C. EVALUATION TIMING

Interim final ex post other

PD-117-242
XLS

D. ACTIVITY OR ACTIVITIES EVALUATED (List the following information for project(s) or program(s) evaluated; if not applicable, list title and date of the evaluation report)

Project #	Project/Program Title (or title & date of evaluation report)	First PROAG or equivalent (FY)	Most recent PACD (mo/yr)	Planned LOP Cost ('000)	Amount Obligated to Date ('000)
532-0083	An Evaluation of the Basic Skills Training Project January 10, 1989	8/1/83	8/89	13,400	12,450

E. ACTION DECISIONS APPROVED BY MISSION OR AID/W OFFICE DIRECTOR

Action(s) Required	Name of officer responsible for Action	Date Action to be Completed
- Extension of PACD (Pending receipt of new Implementation Plan)	MOE/USAID	June 1989
- Implementing one fully coordinated MIS to meet formal/non-formal skills training needs	HEART/MOE	Dec. 1990
- Coordinating data collection to ensure accurate reporting of trainee information	HEART/MOE	Oct. 1990
- Improving counselling and placement functions	HEART/MOE	Dec. 1989
- Implementing trainee performance testing program	HEART/MOE	Dec. 1989
- Validating existing curricula used in non-formal skills training	HEART/MOE	Dec. 1989
- Full establishment of private sector advisory committees	MOE	Oct. 1989
- Conducting targeted tracer studies	HEART/MOE	June 1990
- Ordering equipment for technical high schools	MOE/USAID	Mar. 1990
- Support policy studies for the GOJ/MOE	MOE/USAID	Dec. 1989

See Section "L" for detailed implementation actions

(Attach extra sheet if necessary)

F. DATE OF MISSION OR AID/W OFFICE REVIEW OF EVALUATION: mo 2 day 28 yr 89

G. APPROVALS OF EVALUATION SUMMARY AND ACTION DECISIONS:

<p>Project/Program Officer <i>[Signature]</i> W. Charleson Director, OEHR Date: <u>6/1/89</u></p>	<p>Representative of Borrower/Grantee <i>[Signature]</i> Cecil Turner Permanent Sec. Min. of Educ. Date: <u>6/2/89</u></p>	<p>Evaluation Officer <i>[Signature]</i> Ruby Baker OPEP/USAID Date: <u>hale</u></p>	<p>Mission or AID/W Office Director <i>[Signature]</i> Myron Golden Actg Mission Director Date: <u>7/6/89</u></p>
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H. EVALUATION ABSTRACT (do not exceed the space provided)

The purpose of the Basic Skills Training Project is to assist the Government of Jamaica (GOJ) to establish an improved skill training system responsive to the GOJ's economic policies and labor market needs. The evaluation was to determine if the skill training system assisted through the project was responsive to the GOJ's economic policies and labor market needs. Major findings and conclusions were: the project supported a supply-side approach to human resource development and, private-sector input was limited to advisory committees or boards; project inputs were skewed in favor of support for operational activities in the H.E.A.R.T. Trust; the original project design was based on some questionable assumptions or expectations; the importance attached to the role of coordination, as opposed to, say, instructor salaries, was debatable; it was unrealistic to believe that an oversight coordinative authority could be imposed on the existing bureaucracy; insufficient consideration may have been given to the difficulty of trying to implement a project of this complexity within a five-year period.

Lessons Learned

The project design failed to anticipate a number of implementation problems and therefore attempted too much too soon. Therefore future projects of this nature should be introduced with a phased, experimental approach and greater consideration of the absorptive capacity of participating agencies; a large knowledge-development component including controlled experimentation; increased involvement of the private sector as participating partners; separate project funding for participating agencies; and greater use of subcontracting among public agencies.

It was recommended that no substantive changes be made to the project but that the PACD be extended to enable completion of certain critical project activities.

ABSTRACT

I. EVALUATION COSTS

1. Evaluation Team

Name	Affiliation	Contract Number <u>QB</u> TDY Person Days	Contract Cost <u>QB</u> TDY Cost (US\$)	Source of Funds
Dr. Terrence Kelly	Education	PDC-1109-1-01-7118	\$24,392.94	PD & S
Dr. Larry Kenneke	Development Center	Work Order No.3		

2. Mission/Office Professional
Staff Person-Days (estimate) 11 days

3. Borrower/Grantee Professional
Staff Person-Days (estimate) 22 days

COSTS

A.I.D. EVALUATION SUMMARY PART II

J. SUMMARY OF EVALUATION FINDINGS, CONCLUSIONS AND RECOMMENDATIONS (Try not to exceed the 3 pages provided)

Address the following items:

- Purpose of activity(ies) evaluated
- Purpose of evaluation and Methodology used
- Findings and conclusions (relate to questions)
- Principal recommendations
- Lessons learned

Mission or Office: Education & Human Resources

Date this summary prepared: 2/20/89

Title and Date of Full Evaluation Report: Evaluation of the Basic Skills Training Project

PURPOSE AND METHODOLOGY

The purpose of the Basic Skills Training Project is to assist the Government of Jamaica (GOJ) to establish an improved skill training system responsive to the GOJ's economic policies and labor market needs.

The purpose of the evaluation was to determine if the skill training system assisted through the project was responsive to the GOJ's economic policies and labor market needs. The evaluation was carried out by a two-person team representing the Education Development Center. The team reviewed major project documents and files, interviewed USAID staff, RCA/GE staff, government officials, and entrepreneurs in Kingston; faculty, students and administrators of H.E.A.R.T. academies at Portmore, Garmex, Kenilworth, and Stony Hill; and Vere, Dunoon, Marcus Garvey, and Herbert Morrison Technical High School faculty, students, and administrators at their respective locations.

FINDINGS AND CONCLUSIONS

The Basic Skills Training Project was structured to improve the skills upgrading environment in Jamaica, and particularly its non-formal component. The project budget was US\$63 million. U.S. AID inputs covered technical assistance, upgrading of facilities, equipment, instructor training, and participant training. The project supported a centralized, coordinative approach to skills upgrading; i.e., a supply-side approach. Private-sector input was limited to advisory committees or boards. Although one of the primary project objectives was institution building -- the H.E.A.R.T. Trust -- project inputs were skewed in favor of support for operational activities.

In retrospect, the original project design was based on some questionable assumptions or expectations. It was unrealistic to believe that an oversight coordinative authority could be imposed on the existing bureaucracy. Insufficient consideration may have been given to the difficulty of trying to implement a project of this complexity within a five-year period.

The project was structured to involve three separate Government agencies: the Ministry of Youth and Community Development (MYCD), the Ministry of Education (MOE), and the H.E.A.R.T. Trust as the coordinator and monitor of other GOJ activities. Due to lack of clarity of lines of authority, the structure did not function in its intended form.

Moreover, the project environment was significantly changed with H.E.A.R.T.'s assumption of direct operating responsibility for academies. H.E.A.R.T. is now primarily an operating institution. Planning, evaluating and coordinating activities have been subordinated to operating concerns.

Implementation problems occurred. They have likely had less impact on project outcomes than had the change in H.E.A.R.T. focus from coordination to operation.

Project outcomes, have been significant and generally positive, even though different from what was initially anticipated. The most important accomplishment of the project has been to galvanize public attention for the skill upgrading issue.

H.E.A.R.T. non-formal training system has been put under the Office of the Prime Minister and is being used as a component of policy to attract foreign investment and increase exports.

It is questionable whether an organization designed to promote the image of Jamaican labor can be enticed to evaluate the progress of its own programs to further upgrade that labor.

Much of AID input has been specialized, governed by the objective of supporting foreign exchange expenditures. It is difficult to reorient these sorts of specialized investments, and the question must be faced, what happens when evaluations show that operations should be changed? It is difficult to transform sewing machines into electronic circuit boards. Too much emphasis on monitoring, without provision for change, is misplaced. It is noted that project inputs have assisted Jamaica along a particular, fairly costly path for skills development.

H.E.A.R.T. academies are models, and project inputs are in evidence. The Ministry of Education has benefited from technical inputs because their initial resource base was so low.

The final impact of the project inputs in terms of facilitating skills upgrading, increased employment, and improved development prospects, cannot be determined with sufficient reliability, due to a lack of data. In view of original project objectives, this was a dismaying surprise. On the other hand, data from the early stage of operations are not particularly reliable either.

A pilot tracer study was carried out. Results show that employment among graduates was higher, at 52 percent, than original design expectations, but that very few graduates of H.E.A.R.T. academies were working in the fields for which they were trained.

Available cost data are not appropriate for analysis because of an inability to make clear distinctions between capital and operating costs and to separate out the cost of H.E.A.R.T. headquarters functions in direct support of academy functions. Data show low direct operating costs for academies, but high costs for the H.E.A.R.T. operation as a whole. It is noted that even if academies were operated at perfect efficiency, the operation would be costly as a result of its residential remedial components, its high-profile, "showpiece" nature, and its high capital base. Even so, recurrent costs per trainee in H.E.A.R.T. academies are over four times as high as those per student in technical high schools under the Ministry of Education.

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The central finding of the evaluation, therefore, is that the project did not generate the outputs originally desired -- coordination, evaluation, management data, analysis, etc. -- but it generated other beneficial outcomes -- improved funding for non-formal skills training, a highly visible organization linking skills upgrading with development policy, and an apparently improved operating system for institutions. It is not yet an institutional system, as intended, but it is a solid base for that system.

None of this is new to AID, as most of the above has been discussed during two previous internal evaluations. That the recommendations of those evaluations have not been fully implemented might have been due to USAID ambivalence concerning the value of operations versus evaluations.

The evaluation team believes that a sound operating framework is a necessary precondition for the development of a skill-upgrading system. Operations are the cornerstone of any vocational education or training system.

RECOMMENDATIONS

It is recommended that the project be extended for an additional year, in large part for administrative reasons. Certain participant training had to be postponed due to a delay in the disbursement of funds from USAID. That commitment cannot be fulfilled in the remaining months of the current project. It is assumed that the additional time would be used to implement some of the evaluation activities contemplated in the original project design; a tracer study of program graduates with a control group, cost data in a form suitable for analysis, employer opinion surveys, and surveys on private-sector training activities. Such activities need not await the full development of a management information system but can be implemented independently. They would assist in the improvement of internal operations, apart from their contribution to system design and coordination.

Beyond this, a longer term USAID commitment for future project activity should be envisioned. Five years on a project of this complexity is too short to do anything but to raise expectations. It seems likely, however, that the following issues will emerge:

- How to induce greater private-sector participation in the provision of training.
- How better to select students or trainees.
- How to introduce flexibility into what is turning out to be a hard-to-reorient institutional framework.
- How to introduce flexible entry-exit standards in the absence of specialized proficiency tests. How to accelerate the introduction of such tests.
- How to address the fundamental question of attracting and retaining qualified instructors and administrators.

Evaluations can assist in answering some of the above, or other questions raised in the main body of the report. Mindful that previous investments represent sunk costs further investment requirement will cost on the order of one-third less as a result of funding to date. Moreover, returns on past investments will fail to be realized should project funding drop off significantly.

Lessons Learned

The project design failed to anticipate a number of implementation problems and therefore attempted too much too soon. Therefore future projects of this nature should be introduced with:

- a phased, experimental approach;
 - greater consideration of the absorptive capacity of participating agencies;
 - a large knowledge-development component; including controlled experimentation;
 - increased involvement of the private sector as participating partners;
 - separate project funding for participating agencies; and
 - greater use of subcontracting among public agencies.
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K. ATTACHMENTS (List attachments submitted with this Evaluation Summary; always attach copy of full evaluation report, even if one was submitted earlier)

Full Evaluation Report
 Review of the Ministry of Education Component
 Review of the Ministry of Youth & Community Development
 Review of the H.E.A.R.T. Trust
 Summary of the Ministry of Education Cost Data
 Summary of the Ministry of Youth & Community Development Cost Data
 Summary of the H.E.A.R.T. Trust Cost Data

L. COMMENTS BY MISSION, AID/W OFFICE AND BORROWER/GRANTEE

The Mission believes that the evaluation findings and recommendations have merit, although we do not fully accept that the assumption by H.E.A.R.T. of operational responsibility was an acceptable substitute for having institutionalized a more effective skill training system in Jamaica. True, the H.E.A.R.T. academies are show places, they do train workers and they probably have had a positive impact on the development of export industries. But it is also true that costs appear to be excessive, that much of what is going on is remedial in nature and that, consequently, more cost effective solutions for providing skill training involving in-plant training and the private sector must be sought.

Under the new government, the coordination of all skill training activities has been vested in the MOE. It is reviewing H.E.A.R.T. activities and we expect policy changes to result. Pending the outcome of policy decisions, the Mission believes that:

- (1) it should extend the PACD from August 1, 1989 to December 31, 1990
- (2) a limited amount of project TA funds should be used to assist the MOE to complete its policy analysis;
- (3) it should support the continuation of project activities that will produce needed information/systems regardless of where the operational responsibility for skills training resides (e.g., H.E.A.R.T. or the MOE). These activities are:
 - Implementing one fully coordinated MIS to meet formal/non-formal skills training needs
 - Coordinating data collection to ensure accurate reporting of trainee information
 - Improving counselling and placement functions
 - Implementing trainee performance testing program
 - Validating existing curricula used in non-formal skills training
 - Full establishment of private sector advisory councils
 - Conducting targeted tracer studies
 - Ordering Equipment for Technical High Schools

ATTACHMENTS

MISSION COMMENTS ON FULL REPORT

The following actions will be taken to achieve these activities:

Continued technical assistance will be used to identify and adapt data base requirements to a format for use by technical schools. Computer equipment will be ordered and participant training in the use of equipment will be conducted for both the Ministry of Education and the H.E.A.R.T. Trust.

Technical Consultants will also work to interface the Management Information System (MIS) at the MOE with the MIS at H.E.A.R.T. so that both systems will be compatible and co-ordinated.

The job of staff trained under the above activity will be to co-ordinate data collection for both systems among other things.

Work statements have been prepared for consultants to set up counselling and placement functions and performance testing programs. The counterparts for these consultants will be trained by them to perform these functions on a continuing basis.

Some twenty-five curricula have already been prepared. However, technical assistance will be employed in an accreditation process for these curricula by field testing them and arranging for private sector committees in each of the different skills to validate curricula.

Technical Assistance have already identified the Private Sector Advisory Councils for the technical schools. The Ministry of Education will authorize establishment of these councils formally.

Technical Assistance has been employed in the MOE to initiate Tracer Studies and train staff in the technical schools to do studies on a continuing basis. It is planned that this methodology will be adapted for the H.E.A.R.T. academies.

A new PSA has been contracted to continue procurement of equipment for the technical high schools.

The terms of reference and a work statement has been prepared to conduct policy studies to recommend policy options in relation to (a) rationalisation of formal and non-formal technical/vocational education and training, and (b) responsibilities and operations of a National Manpower Training Board. It is estimated that these studies will be completed in 1989.

USAID plans to conduct an internal review in July 1990 to assess achievement for the purposes of a possible follow-on project.

SUMMARY OF MINISTRY OF EDUCATION COST DATA

Technical Assistance

A total of 59.75 person months of short-term technical assistance have been provided to the Ministry of Education (MOE) component of the BSTP (See Table I). The cost of all technical assistance charged to the MOE (59.75 person months) is US\$745,990 (excluding home office, G & A, and fixed fee costs). Approximately twenty-four (24) person months of technical assistance remain to be used.

Of the 59.75 person months of technical assistance provided to the MOE, 0.34 person months have not been implemented. As the estimated average cost of local technical consultants is US\$3,300 per person month, this "lost time" represents a financial loss of approximately US\$ 1,100 (or approximately 0.14%) to the project. (For further details on the amount of technical assistance provided in particular areas, see Table I.)

Participant Training

Table II summarizes the overseas training provided to MOE, C.A.S.T. and Technical High School staff. A total of 9.25 person months of short-term training and 48 person months of long-term training (i.e., 57.25 person months in all) have been provided to project staff on the MOE component of the BSTP. Of the eighteen (18) participants, one individual (representing 0.5 person months) has retired from MOE since receiving training. At an average rate of US\$2,648 per person month of training, the departure of this individual from the project represents a loss of approximately US\$1,324 (or 0.87 of the total participant training expenditure).

Equipment

Funds in the amount of US\$900,000 were budgeted for innovative equipment for the MOE component of the project.

Of this total, US\$570,773 have been spent. (For information regarding expenditures for particular institutions within MOE, see Table III.) According to the Assistant Chief Education Officer in charge of this project at MOE, there have been no major problems in the delivery of equipment. Early on, equipment arrived which did not meet specifications, but these items have been replaced. Other missing and non-working items have either been replaced (and their replacements covered by insurance), or received in subsequent shipments.

IMPLEMENTATION STATUS OF
TECHNICAL ASSISTANCE TO THE MINISTRY OF EDUCATION

- page 2 -

<u>Person Months Completed</u>	<u>Name of Consultant</u> <u>Description of Services/Work Products</u>	<u>Implementation Status</u>
<u>CURRICULUM</u> (Total time allocated: 15 person months)		
8.3	J. LYNCH - Automotive Curriculum Writer	Implemented
3.5	E. I. WHITE - Home Economics/Food Preservation Curriculum Development	Implemented
3.5	F. SAMUELS - Home Economics/Fashion Design Curriculum Development	Implemented
2.65	M. J. GRIEVE - Curriculum Implementation And Evaluation Specialist	Implemented - To be continued
<u>17.95</u>		

MATERIALS DEVELOPMENT (Total time allocated: 15 person months)

4.4	A. ALEXANDER - Management Specialist	Implemented (Incomplete - due to consultant illness)
3.5	H. HALL - Home Economics	Implemented
4.0	H. MORRISON - Entrepreneurship	Implemented
<u>11.9</u>		

PROJECT DEVELOPMENT (Total time allocated: 12 person months)

UNUSED TECHNICAL ASSISTANCE:

6.0	CONSULTANT TO BE ANNOUNCED - Work Experience, Placement, and Tracer Study Specialist
6.0	CONSULTANT TO BE ANNOUNCED - Vocational/Technical Program Standards and Evaluation Specialist

IMPLEMENTATION STATUS OF
TECHNICAL ASSISTANCE TO THE MINISTRY OF EDUCATION

<u>Person Months Completed</u>	<u>Name of Consultant Description of Services/Work Products</u>	<u>Implementation Status</u>
<u>TEACHER TRAINING</u> (Total time allocated: 18 person months)		
0.5	L. DeBARTOLIS - Seminar Leader	Implemented
1.0	L. DENNY - Seminar Leader	Implemented
1.0	B. FRANCIS - Seminar Leader	Implemented
0.7	B. FRANCIS - Administration & Management Specialist; Admin. of In-service Education	Implemented
0.5	A. NELSON - Seminar Leader	Implemented
1.8	F. JOHNSTON - Instructor Training Specialist	Implemented
0.34	N. YING - Advisory Committee Specialist	Not Implemented
0.9	R. KNOTTS/L. COMBS - Workshop Instructors	Implemented
8.2	SEMINAR LEADERS: M. AMRITT C. BROWN S. DUNCAN J. SMITH Q. NEMBHARD G. GAYLE	Implemented
3.0	R. A. PEYNADO - Specialist in Construction; Instructor in summer courses, to strengthen technical teacher training program at C.A.S.T.	Implemented
3.0	M. RICHARDSON - Specialist in Construction; Instructor in summer courses, to strengthen technical teacher training program at C.A.S.T.	Implemented
<u>20.9</u>		
<u>MANAGEMENT</u> (Total time allocated: 21 person months)		
9.0	A. ALEXANDER - Management Specialist; Development of MIS	Implemented
<u>9.0</u>		
<u>UNUSED TECHNICAL ASSISTANCE:</u>		
<u>12.0</u>	D. FRANCIS - Vocational School Education MIS Specialist (Consultancy to begin 12/19/88)	

Table III

EQUIPMENT PROVIDED TO THE MINISTRY OF EDUCATION

	<u>Cost of Basic Equipment</u>	<u>Cost of Innovative Equipment</u>
TECHNICAL HIGH SCHOOLS	NA*	\$520,830
TECHNICAL VOCATIONAL UNIT (TRAINING MATERIALS RESOURCE CENTER)	NA	\$ 34,450
COLLEGE OF ARTS, SCIENCE AND TECHNOLOGY	NA	\$ 15,493
TOTAL		\$570,773

* Expenditures were made in this equipment category, but not through GE/RCA. Another contractor, RONCO, was used for the procurement of basic equipment.

Table II

PARTICIPANT TRAINING AT THE MINISTRY OF EDUCATION

<u>SHORT-TERM</u> (PERSON MONTHS/# PARTICIPANTS)	9.25/14
<u>LONG-TERM</u> (PERSON MONTHS/# PARTICIPANTS)	<u>48.00/ 4</u>
<u>TOTAL PERSON MONTHS/# PARTICIPANTS</u>	<u>57.25/18</u>
TOTAL COST	\$151,610.00
AVERAGE COST PER PERSON MONTH OF TRAINING	\$ 2,648.00
NO LONGER CONNECTED TO THE PROJECT (PERSON MONTHS/# PARTICIPANTS)	0.50/1*
ESTIMATED LOSSES DUE TO DEPARTURE OF PARTICIPANT TRAINEES FROM PROJECT	\$ 1,324.00
<u>% OF PARTICIPANT TRAINING EXPENDITURE LOST:</u>	0.87%

* One individual who received participant training has retired from MOE. All other training recipients are still connected to the project and employed by the MOE, C.A.S.T. or a Technical High School.

Table I

SHORT TERM TECHNICAL ASSISTANCE PROVIDED TO THE MINISTRY OF EDUCATION

All figures in person months:

	<u>Person Months Allocated</u>	<u>Implemented</u>	<u>Not Implemented</u>	<u>Implementation Status Unknown</u>	<u>Total T.A. Expended</u>	<u>Unused T.A.</u>
<u>TEACHER TRAINING</u>	18.0	20.56	.34	---	20.9	NA
<u>MANAGEMENT</u>	21.0	9.0	---	---	9.0	12.0
<u>CURRICULUM</u>	15.0	17.95	---	---	17.95	NA
<u>MATERIALS DEVELOPMENT</u>	12.0	11.9	---	---	11.9	.1
<u>PROJECT DEVELOPMENT</u>	12.0	- 0 -	---	---	- 0 -	12.0
<u>TOTALS.....</u>	<u>78.0</u>	<u>59.41</u>	<u>.34</u>	<u>- 0 -</u>	<u>59.75</u>	<u>24.1</u>

TOTAL TECHNICAL ASSISTANCE EXPENDITURE: \$745,990.00

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SUMMARY OF H.E.A.R.T. TRUST COST DATA

Technical Assistance

A total of 31.65 person months of short-term technical assistance have been provided to the H.E.A.R.T. Trust component of the BSTP. An additional 30 person months of technical assistance have been charged to H.E.A.R.T. but the actual assistance was rendered to the non-formal component of the project (See Table I). The cost of all technical assistance charged to the H.E.A.R.T. Trust (61.65 person months) is US\$1,380,000 (excluding home office, G & A, and fixed fee costs). 30.5 person months of technical assistance remain to be used.

Of the 31.65 person months of technical assistance provided to the H.E.A.R.T. Trust, 7.3 person months have not been implemented. As the estimated average cost of overseas technical consultants is US\$10,000 per person month, this "lost time" represents a financial loss of approximately US\$73,000 (or approximately 5.3%) to the project. (For further details on the amount of technical assistance provided in particular areas, see Table I.)

Participant Training

Table II summarizes the story of overseas training provided to H.E.A.R.T. Trust staff. A total of 26.5 person months of short-term and 15 person months of long-term participant training have been provided to project staff on the H.E.A.R.T. component of the BSTP. Of the thirty-two (32) participants, three (3) individuals, representing 6.25 person months, have left the employe of H.E.A.R.T. since their training. At an average rate of US\$5,302 per person month of training, the departure of these individuals from the project represents a loss of US\$33,137.50 (or 15% of the total participant training expenditure).

Equipment

Funds in the amount of US\$112,00 were budgeted for equipment for the H.E.A.R.T. component of the project. These funds were used to purchase computer equipment, a Burroughs XE 550 mini-computer and accessories, procured at a total cost of US\$151,800. As this amount exceeded the amount in the equipment budget, US\$ 39,800 in contingency funds were allocated to supplement the basic amount.

An additional US\$ 17,680 were spent on the purchase of two Ford Escort wagons for the Trust. The full amount for the cars was taken from contingency funds. To date, a total of US\$169,480 have been spent on equipment for the H.E.A.R.T. Trust (See Table III).

Table I

SHORT TERM TECHNICAL ASSISTANCE PROVIDED TO THE H.E.A.R.T. TRUST

All figures in person months:

	<u>Person Months Allocated</u>	<u>Implemented</u>	<u>Not Implemented</u>	<u>Implementation Status Unknown</u>	<u>Total T.A. Expended</u>	<u>Unused T.A.</u>
<u>MANAGEMENT INFORMATION SYSTEMS</u>	6.0	0.5	6.7	0.6	7.8	NA
<u>PROJECT DEVELOPMENT</u>	8.0	5.9	---	---	5.9	2.1
<u>SPECIFIC TRAINING PROBLEM</u> [* An additional 9.4 person months of T.A. in this category was charged to H.E.A.R.T. but rendered to the non-formal component.]	16.0	6.45	---	---	6.45*	NA*
<u>ADMIN. OF REVOLVING HEART FUND</u> [Note: As the Revolving Trust Fund was not implemented, the C.O.P. re-allocated this T.A. to work on management information systems.]	4.0	4.0	---	---	4.0	NA
<u>EQUIPMENT SPECIALIST</u> [** An additional 3.0 person months of T.A. in this category was charged to H.E.A.R.T. but rendered to the non-formal component.]	10.0	7.5	---	---	7.5**	NA**
<u>TRAINING/MONITORING/EVALUATION</u>	6.0	---	---	---	---	6.0
<u>COMMODITY/LOGISTICS SPECIALIST</u>	12.0	---	---	---	---	12.0
<u>TOTAL.....</u>	<u>62.0</u>	<u>24.35</u>	<u>6.7</u>	<u>0.6</u>	<u>31.65</u>	<u>20.1</u>

<u>OTHER KINDS OF TECHNICAL ASSISTANCE CHARGED TO H.E.A.R.T. AND RENDERED TO MYCD/MOE</u>	<u>PERSON MONTHS ALLOCATED</u>	<u>PERSON MONTHS EXPENDED</u>	<u>UNUSED T.A.</u>
Planning and Research	22.0	11.6	10.4
School Leavers/Placement	6.0	6.0	NA

Table II

PARTICIPANT TRAINING AT THE H.E.A.R.T. TRUST

<u>SHORT-TERM:</u>	
<u>PERSON MONTHS/# PARTICIPANTS</u>	26.50/31
<u>LONG-TERM</u>	
<u>PERSON MONTHS/# PARTICIPANTS</u>	<u>15.00/ 1</u>
<u>TOTAL PERSON MONTHS/# PARTICIPANTS</u>	41.50/32
<u>TOTAL COST</u>	\$220,052.00
<u>AVERAGE COST</u>	
<u>PER PERSON MONTH OF TRAINING</u>	\$ 5,302.00
<u>NO LONGER CONNECTED TO THE PROJECT</u>	
<u>(Person Months/# Participants)</u>	6.25/ 3
<u>ESTIMATED LOSSES DUE TO DEPARTURE</u>	
<u>OF PARTICIPANT TRAINEES FROM PROJECT</u>	\$ 33,137.50
<u>% OF PARTICIPANT TRAINING EXPENDITURE LOST:</u>	15%

Table III

EQUIPMENT PROVIDED TO THE H.E.A.R.T. TRUST

	<u>COST</u>
Computer Equipment: (Burroughs XE 550 Minicomputer)	\$151,800
Automobiles: (Two (2) Ford Escort Wagons)	\$ 17,680
TOTAL EXPENDITURES	US \$169,480

Note: This total exceeded the US\$112,000 in the Equipment budget, but US\$57,480 in Contingency funds were allocated to supplement the amount budgeted.

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SUMMARY OF MYCD COST DATA

TECHNICAL ASSISTANCE

As Table I highlights, 63.70 person months of short term Technical Assistance has been provided to the Non-Formal Component of BSTP. (The source data for Table I is contained in Appendix A.) An additional 38.30 person months of technical assistance was provided to the non-formal component but charged to HEART or MOE.

Of the 63.70 person months of short term technical assistance charged to the non-formal component 24.95 person months or 39% has been implemented. Non-implementation occurs most frequently with respect to curriculum development. The factors contributing to the non-utilization of curriculum development materials have been discussed elsewhere.

RCA/GE is not required to report cost data for individual consultants. Therefore, it is not possible to determine precisely the associated costs of this non-implementation. However, estimates have been arrived at using an average figure of \$10,000/person month for overseas consultants and \$3,300/person month for local consultants. These cost figures were provided by Lorna Parkins, Administrative Manager, RCA/GE. Based on these average cost figures, it was determined that approximately \$122,310 has been spent on technical assistance that has not been implemented. These figures do not include home office, G & A or fixed fee costs. For the purposes of this exercise it was assumed that that when the work of a consultant was partially implemented 50% of that work was implemented.

PARTICIPANT TRAINING

Table II provides data on long and short term participant training. A total of 29.25 person months of short term training was provided to 27 individuals. A total of 66 person months of long term training was provided to 5 individuals. Of the 32 individuals who received training under BSTP, 27 are no longer associated with the project. A total of \$196,324, excluding home office, G & A and fixed fee costs, was spent on participant training. Using average cost data for each agency this contractor estimates that \$171,816 was spent to train individuals who are no longer associated with the project. This implies that approximately 88% of the funds expended on participant training have been lost to the project.

PROCUREMENT

RCA/GE is required to provide information on procurement to date. The figures presented in Table III are taken from RCA/GE reports. It should be noted that there is a discrepancy in this cost data. RCA/GE reports that \$20,976 was spent on innovative equipment for MYCD. However, the ministry reports that no innovative equipment was delivered to the Ministry. Discrepancies in procurement data as it relates to MYCD should be investigated.

TABLE I

SHORT TERM TECHNICAL ASSISTANCE
IMPLEMENTATION STATUS REPORT a/

NOTE: Figures in table represent person months of technical assistance

	IMPLEMENTED	NOT IMPLEMENTED	PENDING	UNDETERMINED	NOT APPLICABLE	TOTAL
CURRICULUM	9.40	17.20	2.30	0.45	0.10	29.45
MANAGEMENT	8.95	2.70	1.00	-0-	-0-	12.65
COUNSELLING	1.20	-0-	-0-	2.00	-0-	3.20
TESTING	-0-	-0-	6.00	-0-	-0-	6.00
MONITORING	4.00	-0-	-0-	-0-	-0-	4.00
TRACER STUDIES	-0-	-0-	-0-	-0-	7.00	7.00
PLACEMENT	1.40	-0-	-0-	-0-	-0-	1.40
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TOTAL	24.95	19.90	9.30	2.45	7.10	63.70

a/ Includes TA charged to Non-Formal Component Only

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TABLE II
PARTICIPANT TRAINING

	MYCD/NFED	VTDI	SDC	GARMEX	STONY HILL	PORTMORE	KENILWORTH	TOTAL
SHORT TERM (PM/#)	4.75/8	6.00/3	1.75/4	2.75/5	10.00/4	4.00/3	-0-	29.25/27
LONG TERM (PM/#)	12/1	30/2	24/2	-0-	-0-	-0-	-0-	66.00/5
TOTAL (PM/#)	16.75/9	36.00/5	25.75/6	2.75/5	10.00/4	4.00/3	-0-	95.25/32
NO LONGER CONNECTED TO PROJECT (PM/#)	16.75/9	36.00/5	13.75/5 <u>c/</u>	2.25/4	7.00/3	1.00/1	-0-	88.75/28
TOTAL COST <u>a/</u>	\$51,550	\$91,697	\$40,856	\$3157	\$3,625	\$5,439	-0-	196,324
AVERAGE COST/PERSON MONTH OF TRAINING <u>a/</u>	\$3,078	\$2,478	\$1,587	\$1148	\$402	\$1,360	-0-	NA
ESTIMATED LEAKAGE <u>d/</u>	\$51,550	\$91,697	\$21,821	\$2,583	\$2,814	\$1,360	-0-	171,816

a/ Excluding Home Office, G & A, and Fixed Fee Costs

b/ Leakage = Average Cost X # of Person Months of Training Lost to Project

c/ One long term participant trainee was reassigned to Portmore Academy.

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TABLE III

PROCUREMENT a/

MYCD/NFED	VTDI	SDC	GARMEX	STONY HILL	PORTMORE	KENNILWORTH	TOTAL
\$20,976. <u>b/</u>	\$75,362.	-0-	\$7,716	-0-	\$1,800.	\$562,591.	\$668,445.

a/ Excluding Home Office, G & A and Fixed Fee Costs

b/ MYCD reports that no innovative equipment was delivered to the Ministry. RCA/GE reports show that a Xerox copier valued at \$7,931 and general equipment valued at \$13,045 was delivered to MYCD.

APPENDIX A

TECHNICAL ASSISTANCE TO THE NON-FORMAL COMPONENT OF BSTP

CONSULTANT	CATEGORY	P.M. EXPENDED	IMPLEMENTATION STATUS
Avani	Curriculum Development	3.00	Not implemented in academie
Dillon	Curriculum Development	2.80	Partially implemented
Hall	Curriculum Development	0.10	Not Implemented
Harrington	Curriculum Development	2.30	Pending
Kendrick	Curriculum Development	1.00	Not Implemented
McMinn	Curriculum Development	0.70	Not Implemented
Morgan	Curriculum Development	4.00	Implemented
Porterfield	Curriculum Development	5.00	Not Implemented
Ruddock	Curriculum Development	1.00	Implemented
Stewart	Curriculum Development	1.00	Implemented
McClennan et al	Curriculum Development	7.00	Not Implemented
Lurch, Dally	Curriculum Development	1.00	Partially Implemented
Vacarro	Curriculum Development	0.45	Undetermined
Bryant	Management	1.00	Pending
F. Johnston	Management	2.70	Not implemented
Lawson	Management	7.00	Implemented
Leshko	Management	0.70	Implemented
Tapper	Management	1.25	Implemented
M. Johnston	Counselling	2.00	Undetermined
M. Johnston	Counselling	1.20	Implemented
May	Placement	1.40	Implemented
Storm	Testing	6.00	Pending
Eaddy	Monitoring	4.00	Implemented
Teape-Johnston	Tracer Studies	7.00	Not Applicable
		<hr/> 63.70	

TECHNICAL ASSISTANCE CHARGED TO HEART/MOE AND ASSIGNED TO NON-FORMAL COMPONENT

CONSULTANT	CATEGORY	P.M. EXPENDED	IMPLEMENTATION STATUS
Gilley	Curriculum Development	1.00	Implemented
Gooden	Curriculum Development	2.40	Implemented
Lynch	Curriculum Development	8.30	Implemented in high schools
Jaffee	Management	3.20	Implemented
F. Johnston	Management	8.40	Not Implemented
Lawson	Management	6.00	Implemented
Teape-Johnston	Tracer Studies	5.00	Not Applicable
Porterfield	Equipment	3.00	Implemented
May	Monitoring	1.00	Undetermined
		<u>38.30</u>	

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A REVIEW OF RCA/GE INPUTS
INTO THE
NON-FORMAL SKILLS TRAINING COMPONENT OF THE
BASIC SKILLS TRAINING PROJECT

Prepared by: Lorraine Blank, Ph.D.
August 26, 1988

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I. Purpose of Report

The following report documents RCA/GE inputs into the Ministry of Youth and Community Development under the Basic Skills Training Project (BSTP). The purpose of this review is to: ascertain what RCA/GE was requested to do by US/AID and HEART/MYCD; to identify RCA/GE proposed inputs into the project; and to detail items that RCA/GE was asked to undertake that were not included in the Request for Proposal and/or contract between US/AID and RCA/GE.

This report also reviews the changing institutional arrangements in the non-formal skills training sector; provides a brief implementation progress report for the non-formal skills training component of BSTP and provides data on RCA/GE inputs to date. The current status of returned long term participant trainees is reviewed in order to determine the extent to which these trainees are utilizing the knowledge and skills provided under the project in delivering skills training in Jamaica.

II. METHODOLOGY

Data for this report was derived from relevant project documents including: the project paper (PP); the Request for Proposal (RFP); the contract between RCA/GE and US/AID; and the project agreement and amendments. The RCA/GE proposal was reviewed as well as RCA/GE quarterly reports; monthly reports; consultants work statements; consultants reports; and training reports. The internal reviews for 1985 and 1986 were also referenced. In addition to the review of the above documents interviews were conducted with the following people: Audrey Tomlin, US/AID project director; Craig Clauser, RCA/GE Chief of Party; Lorna Parkins, RCA/GE Administrative Manager; Jennifer Cadogan, NFED Director; Eleanor Allman, NFED Training Officer; Hector Lawrence, VTDI Principal; Zephaniah Muschette, Acting Coordinator, Curriculum Development Unit, VTDI; Egbert Lewis, SDC Executive Chairman; Winston Pagon, SDC Director of Youth Camps and Academies; Cheryl Dash, SDC Director of Finance and Administration; Stan Dunwell, HEART Trust Director of Projects; Joyce McKenzie, HEART Trust Deputy Director of Projects; Van Hitchner, HEART Trust Director of Training; Moses Peart, HEART Trust Deputy Director of Curriculum Development; Mercivelle McIntosh, Stony Hill Academy, Deputy Manager, Technical and Academic Division; Errol Christie, Portmore Academy, Deputy Manager, Technical and Academic Division; Eric Swaby, Portmore Academy, Deputy Manager, Administrative Support Services; and Beverly Clark, Garmex Academy, Manager, General Education, Training and Welfare Services. Returned long term trainees were also interviewed.

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III. PROJECT GOALS AND RCA/GE RESPONSIBILITIES IN THE NON-FORMAL SKILLS TRAINING SYSTEM

The non-formal skills training segment of the BSTP has addressed the need to "upgrade and expand the facilities, equipment, institutional technology, and management necessary for delivering a flexible, comprehensive and expanded program of non-formal skill training." (RFP, p. 12) More specifically, assistance to the non-formal skills training system was designed strengthen the GOJ's ability:

- 1) to develop the technical and managerial capability through MYCD to equip entry level workers with the skills required by employers;
- 2) to update the non-formal curricula, instructional technology and training materials for approximately 20 trades;
- 3) to strengthen a functioning Instructional Materials Production Center (hereafter referred to as the Training Materials Resource Center);
- 4) to establish standards and proficiency tests for approximately 20 trades; and
- 5) to establish and operate four new HEART academies.

Both the PP and RFP specify that the project would introduce and adapt for use in Jamaica technological advances in training, e.g. self-paced, competency based, modularized and programmed instructional technologies and that it would assist in the development of training materials designed to address the need for improved work attitudes and training for self-employment. The PP and RFP state that, through the Training Materials Resource Center, the HEART academies, private firms and other private and public sector training institutions would have access to a wide variety of training materials and curricula and would receive assistance from VTDI in adjusting these materials to meet their specific requirements.

As stipulated in the contract between US/AID and RCA/GE, contractor responsibilities vis a vis the above goals were to provide training in management and operation of the non-formal training centers; to provide appropriate innovative instructional technology and materials; and to provide assistance in the development of four HEART academies. (US/AID, RCA/GE Contract, p.4) The Scopes of Services for the two long term technical advisors assigned to the non-formal skills training component of the project further delineate these

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responsibilities. These Scopes of Service and presented in Appendices A and B. Contractor responsibilities with respect to the development of Training Materials Resource Center were to assist in the development of a long range institutional development plan for the center. The RCA/GE proposal specifies that the contractor will "develop a plan for the TMRC during the initial stages of the project, implement it in the middle stages and convert it to a manual of operations in the projects later stages." (RCA/GE proposal, p. 2-97) Contractor responsibilities with respect to the establishment of trade standards and proficiency tests were not specified in project documents. However, the RCA/GE proposal identified this project goal as one aspect of the curriculum development assistance that it would provide to the project. (RCA/GE Proposal, p. 2-109)

IV. PROJECT COMPONENTS FOR THE NON-FORMAL SKILLS TRAINING SYSTEM

In order to realize the above goals, funding has been provided for three main project components: technical assistance; participant training; and equipment and procurement. All project documents contain identical specifications for contractor inputs in each of these components. As identified in project documents and agreed to in the RCA/GE proposal and contract, contractor inputs for each of these components were to be as follows:

A) PARTICIPANT TRAINING: The contractor was assigned responsibility for assessment of staff training requirements and development of a participant training plan. RCA/GE was assigned responsibility for all participant training arrangements under the contract. The project provided for 116 person months of participant training as follows:

<u>LONG TERM</u>	N (PM)
Vocational Administration	5 (48)
Pedagogy	5 (48)
<u>SHORT TERM</u>	
Management, testing, monitoring/inspecting, tracer studies, curriculum development and adaptation	10 (20)

In-service training was to be provided for project connected personnel in administration and management; testing; monitoring/inspecting; tracer studies; and curriculum and materials development and adaptation.

B) TECHNICAL ASSISTANCE: Technical assistance was to be provided through two long term technical advisors: a Non-Formal Skills Training Specialist for the duration of the five year project and a Curriculum Development Specialist for two years. Short term technical assistance was to be provided for a total of approximately 62 person months in the following areas: monitoring/inspecting; testing; tracer studies; procurement; curriculum development; counselling and management.

C) EQUIPMENT: As stated in the RFP, the contractor was to provide procurement services for US/AID financed commodities. The contractor was given responsibility for identification of need, development of specifications, scheduling of procurement and installation of training tools, equipment, international technology, materials and curricula. The contractor was also given responsibility for rationalization of existing equipment, tools and machinery including repair of usable equipment where feasible.

V. INSTITUTIONAL ARRANGEMENTS IN THE NON-FORMAL SKILLS TRAINING SYSTEM

Historically, the Ministry of Youth and Community Development (MYCD) through the Social Development Commission (SDC) and the Vocational Training Division (VTD) was the implementing agency for non-formal skills training in Jamaica. Although MYCD provided skills training in a number of institutions, BSTP has provided assistance to only two of these training programs: the HEART academies and the Vocational Training Development Institute (VTDI). The project provided assistance to four HEART academies which were to be administered by a new division within MYCD, the Non-Formal Education Division (NFED). In addition to the assistance provided to the academies and to VTDI, technical assistance and training have been provided in order to improve the management capability within the Ministry of Youth and Community Development.

As stated above, project documents identified the NFED as the unit responsible for the administration and oversight of the four academies under the project. Formation of the NFED was identified as a condition precedent of the project agreement signed by US/AID and GOJ on August 5, 1983. However, formal

approval for the establishment and operation of NFED was not granted until August 28, 1986 and official approval for staffing was not given until October 14, 1986. Prior to this, staff had been appointed but without the formal approval of the Minister of the Public Service and the Minister of Finance. In spite of the fact that official approval for the staffing of NFED was given in October, 1986 the division was never fully staffed. At no time was there a full complement of staff at NFED. In addition, there was a very high turnover of staff that were assigned to the division.

Confusion regarding areas of responsibility between the NFED, VTDI and the Social Development Commission (SDC) surfaced early in the project. The SDC had been identified in project documents as the agency responsible for provision of support services to the NFED but its formal role in the project was unclear. P.I.L. #16, dated August 6, 1986, delineated the broad areas of responsibility for NFED, VTDI, and SDC. The NFED was given responsibility for the development of policy options; forward planning; quality control; and general technical and professional advisory services to the three HEART academies then under MYCD authority. The SDC was given operational responsibility for management and personnel functions; organizational requirements and staffing; training programs; logistical support; facility management; and trainee support activities. The VTDI was designated as the agency responsible for development and upgrading of curricula for the HEART academies under MYCD authority. Responsibility for staff development in these HEART academies was also assigned to VTDI. In order to clarify these organizational arrangements an inter-agency agreement between MYCD and the HEART Trust was negotiated. This inter-agency agreement was not approved by the HEART Trust.

Project funds were provided to assist four academies offering skills training in construction (Portmore Academy); repair and maintenance (Cobbla Academy); Commercial Skills (Stony Hill); and a fourth academy which was identified after the start of the project. P.I.L. #11, dated February 28, 1986 designated the Garmex Academy for the garment trades as the fourth academy to be assisted under the project. It also assigned administrative responsibility for supervision of the operations of this academy to the Ministry of Industry and Commerce acting through the agency of the Jamaica Industrial Development Corporation (JIDC).

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P.I.L. #20, dated August 17, 1987, substituted Kenilworth Academy for garment and commercial skills for Cobbla Academy and assigned administrative responsibility for Kenilworth Academy to the HEART Trust. P.I.L. also #20 transferred responsibility for the operation of Garmex to the HEART Trust. This removed the Ministry of Industry and Commerce and JIDC from the project.

Following student protests at the Stony Hill Academy on February 26, 1988 and an enquiry into the problems at this academy the Prime Minister instructed that, effective May 17, 1988, the funding, management and operational responsibility for both Stony Hill and Portmore academies was transferred to the HEART Trust. The HEART Trust is now responsible for the management and operation of all academies assisted under the Basic Skills Training Project. To date there has been no formal contract modification regarding the roles and responsibilities of MYCD/NFED, SDC and VTDI and clarification of their continued function in the project is still pending.

VI. IMPLEMENTATION PROGRESS REPORT

A brief implementation status report for each of project goal is contained in this section. A detailed report on RCA/GE inputs as they relate to these goals is contained in sections VII through IX.

GOAL 1: To develop the technical and managerial capability through MYCD to equip entry level workers with the skills required by employers.

Given the changing institutional arrangements as described above, the current applicability of this goal will have to be assessed.

Goal 2: To update the non-formal curricula, instructional technology and training materials for approximately twenty (20) trades.

Long and short term technical assistance and participant training have been provided to assist in the attainment of this goal. As of May, 1988 curriculum guides had been developed for 16 programs. Mr. Muschette, Acting Co-ordinator of Curriculum Development at VTDI, reports that all curriculum guides are currently in use. However, Mr. Peart, Deputy Director for Curriculum Development, HEART Trust, reports there has been no assessment of the effectiveness of the curriculum guides or the extent to which they are being used.

The following curricula have been developed and are included in the first pilot test of competency based curriculum currently in progress at Stony Hill Academy: typing; financial responsibilities, business communications, general clerical; and office machines. Curricula for mathematics, English, Civics, family life and career skills have been written and are in use. The family life and career skills curricula are currently under review by the HEART Trust to determine whether revision of the materials will be necessary. Curricula have been written for shorthand; book-keeping and accounting; general business principles; word processing; masonry; steel fixing; welding/fabrication; painting/decorating; carpentry/joinery; and electrical installation. None of this last group of materials is currently in use.

GOAL 3: Strengthening the Training Materials Resource Center

A long term technical advisor for Curriculum Development was assigned to VTDI for two years. He was assigned responsibility for the preparation of a long range development plan for the Training Materials Resource Center. A plan was developed by RCA/GE technical advisors working in conjunction with VTDI staff. The plan was not approved.

Short term technical assistance in curriculum development and management has also been provided to VTDI. Four staff members have participated in a total of 7 person months of short term training. Three members of the staff have participated in long term training programs; all of these individuals received bachelors degrees in vocational education and one also completed work on a masters degree. Members of staff have also participated in in-service training programs.

Renovations to the annex of VTDI were undertaken to provide facilities for TMRC. The center is in the process of relocating its offices to the renovated annex. There are currently four writers, two typists and an Acting Co-ordinator on staff. A list of innovative equipment for the center was vetted. The complete list of innovative equipment was not approved. A Xerox machine, books and curriculum materials have been ordered and are currently in place.

In spite of project inputs to VTDI, the short term technical advisor assigned to assess the curriculum development efforts and capabilities of VTDI concluded that "...the institution lacks even the most minimal requirements for functioning as a

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curriculum development unit. Especially acute are the problems in management, facilities, and staff expertise and morale." (T. Harrington, November 17, 1987; p. 5) A review of the future role of VTDI in the Basic Skills Training Project is currently underway. Mr. Muschette, Acting Co-ordinator for Curriculum Development at TMRC, reports that the center is continuing with its curriculum development efforts pending further notification on its future responsibilities in the project.

GOAL 4: Establishment of Proficiency tests for approximately twenty (20) trades.

Proficiency tests have been developed for the following trades: Carpentry, masonry, plumbing, electrical installation, welding and clerk/typist. According to Van Hitchner, Director of Training, HEART Trust, the proficiency tests are not in use at the present time. He attributes this to the fact that there has not been a new group of trainees who could take the tests since their development in March, 1988. Mr. Hitchner reports that a final decision on how best to use the tests is awaiting a review of the cost considerations in test administration.

GOAL 5: Establishment and operation of four new HEART Academies.

The four academies which have been assisted under the project are all in operation. Stony Hill, was officially opened prior to the start of BSTP. To date 1,589 trainees have been recruited for Stony Hill; 687 have graduated from the academy. Portmore was officially opened on December 12, 1985. The academy has recruited 1,649 trainees. Of these, 895 have graduated and 487 are presently enrolled. Garmex was opened under JIDC in October, 1985 and formally added to the project in March, 1986. Between December, 1985 and July, 1988 Garmex admitted 15,456 trainees; 7,436 of these trainees completed the program. Although it has not been officially opened Kenilworth admitted its first group of students in June, 1988. Seventy-two trainees are currently enrolled in the sewing program; 39 have graduated from that program. There are currently 91 trainees enrolled in the pre-data entry program at Kenilworth. To date there have been no graduates from this program.

Technical assistance and training has been provided in management and administration; curriculum development; counselling; placement services; tracer studies; procurement; food service and testing. Basic equipment is in place at all academies. Innovative equipment is in place at Garmex Academy and has been approved for Stony Hill Academy.

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VII. TECHNICAL ASSISTANCE TO DATE

Project documents called for 84 person months of long term technical assistance and approximately 62 person months of short term technical assistance for the non-formal component of BSTP. Long term assistance was to be provided through a Non-Formal Skills Training Specialist for the duration of the five year project and a Curriculum Development Specialist for two years.

The Non-Formal Skills Training Specialist

In addition to serving as a general resource person to the non-formal skills training sector, the Non-Formal Skills Training Specialist was to provide technical assistance in planning and policy-making for HEART academies; assistance in budget preparation and financial management; assistance in the design and implementation of instructor training programs; technical direction for development of curriculum; development of instructional support systems including enrollment, counselling, job placement and follow-up; assistance in development of non-formal adult education and assistance in fostering the participation of the private sector in skills training.

Two individuals have served as RCA/GE's Non-Formal Skills Training Specialist. The first served from September, 1984 until August, 1985. His contract was terminated by decision of RCA/GE. The second served from October, 1985 through August, 1987. Effective August 28, 1985 the position was terminated because it was felt that "The Technical Assistance required (and approved for MYCD) cannot be provided by the incumbent." (RCA/GE Technical Assistance Plan, August 1, 1987 to August 1, 1989, p. 1) The Manager, Technical Operations, Formal Skills Training, assumed the duties of the Non-Formal Skills Training Specialist and the remaining person months of long term technical assistance were made available for short term technical assistance. RCA/GE has been operating according to this revised technical assistance plan although no contract modification between US/AID and RCA/GE has been signed.

The Non-Formal Skills Training Specialist worked directly with the Ministry of Youth and Community Development and with its implementing agencies. Data on RCA/GE long term technical assistance inputs is derived from a review of project reports; minutes of committee meetings; and interviews. Interviews at NFED were conducted with Dr. Jennifer Cadogan, Director and Eleanor Allman, Training Officer. Because of the high turnover of senior staff at NFED there are no senior officers on staff

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who worked directly with the long term technical advisors. Dr. Cadogan's comments are based upon her review of project reports; minutes of committee meetings; and staff reports. Ms. Allman has been on staff since the inception of the project and worked directly with the long term technical advisors and with many of the short term consultants who were assigned to the division. Interviews were also conducted at SDC with Egbert Lewis, Executive Chairman, and Winston Pagon, National Director of Youth Camps and Academies and with the staff of RCA/GE. Interviewees were asked to review the scope of service for the Non-Formal Skills Training Specialist and to provide information on the inputs provided in each area.

Although the Non-Formal Skills Training Specialists took an active part in project meetings, it is unclear the extent to which policy making authority was vested in MYCD or the extent to which the technical assistance provided formed the base from which policy was made. Dr. Cadogan reported that long term technical assistance "as it related to vocational education in Jamaica" was not provided. Technical assistance with budget preparation, financial management and development of instructional support systems was provided via short term consultants with the long term technical advisor assuming a coordinating role. Technical direction in the development of curricula and instructor programs occurred through an ongoing program of in-service and participant training. Short term technical assistance was provided to develop a system of recruitment, enrollment, job placement and counselling. Interviewees reported that assistance in the development of non-formal adult education was not provided. Technical assistance was provided to foster the participation of the private sector in curriculum content committees and in the development of proficiency tests but not in academy administration or management. However, Mr. Lewis stated that private sector participation on curriculum committees was more the result of GOJ policy than the results of inputs of the technical advisor.

The Curriculum Development Specialist

Long term technical assistance was also provided through a Curriculum Development Specialist. This advisor was responsible for development of a long range institutional development plan for TMRC; assistance in curriculum development, including adoption and adaptation of existing materials; development of dissemination strategies for instructional materials to the HEART academies, evening programs at the technical high schools, and private and public

sector training institutions; preparation of teacher orientation materials, organization of workshops to introduce the new skills training instructional materials and curricula; and collaboration with private and public sector training institutions. Two individuals served in the position. The first resigned shortly before the completion of his two year term; the second left upon termination of the position.

Data for this section is derived from a review of project reports, committee meetings and interviews with RCA/GE staff, and Mr. Lawrence and Mr. Muschette of VTDI. Technical assistance was provided to prepare a long range insitutional development plan for instructional materials and curricula at TMRC. This plan was not approved. Technical assistance was provided for the development of instructional materials in the relevant trades as well as development of curricula for enhancement of life coping skills, improved work attitudes and training for self-employment. The emphasis initially was on development of new materials. However, following the first internal review of the project, emphasis shifted to adaptation of existing materials. No procedural manual for curriculum development was provided during the term of the Curriculum Development Specialist. There was general consensus that coordination of curriculum development efforts was lacking and that effective use of Jamaican counterparts in the curriculum development process did not occur. Technical assistance was provided to assist in the dissemination of non-formal skills training materials and curricula to the HEART academies. Dissemination of materials to other private and public sector training institutions has occurred only to the extent that JAGAS and MOE utilize the automechanics curriculum developed by short term consultants. The Curriculum Development Specialist was active in the preparation of teacher orientation materials and workshops. Collaboration with private and public sector training institutions in the development of materials and curricula or in the conduct of field studies and evaluations of the new curriculum implementation process did not occur.

Short Term Technical Assistance

Original project documents called for approximately 62 person months of short term technical assistance in the following areas: monitoring/inspecting; testing; tracer studies; procurement; curriculum development; counselling; and management. Data on short term technical assistance to date is provided in Table 1. More detailed information on technical assistance by category of assistance and year is presented in Appendix C. As shown in Table 1, a total of 64.9 person months of short term technical assistance has been provided. Almost one half of the short term technical assistance provided to the

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non-formal skills training component of the project has been devoted to curriculum development. The figures reported in Table 1 do not include the short term technical assistance that was provided to the non-formal component of the project but charged to the HEART Trust or MOE. Data on this technical assistance is presented in Table 2.

TABLE 1. SHORT TERM TECHNICAL ASSISTANCE BY
CATEGORY OF ASSISTANCE

	Person Months
Monitoring/Inspecting	4.00
Testing	6.00
Tracer Studies	7.00
Procurement	0.00
Curriculum Development	30.35
Counselling	4.90
Management	11.40
Other	<u>1.25</u>
TOTAL	64.90

TABLE 2. SHORT TERM TECHNICAL ASSISTANCE PROVIDED TO
THE NON-FORMAL SECTOR AND CHARGED TO HEART
OR MOE

	PERSON MONTHS
Curriculum Development	11.7
Planning/Research	03.2
Tracer Studies	05.0
Management	06.4
Monitoring	03.0
Procurement	<u>03.0</u>
TOTAL	32.3

An information sheet on each short term technical advisor is contained in Appendix D. The date that the consultancy was requested; the date that it was approved by US/AID; the duration of the consultancy; the Ministry or Agency to which the consultant was assigned; the Ministry or Agency charged; the major achievements of each consultancy; and the implementation status of the consultants recommendations is provided on the consultants information sheet. The approval process for consultants work involves submission of a final report followed by an exit interview with the consultant. HEART Trust and RCA/GE representatives attended every exit interview; the US/AID project director attended almost every exit interview.

A review of the information sheets contained in Appendix D shows that the recommendations of the short term technical advisors have not always been implemented. Non-implementation has occurred primarily, although not exclusively, with respect to curriculum development. Non-implementation is especially prevalent with curricula developed for the building trades. Interviewees identified multiple reasons for this. Some of these reasons were identified in the discussion of long term technical assistance inputs. They are reported in more detail in this section. Data for this section is derived from interviews with the following people: Craig Clauser and Lorna Parkins, RCA/GE; Hector Lawrence and Zephaniah Muschette, VTDI; Moses Peart, HEART Trust; and Tracy Harrington, curriculum development consultant.

The RCA/GE proposal specified a model for curriculum development that would be followed. (RCA/GE Proposal, p. 2-61) Formalization of these procedures was to have been accomplished early in the project timeline. A procedures manual for curriculum development, including formalization of the approval process for new curricula, is only now being prepared. The failure of the short term technical advisors to effectively utilize Jamaican counterparts often resulted in the development of curriculum materials that were not appropriate to the Jamaican context. Support services at VTDI, including typing, xeroxing and writing, were not adequate for the task of developing curricula in so many fields. Lack of familiarity with the concept of competency based education and failure to effectively involve academy staff in the curriculum development process meant that they did not feel a "sense of ownership" of the materials. This may have lessened their incentive to utilize the new curriculum materials. Interpersonnel problems between local and overseas consultants and between consultants and academy staff were also identified as contributing to the problems that occurred in the curriculum development process.

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Technical Assistance Not Requested in Original Project Documents

Technical assistance has been provided in the areas of food service management and facility management although project documents did not specify that assistance was to be provided in these areas. Technical assistance was directed to JIDC although this agency was not identified in the original project documents. JIDC staff were also included in participant training programs.

VIII. PARTICIPANT TRAINING TO DATE

Project inputs called for 116 months of long and short term participant training plus in-service training for project connected personnel. RCA/GE was assigned responsibility for all participant training arrangements under the contract. The contractor has provided both long and short-term technical assistance to assess training needs and has assisted in the development of training plans. In addition, RCA/GE has assisted each participant trainee in developing an individualized training plan and in selecting the appropriate training institution. RCA/GE has made the necessary arrangements with the selected training institution. The contractor provided orientation to study in the U.S. and debriefed trainees upon his/her return to Jamaica.

Short Term Participant Training

Summary data on short-term participant training is presented in Table 3. To date, 27 individuals have participated in training programs or observational tours abroad. Of these, 16 or 59% have left the project or will be leaving in the near future. Should NFED, SDC and VTDI be formally removed from the project this figure will increase. Detailed information on the type and duration of overseas training and the current project related status of each participant is presented in Appendix E.

TABLE 3. SHORT TERM PARTICIPANT TRAINING BY AGENCY

AGENCY	PERSON MONTHS	NUMBER OF TRAINEES
VTDI	7.00	4
MYCD	4.75	8
SDC	1.75	4
Stony Hill	9.00	3
Portmore	4.00	3
JIDC/Garmex	2.75	5
Kennilworth	0.00	0
TOTAL	29.25	27

Long Term Participant Training

Five individuals have participated in long term training programs. All of the long term trainees received bachelors degrees and one also completed work on a masters degree. Long term participant trainees were interviewed in order to determine the extent to which they were utilizing the knowledge and skills acquired during their training in their current positions. Hector Lawrence, Principal of VTDI, received a bachelors degree in Vocational Education. Prior to his training he was Deputy Director of NFED. Shortly after his return to Jamaica he was transferred to VTDI. Mr. Lawrence stated that he felt that his training has been very useful in his current position, especially the exposure that it provided to vocational training systems and institutions in the United States. Zephaniah Muschette, Acting Coordinator of the Curriculum Development Unit at VTDI, received a bachelors degree in vocational education and curriculum development. He states that his training has been very useful and that he has attempted to structure the curriculum development efforts of VTDI along the lines of the training that he received. Winston Pagon, National Director of Youth Camps and Academies at SDC received a bachelors degree in technical educational and vocational administration. He feels that he did not have enough opportunity to use the administrative skills that he acquired before the academies were transferred to the HEART Trust. Dick Allison, Chief Vocational Training Instructor at

VTDI received bachelors and masters degrees in vocational educational methods and instructional techniques. He does not feel that he has had the opportunity to utilize the knowledge and skills that he acquired in his overseas training because, upon return to Jamaica, he assumed the same position and duties that he had prior to his training. Eric Swaby, Deputy Manager, Administrative Support Services, Portmore Academy received a bachelors degree in vocational education. He was identified for participant training while serving as Deputy Coordinator of Training at SDC. He was transferred to Portmore approximately six months after his return to Jamaica. His present position does not allow him to make direct use of his vocational education training. However, to the extent that he attends senior management meetings and is able to influence the direction of vocational education at Portmore, he feels that his training has been useful. He is able to provide input at the meetings, especially with respect to the use of competency based curriculum. During his training he spent six weeks at Keystone Training Center and feels that this experience was far more relevant to his present position than his formal training in that it gave him exposure to the administration of a skills training center.

In-Service Training

Project documents stipulated that in-service training was to be provided to project related personnel in administration and management; testing, monitoring/inspecting; tracer studies; and curriculum and materials development and adaptation. To date 35 workshops have been conducted for a total of 501 hours of in-service training. Six hundred seventy-three (673) individuals from HEART Trust; VTDI; SDC; NFED; MYCD; MOE; MOT; JIDC; Stony Hill; Portmore; Garmex; Mico Teachers College; the University of the West Indies; and technical and secondary schools have participated. Summary information on in-service training is provided in Table 4. A detailed listing of all in-service training provided to date is presented in Appendix F.

TABLE 4. IN-SERVICE TRAINING BY CATEGORY OF TRAINING

CONTENT	# of Hours	# of Participants
Curriculum Development	279	504
Counselling	68	24
Testing	60	15
Administration/Management	30	61
Equipment	6	12
Computer Literacy	52	45
Pedagogy	6	12
TOTAL	501	673

IX. PROCUREMENT SERVICES TO DATE

RCA/GE has assisted in the identification of equipment needs, development of equipment specifications, scheduling of procurement and installation of innovative equipment. Rationalization of existing equipment has not occurred, i.e. all innovative equipment supplied to the non-formal skills training sector has been new. RCA/GE has also provided oversight to determine if basic equipment ordered by Ronco was appropriate and if specifications were correct.

As a condition precedent to procurement the GOJ must submit satisfactory evidence to US/AID that the construction or renovation of the respective building in which such materials or equipment are to be housed is at least sixty percent (60%) completed and that an adequate property control and usage system is in place. P.I.L. #4, dated September 10, 1984 certified renovations at Portmore Academy to be 60% complete. RCA/GE assisted in the development of the innovative equipment list for this academy. This innovative equipment list was submitted to the Procurement Committee on August 14, 1986. Questions concerning items included on the list, particularly the number of computers requested, have delayed final approval. To date the only piece of innovative equipment ordered for Portmore Academy has been a transformer. This item is in place at the academy. At present, the academy is operating with the basic equipment supplied through Ronco.

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P.I.L. #6, dated May 15, 1985 certified Stony Hill as 95% complete on condition that proper security measures be installed. Installation of these security measures has been completed. Approval was granted for the first set of innovative equipment for Stony Hill on August 8, 1988. Approval for purchase of a standby generator has also been granted. A second list of innovative equipment for Stony Hill Academy is currently under review.

P.I.L. # 19, dated March 20, 1987, certified renovations and security proofing at TMRC to be 90% complete. The ceiling in the renovated building subsequently collapsed, but has since been repaired. The complete innovative equipment list for TMRC was not approved. To date the following innovative equipment has been ordered and is in place at the center: three sets of curricula, books and a xerox machine.

RCA/GE has been asked to assist in the procurement of innovative equipment for Garmex and innovative and basic equipment for Kenilworth. Procurement assistance to these academies will be discussed in the HEART Trust component of the data gathering exercise as the HEART Trust was responsible for the administration of these academies when procurement services were provided.

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APPENDIX A

Original

SCOPE OF SERVICE: NON-FORMAL SKILLS TRAINING SPECIALIST

- A. Assist with the planning, policy-making and development of fifteen H.E.A.R.T. Academies with primary emphasis on the four academies being assisted under this project.
- B. Assist with H.E.A.R.T. Academies' budget preparation and financial management.
- C. Design and implement training programmes for instructors at the four H.E.A.R.T. Academies within the Project.
- D. Provide technical direction in the development of curricula and appropriate instructor training programmes based on regular assessments of possible employment generation schemes.
- E. Develop a system for recruitment, enrollment, job placement, counselling and follow-up of the trainees.
- F. Assist in the selection and development of non-formal adult education programmes for the 20-30 year old age group in evening programmes at the educational facilities of the H.E.A.R.T. Academies.
- G. Foster the participation of the private sector in the administration and management of skill training activities within the H.E.A.R.T. Academies.
- H. Serve as a major resource person in non-formal skills training and management for the senior officers of the MYCD.

APPENDIX A

Revised

SCOPE OF SERVICES: MANAGER, TECHNICAL OPERATIONS

RATIONALE:

To ensure more effective and efficient co-ordination and completion of RCA responsibilities in relation to the formal and non-formal components of the Jamaica Basic Skills Training Project, the following Scope of Services are the responsibilities of the Manager, Technical Operations.

I. FORMAL

- a. Design and implement an appropriate Training Plan. The Plan will include:
 - 1) participant training abroad for key counterparts in combination study/observation programmes;
 - 2) in-service training through short-term courses, seminars and workshops, in administration and management, teaching, materials development and adaptation;
 - 3) upgrading the Technical Education Training Programme at CASI.
- b. Provide technical direction in developing and implementing an effective school administration/management plan. The contractor shall work with the MOE to determine how organizational structure and skills can be strengthened to improve the technical High School system. This will involve activities such as: evaluation of the organizational structure; definition of functions, duties and responsibilities; development of staffing patterns; staff development; facility management; admission system; record keeping; inventory control; relationships to the MOE and other institutions.
- c. As required, assist the MOE in budget planning, cost/benefit analysis and general financial management of the system.
- d. Provide technical assistance in long-range planning and policy-making decisions for the upgrading and physical expansion of the ten technical High Schools. The contractor will be responsible for determining commodity needs, the writing of detailed specifications, procurement and supervision of equipment installation. (Commodity lists are to be submitted through the Contractor to the USAID Project Officer for review prior to initiation of procurement).
- e. The Contractor shall review the MOE's recent course structure and curricula and advise of appropriate available alternative instructional technologies, assisting in the selection and development of the most appropriate programme for its needs.

Develop detailed course designs and appropriate curricula as required.

- f. Work with MOE and the private sector to develop effective Private Sector Advisory Committee, which will play an important role in linking the training activities of the schools with the needs of employers. Although an advisory body, the committees would influence training policy through their recommendations, participation in planning and review of programmes.
- h. The contractor will actively participate in project review conducted semi-annually during the life of the project with all implementing agencies and USAID. The contractor will also participate and assist in the project evaluations conducted every two years.

II. NON-FORMAL

- a. The contractor shall ensure non-duplication of effort, maximum use of curriculum resource and articulation between formal and non-formal instructional programmes as appropriate.
- b. Provide technical assistance in developing and implementing an effective H.E.A.R.T. Academies Administrative Procedures Manual.
- c. Provide technical assistance in the management of the H.E.A.R.T. Academies.
- d. Provide technical assistance in the establishment of the Training Materials Resource Centre at VTDI.
- e. Coordination of local and overseas staff development programmes to maximise use of technical assistance and training resources.
- f. Serve as a major resource person in non-formal skills training.
- g. Assist in promoting private sector support for the non-formal manpower development programmes.
- h. Provide technical assistance in the management of the H.E.A.R.T. Academies.
- i. Develop commodity needs, develop specifications, and supervise installation of equipment.

APPENDIX B

SCOPE OF SERVICE: CURRICULUM DEVELOPMENT SPECIALIST

1. Develop a long range institutional development plan for instructional materials and curricula development for the resource center at VTDI.
2. Design a programme for adaptation of existing instructional materials and curricula to meet Jamaica's needs, including printed and audio/visuals and other subject areas such as life coping skills, work attitudes, training for self-employment, etc.
3. Develop strategies, including workshops for the dissemination of non-formal skills training instructional materials and curricula to H.E.A.R.T. Academies, evening programmes at technical high schools, and private and public sector training institutions.
4. Prepare teacher orientation materials and workshops to introduce new skills training instructional materials and curricula.
5. Collaborate with private and public sector training institutions and short-term instructional materials/curriculum development specialists in the development of materials/curricula and in conducting field studies and evaluations of the new curriculum implementation process.

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APPENDIX C

Short Term Technical Assistance by Year
and Category of Assistance

<u>1985</u>	Person Months
Curriculum Development	1.80
Management	<u>0.70</u>
Sub-total	2.50
<u>1986</u>	
Curriculum Development	21.25
Monitoring	4.00
Placement	1.40
Management	<u>1.00</u>
Sub-total	27.65
<u>1987</u>	
Curriculum Development	7.30
Tracer Studies	7.00
Counselling	3.50
Management	2.70
Food Service	<u>1.24</u>
Sub-total	21.45
<u>1988</u>	
Testing	6.00
Management	<u>7.00</u>
Sub-total	13.00
	=====
TOTAL	64.90

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: AVANI

DATE RECOMMENDED: November 28, 1985

DATE APPROVED BY USAID: December 11, 1985

DURATION OF CONSULTANCY: January 26, 1986 - April 30, 1986

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: VTDI

ACHIEVEMENTS: Develop and adapted CBE curriculum materials for Secretarial, Sales, and Business Data Processing; conducted in-service training sessions for the Stony Hill Academy and help to develop equipment specifications for innovative equipment for the Stony Hill Academy; worked closely with MOE, visiting the schools island-wide.

IMPLEMENTATION STATUS: Teachers guides being used in technical high schools but not at Stony Hill.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Bryant

DATE RECOMMENDED: May 3, 1985

DATE APPROVED BY USAID: May 10, 1985

DURATION OF CONSULTANCY: October 21 - November 19, 1986

MINISTRY/AGENCY ASSIGNED: Portmore/Stony Hill

MINISTRY/AGENCY CHARGED: MYCH

ACHIEVEMENTS: Drafted a Code of Regulations for use in the academies

IMPLEMENTATION STATUS: Code of regulations proposed by technical advisor has not been formally adopted. A series of meetings has been held to modify TA's report. Operations manual has been developed from code of regulations. Training on the manual is currently underway at Stony Hill and scheduled to begin in August, 1988 at Portmore. Work to adapt the code of regulations is underway at Garmex.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Dillon

DATE RECOMMENDED: March 28, 1985

DATE APPROVED BY USAID: April 30, 1985

DURATION OF CONSULTANCY: May 6 - 31, 1985

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHAIR: VTDI/MYCD

ACHIEVEMENTS: Met with personnel at HEART, MOE, VTDI and MYCD to get information on their curriculum needs.

IMPLEMENTATION STATUS: Not applicable, information gathering only

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Dillon

DATE RECOMMENDED: July 8, 1985

DATE APPROVED BY USAID: August 13, 1985

DURATION OF CONSULTANCY: January 19 - February, 1986

MINISTRY/AGENCY ASSIGNED: VIDI

MINISTRY/AGENCY CHARGED: VTDI/MYCD

ACHIEVEMENTS: Assisted in refining task listings in business practices, masonry, welding and building repair curricula.

IMPLEMENTATION STATUS: Task listings in business practices, masonry, welding and building repair not currently in use.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Dillon

DATE RECOMMENDED: April 29, 1986

DATE APPROVED BY USAID: July 17, 1986

DURATION OF CONSULTANCY: August 9 - 23, 1986

MINISTRY/AGENCY ASSIGNED: MYCD

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Developed Trainee Instructions Packages (TIPs) for Maths and English. Conducted CBVE workshops at Portmore, Stony Hill and Garmex.

IMPLEMENTATION STATUS: Tips for maths and English currently in use at Portmore and Stony Hill

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Eaddy

DATE RECOMMENDED: February 6, 1986

DATE APPROVED BY USAID: February 13, 1986

DURATION OF CONSULTANCY: March 23 - October 3, 1986

MINISTRY/AGENCY ASSIGNED: MYCD

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Developed PIO/Ps for JIDC staff for overseas training.
Conducted personnel audit of MYCD/NFED, SDC, VTDI staff involved in the
Project to determine training needs.

IMPLEMENTATION STATUS: Training needs assessment utilized, but to
limited degree given staff turnover.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Gilley

DATE RECOMMENDED: July 23, 1987

DATE APPROVED BY USAID: July 30, 1987

DURATION OF CONSULTANCY: August 4, 1987 - March 31, 1988

MINISTRY/AGENCY ASSIGNED: HEART Trust

MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Conducted training sessions in CBVE for Stony Hill and VTDI instructors; assisted in the planning of the pilot test of the CBVE clerk/typist curricula.

IMPLEMENTATION STATUS: Pilot test of CBVclerk/typist curricula now in progress at Stony Hill.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Gooden

DATE RECOMMENDED: July 31, 1986

DATE APPROVED BY USAID: August 28, 1986

DURATION OF CONSULTANCY: February 16 - April 3, 1987
May 11 - June 30, 1987

MINISTRY/AGENCY ASSIGNED: Stony Hill

MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: A special Data Entry Certificate has been agreed upon. Curriculum has been updated and re-written and a list of assessment criteria drawn up.

IMPLEMENTATION STATUS: Data entry certificate being used; curriculum assessment criteria being used.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Harrington

DATE RECOMMENDED: August 11, 1987

DATE APPROVED BY USAID: September 4, 1987

DURATION OF CONSULTANCY: October - December, 1987

MINISTRY/AGENCY ASSIGNED: VTDI and HEART Trust

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Determined the status of curriculum materials in the building trades and clerical areas developed at VTDI; provided assistance in organizing the pilot test of the CBVE Clerk/Typist curriculum at Stony Hill; assessed curriculum development procedures and capabilities at VTDI/TMRC; developed guidelines for coordination of curriculum development efforts by the Training Division of the HEART Trust.

IMPLEMENTATION STATUS: Consultancy to complete procedural manual to end in August, 1988. Recommendation that curriculum development be shifted to HEART is still pending.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Jaffe

DATE RECOMMENDED: January 15, 1985

DATE APPROVED BY USAID: November 8, 1985

DURATION OF CONSULTANCY: October 7 - 20, 1985; November 7 - 21, 1985;
December 10 - 21, 1985

MINISTRY/AGENCY ASSIGNED: VTDI and HEART Trust

MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Provided technical assistance on how to activate and implement residential skills training centers; provided assistance in the area of trainee testing.

IMPLEMENTATION STATUS: Recommendations on physical facilities at Portmore implemented. Trainee testing, exiting procedures, role of counsellors, interview schedules for trainees implemented. Recommendation on use of round tables for dining halls not implemented.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Teape-Johnston

DATE RECOMMENDED: March 25, 1987

DATE APPROVED BY USAID: March 26, 1987

DURATION OF CONSULTANCY: March - June, 1987

MINISTRY/AGENCY ASSIGNED: HEART Trust

MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Conducted tracer studies on trainees. Analysis of data and tables for each institution and program; summary made of the results of the tables.

IMPLEMENTATION STATUS: Not applicable; data gathering exercise only.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: F. Johnston

DATE RECOMMENDED: September 12, 1985

DATE APPROVED BY USAID: October 22, 1985

DURATION OF CONSULTANCY: January 13 - April 10, 1986

MINISTRY/AGENCY ASSIGNED: MYCD

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Developed and presented to the HEART Trust a first draft of the procedures Manual for the FAMCs; conducted 9 training workshops in Budgeting and Planning using presenters from the public and private sectors. Submitted a training report. An edited version of each presentation put together in a manual to be used for training by the HEART Trust.

IMPLEMENTATION STATUS: Draft manual submitted to HEART. No further action taken.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: F. Johnston
DATE RECOMMENDED: June 23, 1986
DATE APPROVED BY USAID: July 3, 1986
DURATION OF CONSULTANCY: August 9, 1986 - March 27, 1987
MINISTRY/AGENCY ASSIGNED: MYCD
MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Reviewed accounting system of MYCD/SDC as they relate to the HEART Trust; conducted training sessions in Planning and Budgeting for personnel at SDC, VTDI, JIDC and the academies; developed a procedures manual for Financial Management and Control System as part of the institutionalization of the HEART Trust.

IMPLEMENTATION STATUS: Procedures manual submitted in draft form to HEART; manual was to be completed by HEART.

July 22, 1987 - RCA/GE requested information on current status of manual. No response received from HEART.

November 9, 1987 - RCA/GE made second request to HEART for status report on manual. To date, HEART has not responded to the request for information.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: M. Johnston

DATE RECOMMENDED: May 3, 1985

DATE APPROVED BY USAID: May 10, 1985

DURATION OF CONSULTANCY: August 25 - October 17, 1986

MINISTRY/AGENCY ASSIGNED: MYCD

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Worked with staff of Portmore and Stony Hill in setting up counselling workshops and counselling procedures.

IMPLEMENTATION STATUS: Undetermined

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: M. Johnston

DATE RECOMMENDED: September 12, 1986

DATE APPROVED BY USAID: October 10, 1986

DURATION OF CONSULTANCY: October 27 - November 30, 1986

MINISTRY/AGENCY ASSIGNED: JIDC/Garmex

MINISTRY/AGENCY CHARGED: JIDC

ACHIEVEMENTS: Conducted training sessions in counselling for Academy staff.

IMPLEMENTATION STATUS: Student orientation to residential training, selection of training courses, informational face sheets on each trainee are being utilized. Recommendation that trainees and counsellors observe industries has been implemented.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Kendrick

DATE RECOMMENDED: May 27, 1985

DATE APPROVED BY USAID: July 1, 1985

DURATION OF CONSULTANCY: August 9 - September 6, 1985

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: VTDI

ACHIEVEMENTS: Developed 8 TIPs; revised masonry/steel fixing equipment lists to include equipment required by all modules. Located equipment catalogues and wrote specifications for part of tool and equipment lists.

IMPLEMENTATION STATUS: The 8 TIPs in masonry/steelfixing developed by the consultant are not being used.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Lawson

DATE RECOMMENDED: July 22, 1987

DATE APPROVED BY USAID: August 18, 1987

DURATION OF CONSULTANCY: April 1, 1987 - August 31, 1988

MINISTRY/AGENCY ASSIGNED: Garmex

MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Developed Academy Operations Manual

IMPLEMENTATION STATUS: Training now being conducted on implementation of operations manual at Portmore, Stony Hill and Garmex

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Lawson
DATE RECOMMENDED: July 23, 1987
DATE APPROVED BY USAID: August 18, 1987
DURATION OF CONSULTANCY: September 1987 - March 31, 1987
MINISTRY/AGENCY ASSIGNED: SDC
MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Developed Academy Operations Manual

IMPLEMENTATION STATUS: Training now being conducted on implementation of operations manual at Portmore, Stony Hill and Garmex.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Leshko
DATE RECOMMENDED: May 3, 1985
DATE APPROVED BY USAID: May 10, 1985
DURATION OF CONSULTANCY: May 13 - 24, 1985; July 16 - 31, 1985;
September 10 - 17, 1985
MINISTRY/AGENCY ASSIGNED: MYCD/SDC
MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Conducted a survey of staff development needs at SDC and the academy level; results of needs assessment survey used as a guide for sequencing and clustering proposed training topics; held discussions with SDC officials on a plan of action to facilitate preparation of Manual; arrangements made for two three day Basic Management training program for HEART Trust's professional staff.

IMPLEMENTATION STATUS: Staff assessment needs survey utilized by SDC. Work continued on consultants manual of Academy Operations.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Lynch

DATE RECOMMENDED: April 30, 1985

DATE APPROVED BY USAID: May 10, 1985

DURATION OF CONSULTANCY: June 24 - December 20, 1985
January 27 - May 2, 1986

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: MOE

ACHIEVEMENTS: One hundred fifty two (152) TIPs written; supervised the finalization and production of automotive CBE curriculum materials; conducted curriculum review sessions and visited all the Technical High Schools to present samples of the curriculum to the instructors and to evaluate their facilities and equipment.

IMPLEMENTATION STATUS: TIPs in automechanics being used at MOE and JAGAS.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: McMinn

DATE RECOMMENDED: March 28, 1985

DATE APPROVED BY USAID: April 30, 1985

DURATION OF CONSULTANCY: June 3 - 21, 1985

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: VTDI

ACHIEVEMENTS: Analyzed VTDI's printing and photography equipment needs; reviewed VTDI's printing and photography capability including space and layout; made specific recommendations for updating the VTDI print and photography shop; wrote specifications for printing, binding, collating and photography equipment; set up a management and supplies inventory system to assure efficient operations.

IMPLEMENTATION STATUS: Consultants recommendations were not approved and, therefore, not implemented.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: May

DATE RECOMMENDED: September 18, 1986

DATE APPROVED BY USAID: October 30, 1986

DURATION OF CONSULTANCY: November 10 - December 6, 1986

MINISTRY/AGENCY ASSIGNED: MYCD

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Started the establishment of a recruitment/job development/
placement system at the Garmex Academy.

IMPLEMENTATION STATUS: Undetermined

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Morgan

DATE RECOMMENDED: July 8, 1986

DATE APPROVED BY USAID: N/A

DURATION OF CONSULTANCY: August 24 - October 10, 1986; October 10 - November, 1986
January 19 - March 11, 1987

MINISTRY/AGENCY ASSIGNED: Stony Hill

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Secured textbooks in typewriting and accounting; facilitated implementation of CBVE in English, Maths, Typewriting and Accounting; installed a system for proper testing and record keeping of trainee progress and designed a brochure on CBVE for the Stony Hill Academy.

IMPLEMENTATION STATUS: Materials that consultant brought have been further adapted and are currently in use in pilot test of CBVE at Stony Hill.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Porterfield
DATE RECOMMENDED: February 5, 1986
DATE APPROVED BY USAID: March 3, 1986
DURATION OF CONSULTANCY: March 9 - May, 1986
MINISTRY/AGENCY ASSIGNED: MYCD
MINISTRY/AGENCY CHARGED: HEART Trust

ACHIEVEMENTS: Prepared a procedures manual on equipment maintenance and control which was accepted by US/AID. This was condition precedent of the Project.

IMPLEMENTATION STATUS: System developed by consultant used for all inventory exercised at MYCD.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Porterfield
DATE RECOMMENDED: April 10, 1986
DATE APPROVED BY USAID: May 5, 1986
DURATION OF CONSULTANCY: June - November, 1986
MINISTRY/AGENCY ASSIGNED: VTDI
MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Curricula for painting and decorating, carpentry, masonry, welding and plumbing developed; submitted a revised assessment of the facilities at the Stony Hill and Portmore academies.

IMPLEMENTATION STATUS: Carpentry, plumbing, masonry, welding, painting and decorating curricula are not being used.

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Ruddock

DATE RECOMMENDED: November 28, 1985

DATE APPROVED BY USAID: December 11, 1985

DURATION OF CONSULTANCY: February 10 - April 10, 1986

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: VTDI

ACHIEVEMENTS: Developed CBE curriculum for civics; conducted in-service training workshops for instructors in the use of CBE curriculum.

IMPLEMENTATION STATUS: Civics curriculum currently in use

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Stewart

DATE RECOMMENDED: November 28, 1985

DATE APPROVED BY USAID: December 11, 1985

DURATION OF CONSULTANCY: March 19 - May, 1986

MINISTRY/AGENCY ASSIGNED: VTDI

MINISTRY/AGENCY CHARGED: VTDI

ACHIEVEMENTS: Developed CBE curriculum in Family Life Education

IMPLEMENTATION STATUS: Curriculum materials are currently in use.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Storm

DATE RECOMMENDED: October 13, 1987

DATE APPROVED BY USAID: November 2, 1987

DURATION OF CONSULTANCY: November, 1987 - April, 1988

MINISTRY/AGENCY ASSIGNED: HEART Trust

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Conducted a ten day workshop with participants from VTDI, SDC, HEART Trust and Portmore Academy; identified competencies to be measured; developed test specifications.

IMPLEMENTATION STATUS: Proficiency tests not currently in use. Determination of how best to utilize tests is awaiting review of cost considerations in test administration.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Tapper
DATE RECOMMENDED: July 23, 1987
DATE APPROVED BY USAID: November 10, 1987
DURATION OF CONSULTANCY: November - December, 1987
MINISTRY/AGENCY ASSIGNED: MYCD
MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Conducted training sessions for training kitchen staff at Portmore and Stony Hill Academies; submitted a detailed report which contained recommendations for improving the existing situation at both academies.

IMPLEMENTATION STATUS: Recommendations regarding sanitation and hygiene; defective kitchen equipment; and human relations aspects of kitchen staff/trainee relationships implemented. Recommendation that trainees discontinue kitchen duty not accepted as it was felt that this was part of the training experience.

APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: McClennan, Powell, Parkins

DATE RECOMMENDED: August, 1986

DATE APPROVED BY USAID: September 3, 1986

DURATION OF CONSULTANCY: August 29 - December 15, 1986

MINISTRY/AGENCY ASSIGNED: Portmore

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Assisted Porterfield in curriculum development

IMPLEMENTATION STATUS: Curriculum not in use

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APPENDIX D

Short Term Technical Advisors
Information Sheet

CONSULTANT: Lurch, Dally

DATE RECOMMENDED: N/A

DATE APPROVED BY USAID: July 29, 1986

DURATION OF CONSULTANCY: N/A

MINISTRY/AGENCY ASSIGNED: Stony Hill

MINISTRY/AGENCY CHARGED: MYCD

ACHIEVEMENTS: Assisted consultants Morgan and Avani in curriculum development.

IMPLEMENTATION STATUS: See Morgan, Avani information sheets

APPENDIX E

Short Term Participant Training

Name of Participant	Agency	Category of Training	Person Months of Training	Current Project Status
E. Hamilton	Portmore	Job Placement and Counselling	2.00	Placement Officer, Portmore
S. Braham	VTDI	Curriculum Adaptation and Development	2.00	No longer connected to project
H. Watson	VTDI	Vocational Education - Management & Supervision	2.00	No longer connected to project
E. Christie	Portmore	Vocational Education - Management & Supervision	1.00	Deputy Manager for Technical Programmes, Portmore
A. Lurch	VTDI	Curriculum Adaptation and Development	2.00	Deputy Coordinator of Curriculum Development Unit, VTDI
D. MacLean	Portmore	Counselling/Residential Living	1.00	H.E.A.R.T. LEAP project
I. Nikki	Stony Hill	Counselling/Residential Living	1.00	No longer connected to project

APPENDIX E

Short Term Participant Training

Name of Participant	Agency	Category of Training	Person Months of Training	Current Project Status
C. McCulloch	MYCD	Attend A.V.A Visit Atlanta area Technical School for instructional materials.	1.00	No longer connected to project
Q. Francis	MYCD	Attend A.V.A., 1986 Visit Atlanta area Technical school for instructional materials	1.00	No longer connected to project
W. Leiba	MYCD	Attend A.V.A., 1986	0.25	No longer connected to project
E. Lewis	SDC	Attend A.V.A., 1986	0.25	Executive Chairman SDC
L. Henry	JIDC/ Garmex	Attend A.V.A., 1986	0.50	No longer connected to project
D. Boothe	JIDC/ Garmex	Observe apparel industry training center	0.50	Deputy Manager for technical Projects, Garmex
L. Henry	JIDC/ Garmex	Observe apparel industry training center	0.50	No longer connected to project

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APPENDIX E

Short Term Participant Training

Name of Participant	Agency	Category of Training	Person Months of Training	Current Project Status
V. Scantlebury	JIDC/ Garmex	Observe apparel industry training center	0.50	No longer connected to project
Q. Francis	MYCD	Attend A.V.A., 1984 Visit State Dept of VTE and Curriculum Centers	0.50	No longer connected to project
C. McCulloch	MYCD	Attend A.V.A., 1984 Visit State Dept of VTD and Curriculum Centers	0.50	No longer connected to project
E. Lewis	SDC	Observe residential centres	0.25	Executive Chairman, SDC
C. McCulloch	MYCD	Attend A.V.A., 1983	0.50	No longer connected to project
Q. Francis	MYCD	Attend A.V.A., 1983	0.50	No longer connected to project
H. Lawrence	MYCD	Observe residential centers	0.50	Principal, VTDI
C. Dash	SDC	Observe residential centers	0.50	Director of Finance and Administration, SDC

APPENDIX E

Short Term Participant Training

Name of Participant	Agency	Category of Training	Person Months of Training	Current Project Status
L. Fowler	JIDC	In-service training on counselling in Puerto Rico	0.75	No longer connected to project
J. Mars	SDC	Curriculum Adaptation and Development	0.75	Training Officer, SDC
M. McIntosh	Stony Hill	Curriculum Adaptation and Development	3.00	Will be leaving shortly
C. Granston	Stony Hill	Curriculum Adaptation and Development	3.00	No longer connected to project
V. Angus	Stony Hill	Curriculum Adaptation and Development	3.00	Stony Hill Academy

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APPENDIX F

In-Service Training

Non-Formal Skills Training Sector

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
Sept. 11, 1985	Muschette Harrington	Analysis of VTDI curriculum guides, developing TIPS, Revising Task Lists	M.O.A.	developers supervisors	8	4
Sept. 3-13, 1985	Muschette Harrington	Analysis of TIPS TIP Development	MOE	officers	9	72
Sept. 4, 1985	Harrington	Developing Task list, developing TIPS, use TIPS	H.E.A.R.T.	writers	2	8
May 22, 1985	Muschette Harrington	Use of TIPS	MOE	officers	13	6
Mar. 11, 18 27, 1985	Butterfield Muschette Harrington	Review of CBVE, VTDI curriculum guides and equipment lists	Stony Hill	Instructors and supervisors	14	18
Feb. 19, 1985	Muschette Harrington	CBVE instruction, writing TIPS	VTDI	writers	8	8
Feb. 12, 1985	Muschette Harrington	CBVE instruction VTDI curriculum guides	Portmore	Instructors and supervisors	20	6

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APPENDIX F

(cont'd)

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
Oct. 31 - Dec. 1, 1986	Johnston, M.	Counselling Workshop/ Seminar and Practicum	Garmex	Counsellors Instructors	10	52
Nov. 4 - 18, 1987	Storm	Proficiency Testing	Portmore, VTDI, H.E.A.R.T., SDC, NFED	Administrators Instructors	15	60
Oct. 1986- March 1987	Johnston, R.	Budgeting and Planning	Portmore, Stony Hill, MYCD, VTDI, JIDC/Garmex RCA HEART	Administrators	61	30
April 10, 12 1987	Weisham	Principles of instruction	Garmex	Instructors	12	6

APPENDIX F

(cont'd)

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
May 12, 1986	Stewart Braham	Inservice teachers on Family Life/Career Skills review completed modules	Portmore Stony Hill	Instructors	9	6
July 28, 29 30, 31 Aug. 1, 1986	N.A.	Development of student modules for commercial skills	Stony Hill	Instructors	12	30
Aug. 5-15, 1986 Aug. 25-Sept. 15 1986	NCR	Computer Literacy	Stony Hill, Portmore, SDC NFED, VTDI	teachers Administrators Curriculum writers	45	52
Summer, 1986	Dillon	Managing Classroom and Laboratory Instruction in Competency Based, self paced programme.	Stony Hill, Portmore, VTDI MOE, HEART		100	29
July 28, 29, 30 31, Aug. 1, 1986	Dalley	Intro to CBE, Review of teacher guides in Commercial skills, writing TIPS, assessment of library, resources at Stony Hill, Orientation VTDI	Stony Hill	Instructors	12	20
Sept. 22- 23, 1986	Johnston, M.	Counselling Placement Workshop	Stony Hill Portmore	Counsellors Administrators	14	16

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APPENDIX F

(cont'd)

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
Mar. 21, 1986	Ruddock Watson	Presentation of Civics Module #1, use by trainees.	Portmore	Teachers trainees	24	4
April 2, 1986	Harrington Stewart Braham	Review topic, Listing of Family Life/ Career Skills Curriculum use of booklet on family budgets.	VTDI, Stony Hill, Portmore	Instructors	14	4
April 7, 1986	Avani Dalley Williams	Implementation of commercial skills curriculum developed at VTDI	Stony Hill	Instructors	20	6
April 8, 1986	Avani Dalley Williams	Implementation of Commercial skills curriculum developed at VTDI	MOE, tech. high schools secondary schools	Instructors	33	6
April 10, 1986	Harrington Braham Stewart	Review topic listing and three completed booklets on family life education	VTDI, HEART SDC, UWI, MYCD Stony Hill, Portmore	Instructors	12	5
May 8, 1986	Porterfield	Guideline for Operation of Equipment Control Maintenance and Repair	SDC, NEED Garmex, Portmore	N/A	12	6

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APPENDIX F

(cont'd)

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
Feb. 25, 1986	Ruddock Watson	Review of Civics tasks review of modules format	Stony Hill	Teachers	6	4
Feb. 26, 1986	Avani Dalley	Presentation of curriculum modification process, job titles, format for secretarial and account- ing/computing	HEART, SDC, MOE	Professionals	15	2
Mar. 4, 1986	Ruddock Watson	Review of Civics tasks Review of module formats	Portmore	Teachers Administrators	2	4
Mar. 12, 1986	Ruddock Watson	Testing of Civics module #5, Lesson #1	Stony Hill	Teacher and trainees	32	6
Mar. 13, 1986	Ruddock Watson Harrington Lurch Weishan	Civics task lists and 5 modules reviewed	Stony Hill, MYCD, HEART, Portmore, SDC, UWI, STHS, Mico	Professionals	9	4
Mar. 18, 1986	Ruddock Watson	Testing of Civics Module #1, Lesson #9	Stony Hill	Teachers, trainees	28	4

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APPENDIX F

(cont'd)

Date	Instructor	Content	Participating Organizations	Level of Participants	No. of Participants	No. of Hours
Jan. 17, 1985	Harrington	Up-date on task analysis Up-date on TIP process	HEART Trust MOT, Resort Skills Committee	Advisory	14	2
Jan. 30, 1986	Dillon Braham Watson Harrington	Gather input on lists, share curriculum development plan	Stony Hill	Teachers	6	4
Jan. 30, 1986	Avani Harrington Dally Lurch	Presentation of task lists from staff, agenda for curriculum development	Stony Hill	Teachers	20	3
Feb. 6, 1986	Dillon Watson Harrington	Input received on draft of sample module, CBVE presentation and discussion	Stony Hill	Teachers	6	4
Feb. 10, 1986	Dillon Braham Watson Lurch	Diagnostic student testing in Math and English	Stony Hill	Trainees	24	4
Feb. 11, 1986	Dillon Braham Watson	Explanation of diagnostic test scores, explanation of CBE and individualized instruction. Use of Math and English modules with trainees.	Stony Hill	Trainees Teachers Administrators	32	6

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A REVIEW OF THE MINISTRY OF EDUCATION COMPONENT
OF THE BASIC SKILLS TRAINING PROJECT
(PROJECT NO. 532-0083)

Submitted to: Dr. William Charleson
Director, OEHR/U.S.A.I.D.
Submitted by: Mary Nerbonne

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A REVIEW OF THE MINISTRY OF EDUCATION COMPONENT
OF THE BASIC SKILLS TRAINING PROJECT

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Statement of Purpose

The purpose of this report is to document the work of RCA on the Ministry of Education (MOE) component of the Basic Skills Training Project (Project No. 532-0083). Relevant documents have been reviewed to determine precisely the services which RCA was contracted to provide on the MOE component. This report will document the planned services, as stipulated in the Project Paper, the Request for Proposals, the RCA response Proposal and relevant work requests, and compare these planned services with the services delivered by RCA, including services which RCA was not expressly asked to perform/deliver.

Conclusions and recommendations regarding the contractor's work on the Basic Skills Training Project are beyond the scope of this review. The main purpose of the review is to provide a summarized record of the contractor's services for reference by an evaluation team.

Methodology

The project documentation has been the primary source of information for this review. Visits to Technical High Schools were originally anticipated, but time constraints precluded any site visits. The relevant project documents include (but are not limited to): the Project Paper (PP); the Request for Proposals (RFP); the RCA Proposal; the Project Agreement and amendments to it. In addition, RCA, MOE and U.S.A.I.D. project documents have been referenced, including meeting minutes, consultants' reports, weekly and monthly reports of the contractor, internal reviews conducted by U.S.A.I.D., and a variety of other documents.

In addition to the document review, interviews have been conducted with project staff: U.S.A.I.D. staff, including the Basic Skills Training Project Officer; the RCA Consultant assigned to the Ministry of Education (MOE); RCA home office and local staff; and Basic Skills Training Project staff at the Technical Vocational Unit (TVU) of the MOE.

Introduction

The Basic Skills Training Project (BSTP), which was formally initiated on September 19, 1984, grew out of a desire on the part of U.S.A.I.D. to assist the Government of Jamaica (GOJ) to establish both "an improved skill-training system responsive to the GOJ's economic policies and labor market needs," and "a trained human resource base" (PP, p.8). The Project Paper for the BSTP provides a succinct summary of the aim of the Formal Skills Training (MOE) component of the project:

"This component focuses on the need to upgrade and expand the facilities, equipment, management and instructor training necessary for delivering a viable, flexible, and expanded formal program of technical level skill training.

This activity will be implemented through the Ministry of Education in a phased and regularly monitored mode over the life of the project." (PP, p.15)

Project Paper Specifications

Five basic approaches to assist the formal skill training (MOE) component of the project are described in Section iii of the PP. These may be summarized as follows: (1) Seven Technical High Schools to be rejuvenated and three other High Schools to be upgraded to Technical High Schools; (2) Innovative Technology and Materials to be introduced into the Schools; (3) Training in Administration and Management of the Schools and Instructional Laboratories to be provided; (4) Personnel Training; (5) Private Sector Advisory Committees to be developed. [Specific numbers of people to be trained under these categories of assistance are included in the Logical Framework section (Annex B, pps. 5-6, under Component C) of the PP.]

The complete description of contractor services, as delineated in Section iii of the PP (pages 16-18), is included in Appendix A of this report. The services, derived from this section of the PP and outlined below, provide a basis for comparison with the services that have been delivered by RCA under the MOE component of the project. They are are grouped under the MOE division to which they pertain:

A. The Technical Vocational Unit (TVU):

1. Provide operating equipment (duplicating, audio-visual and photo equipment);
2. Upgrade training materials resource center at the TVU;
3. Inservice training for personnel

B. The Technical High Schools (THS):

1. Renovation and upgrading of the physical facilities (several schools to be assisted in each of three phases)
2. Renovation and upgrading of equipment;
3. Procurement of additional new equipment and machinery;
4. Instructional areas made secure form theft and vandalism;
5. Innovative technology and training materials (including teaching aids, work attitude materials, and a basic set of technical reference manuals);
6. Inservice training for personnel in administration and management of the THS (including observation at Vere);
7. Inservice training for personnel involved in teaching and materials development and adaptation;
8. Development of Private Sector Advisory for each THS

C. Mico Teachers' College (MICO)/C.A.S.T.:

1. Moderate upgrading of Industrial Education Teacher Training Program (including development of a career-track program);
2. Plan for recruitment of more students to technical teacher training program;
3. Provide thirty (30) scholarships per year;
4. Participant training in study/observation programs abroad

D. The Private Sector Advisory Committee (PSAC):

1. Assist the MOE to develop effective PSACs to assist the TVU and each THS in the development of curricula, occupational counselling and the placement of THS graduates

The Request for Proposals

A Request for Proposals (RFP), derived from the goals and objectives stated in the PP, was issued for this project on February 22, 1984. Where the PP is a general document (which nonetheless provides essential background information on the purpose and goals of the project), the RFP states the goals and tasks more explicitly. It is to this document (the RFP) that the contractor tailors his response and the subsequent activity based on that response. As it was prepared at a later stage in the planning of the project, and as it served as the point of departure for the contractor, the RFP is a likely starting point for a review of the planned contractor services or "inputs" into the BSTP.

The services to be provided by the contractor (RCA) are more clearly specified and elaborated upon in the RFP stage of the documentation, but the "five basic approaches" described in Section iii of the PP (Appendix A) are essentially carried over to the RFP with only minor modifications. These modifications are noted below and, where appropriate, are reflected in the revised outline of tasks (under the subsections of the report devoted to each organizational component of the Project):

1) Under technology and materials for the THS, the idea of "up-to-date, competency-based instructional teaching aids... utilizing proven effective and readily available instructional materials in the U.S." is introduced. Thus, the contractor had the additional responsibility of providing a particular type and quality of instructional materials.

2) With regard to the TVU, the only change the RFP makes in the contractor's scope of work is in "establishing," rather than "upgrading, as stated in the PP, a "training materials resource unit." The RFP goes on to say, "The development and operation of this unit will be closely coordinated with the similar center to be established at the VTDI (under the non-formal/MYCD component of

the project), in order to avoid duplication of effort and effect mutual compatibility.")

3) Finally, where the PP refers only generally to the services of a "specialist in the management and implementation of Technical High Schools for five years," the RFP delineates the entire scope of services to be provided by this "vocational technical school administration (VTSA) specialist" (See pages 8-10 of the RFP). A list of the "Services of the Vocational Technical School Administration Specialist" is included in Appendix B of this report.

Thus, this report will address the contractor's response to the RFP, i.e., the RCA proposal, and document the services performed by RCA in each of the four organizational components of the MOE: viz., the Technical-Vocational Unit (TVU) of the Division of Planning; the existing Technical High Schools and the schools to be upgraded to Technical High Schools; the Technical Education Teacher Training Program at Mico College; and the Private Sector Advisory Committees. Each component will be examined individually.

Early Stages and Modifications of the BSTP

The dynamic nature of this project must be emphasized at the outset. Very early on it was noted that the skills training system in Jamaica had undergone dramatic changes even since the initial study for the BSTP had begun, some fifteen months before the Project Paper was produced (PP, p.5). Indeed, major deviations from the plan (as laid out in the PP, the RFP, and the RCA response proposal) occurred in every organizational component of the project. The most significant of these are noted below. (Most of the substantive changes which occurred are reflected in Project Implementation Letter #16 of August 6, 1986, which effectively amended the Project Agreement. See Appendix C.)

- A. TVU: The planned upgrading of the TVU to a division within the MOE never took place;
- B. THS: One additional school (Stokes Hall in St. Thomas) was slated to be upgraded to a Technical High School, for a total of four;
- C. MICO: The enhancement of the technical education teacher training program was moved from Mico to the College of Arts, Science, and Technology (C.A.S.T.), and this component of the project shall hereafter be referred to as C.A.S.T.; and
- D. PSAC: The Private Sector Advisory Committees have not yet been formally appointed by the MOE.

Full explanations of these changes appear in the section of the report which addresses the particular organizational component of the project in which the change occurred.

Shared Responsibility for Project Activities and Services

A study of project documents and interviews with the key players in the Project reveal a close working relationship between RCA and TVU staff, and a good deal of shared responsibility for project activities and tasks. Indeed, in a Project of this size and duration (four years), it is often difficult to determine precisely where the responsibility of the contractor ends and the responsibility of Ministry staff begins, and vice versa. As a consequence, even where the contractor did not have express responsibility for a particular aspect of the Project (and even in Project activities that were funded by the GOJ rather than U.S.A.I.D.), RCA staff became involved in order to achieve a necessary end or to enhance the overall impact of the project. [For example, the Project included the goal of renovating and upgrading the physical facilities at (ultimately) eleven schools. This upgrading was funded by the GOJ, and Mr. E. Golding, the MOE's building officer, was responsible for developing plans and securing approval for the renovations. Mr. Clauser, the RCA consultant attached to the Ministry of Education, advised the Ministry on the plans and participated in the post-renovation inspection, (required before any equipment could be ordered) conducted by U.S.A.I.D.]

The example above, then, illustrates why it is necessary to address all project tasks in this report, even those where RCA was asked to provide only perfunctory advise/approval. RCA did play a role in almost all project activities, and in light of this fact of shared responsibility, all aspects of the Basic Skills Training Project must be included in a review of the Project.

A. The Technical Vocational Unit (TVU)

Introduction

The Technical Vocational Unit is a subcomponent of the Planning and Development Division of the MOE, and the upgrading of this unit to a division was a condition precedent of the BSTP (PP, p. 29). At the first meeting of the BSTP Project Management Committee (PMC) on September 24, 1984, the issue of upgrading the TVU to a division was addressed. At that time the Permanent Secretary (PS) made a policy statement on the subject, indicating emphatically that the TVU would remain a unit. At a meeting on November 18, 1985 between the PS, the Chief Education Officer and RCA staff, the role and function of the TVU were again discussed. It was emphasized that the TVU was a curriculum development unit, and as such had no responsibilities or authority for supervision, administration, or planning in relation to vocational technical education. The question of the status of the unit has been raised periodically, and the role and responsibility of the TVU have been expanded over the life of the Project, but the proposed upgrading has not taken place.

In September of 1987, as part of the Administrative Reform Program in the MOE, a TVU "organizational restructuring package" was developed which again proposed the upgrading of the unit. This document is still under review by Ministry officials and a decision will be made by the GOJ. (To the extent that the upgrading of the unit was seen as an essential pre-condition in the implementation of the BSTP, the failure to upgrade the unit has had a necessary impact on the project.)

In April 1988, however, the Minister of Education (HME) took a step which, while it did not upgrade the unit, expanded its authority considerably. Effective April 1, 1988, the HME gave the TVU complete administrative and supervisory responsibility for the Technical High Schools and technical-vocational curriculum development at other secondary schools. Formerly, the THS were regarded as secondary schools and therefore required to report to the Secondary Unit of the Ministry. As a result of this action, the budget for the THS is now managed by the TVU, giving the latter a great deal of autonomy in the operation of the Technical High Schools. (Circular Letter No. 13/88 from Mr. C. A. Turner, the Permanent Secretary, to the Principals of All Secondary Schools, 5/26/88.)

1. Provide operating equipment (duplicating, audio-visual and photo equipment):

The equipment provided to the Technical Vocational Unit has been used to develop a "training materials resource center" at the unit. This center, referred to as the "resource room" by unit staff, is now equipped with a photocopying machine, drafting tables, a television set, 35mm cameras, audio recorders, an administrative computer system and two printers, and assorted

other equipment necessary for materials production and better administration and management of the schools (e.g., for the implementation of a Management Information System). (A list of the equipment currently housed in the "Resource Room" is included in Appendix D.)

2. Upgrade the training materials resource center at the TVU:

Equipment ordered for use in the "training materials resource center" at the TVU began arriving in 1987. Xerox photocopying equipment arrived in June 1987, and some "innovative equipment" (including computer and printers) arrived in March 1988. (PIU Notes, 3/88) This center, commonly referred to as the "resource room" by BSTP staff, is now equipped with a photocopying machine, drafting tables, a television set, 35mm cameras, audio recorders, an administrative computer system and two printers, and assorted other equipment necessary for the production and reproduction of teaching materials and for better administration and management of the schools (e.g., for the implementation of a Management Information System). A complete list of the equipment currently housed in the "resource room" is included in Appendix D.

Additional equipment has been on order for some time and it is difficult to estimate how long delivery of the remaining items will take. The room itself has been certified as secure by the U.S.A.I.D. engineer on the Project, but some of the computers and furniture currently in the room must be removed, and new equipment put in place before the full audio-visual and materials production capability of the resource room is realized. (A complete list of the equipment which is on order for the center is available from BSTP staff at the TVU and at RCA offices.)

3. Inservice training for personnel:

In May 1987, Home Economics and Entrepreneurial Education Consultants assisted the TVU staff in the development of occupational curricula in these areas. Officers of the Business Education section of the TVU received training in computer literacy, instructional computers (Lotus 1-2-3, D-BASE III, and Word Processing) conducted by International Computers Limited in June-August 1987. For a complete list of Local Inservice Training for TVU staff, see Appendix E.

In addition to these inservice training programs, several TVU staff members participated in short-term overseas training. At least six TVU staff attended the annual AVA conferences in the United States each December from 1983 through 1987. The BSTP Project Coordinator at MOE participated in two months' training at the Oklahoma State Department of Vocational Education to assist him in developing an equipment inventory and maintenance system as part of a MIS for the vocational education system in Jamaica.

B. The Technical High Schools (THS):

Introduction

Technical assistance was provided to the Ministry of Education in virtually all project activities related to the Technical High Schools. These activities included: the renovation and upgrading of buildings and equipment, the procurement and installation of basic and innovative equipment and machinery; the securing of instructional areas (from theft and vandalism); the production of training materials; and the training of personnel. By the end of 1987, over 40,000 person hours (232 person months) of training had been conducted in the effort to upgrade programs and personnel at the Technical High Schools. (RCA Consultant Monthly Report, 11/24/87)

The BSTP Request for Proposals called for the renovation of seven existing Technical High Schools and the upgrading of three other secondary institutions to the level of Technical High Schools. On April 2, 1985, a decision was made to add a fourth school, Stokes Hall Secondary, to the list of schools to be upgraded to Technical Schools. In May 1986, the MOE formally requested an amendment to the Project Agreement to include Stokes Hall as one of the schools to be upgraded, citing that this level of training was "not available in the Eastern area of Jamaica" (letter from D. Lindsay to J. Robinson of May 1, 1986). On August 6, 1986, the Project Agreement was formally amended. The "Amplified Project Description," a component of the BSTP Project Agreement (Project No. 532-0083), was modified in Project Implementation Letter (PIL) No. 16 to include, "the addition of Stokes Hall as the eleventh technical school to be upgraded and provision of funding the renovation of Kingston Technical School from the contingency line item." [See Appendix B, section (1).]

The latter change regarding Kingston THS came about as a result of controversy about whether or not to include KTHS as one of the original seven schools to be renovated. The renovations required at KTHS were so extensive that if funds were allocated to this school, funding for other renovations would necessarily be reduced. It was originally proposed that Stokes Hall replace KTHS as one of the ten schools to be renovated/upgraded, but later determined that the inclusion of both schools was essential if the project were to serve the needs of both Kingston and St. Thomas parishes.

Early on in the project, some controversy erupted regarding the meaning of the word "upgrading" in relation to the four non-technical schools whose technical programs were to be improved. The Minister of Education, Dr. Mavis Gilmour, issued a policy statement on October 8, 1985, to clarify the issue of whether these schools were to be "converted" to Technical High Schools or simply "upgraded." The policy stipulated that the technical and vocational programs at the four schools were to be upgraded, but that the schools would retain their status as

comprehensive or secondary schools. Dr. Gilmour stated, "I am not making these schools into Technical High Schools; we are not creating four more Technical High Schools. We are only adjusting the secondary schools' program." (From Issue Paper #1, from RCA COP Wall to OEHR Chief Carney, October 18, 1985.)

The eleven schools included in the Project are:

Technical High Schools

Other Secondary Schools

Kingston Technical High School
 St. Andrew " " "
 Dunoon " " "
 St. Elizabeth " " "
 Dint Hill " " "
 Vere " " "
 Holmwood " " "

Marcus Garvey Secondary
 Frome Secondary
 Herbert Morrison Comprehensive
 Stokes Hall Secondary

1. Renovation and upgrading of the physical facilities (several schools to be assisted in each of three phases):

The GOJ was administratively and financially responsible for all renovations at the THS. Plans for the renovations were developed by Mr. E. Golding, the MOE's building officer, and reviewed by Craig Clauser of RCA. Mr. Clauser was involved again after renovations, at the time the building were inspected. Information on specific construction and renovations, then, is available from the MOE, and was not part of the contractor's responsibility.

[Information in project documentation reveals the following. In October 1986, when renovations were 90% finished, Dint Hill THS became the ninth project school to be certified as "60% complete" (i.e., sufficiently complete to merit the ordering of equipment). (RCA Consultant Monthly Report, 10/30/86) By June 1988, 90% of the renovations at Kingston THS had been completed. (PIU notes, 4/21/88) To date, construction is complete at nine project schools; that is, all schools except Herbert Morrison, where two new buildings are under construction, and Stokes Hall where extensive renovations are taking place. (Note: The drafting room that was renovated for use as an auto shop at Herbert Morrison was certified by the U.S.A.I.D. engineer.)

2. Renovation and upgrading of equipment:

Repairs to defective Home Economics equipment, including 41 defective stoves, were undertaken at all project schools that have Home Economics as a priority program area. (PMC Minutes) [The documents consulted contain little information on the renovation and upgrading of equipment that has taken place.]

3. Procurement of additional new equipment and machinery:

By May 1987, basic equipment had been delivered to the project schools in accordance with the needs of their priority program

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areas. (PMC Minutes, 5/21/87) According to the September 1987 minutes of the Project Management Committee, the following percentages of equipment had been distributed to eight of the project schools: Auto Mechanics - 90%; Business Education - 90%; Construction - 90%; Electrical - 50%; Home Economics - 95%; Machine Shop - 85%; Plumbing - 95%. (PMC Minutes, 9/17/87) (Note: Equipment for Kingston THS, Herbert Morrison and Stokes Hall is not included in this list because renovations at these institutions were not then 60% complete.)

By March 1988, heavy equipment had been installed at Herbert Morrison (in already existing facilities at the school), St. Elizabeth, Holmwood, Vere and St. Andrew Technical High Schools. (PIU notes, 4/21/88) Equipment orders for Herbert Morrison and Kingston THS are now being reviewed at U.S.A.I.D. in Kingston. Renovations of the facilities at Stokes Hall in St. Thomas are not yet 60% complete and, therefore, no equipment has yet been ordered for this THS.

Arlie Dyer of the TVU estimates that equipment delivery for the other eight project schools is approximately 80-85% completed, but the undelivered items are not evenly distributed across priority program areas and so some essential equipment is missing. (For example, there are as yet no metric tools for the auto shops.) Mr. Dyer has indicated that although some equipment which did not meet specifications was shipped to Kingston, the number of items that had to be returned was very low (perhaps 15 items in the whole inventory).

Detailed equipment lists, numbering some fifty pages, and indicating the quantity of items ordered, received, and distributed, by program area and by THS, are on file at the TVU.

4. Instructional areas made secure from theft and vandalism:

Before equipment orders for the Project schools could be placed, the Engineering Office at U.S.A.I.D. had to certify that construction/renovations were 60% complete. One requirement for "completion" was that the workshops and instructional areas of the school be secured. According to Mr. Tony Payne, the U.S.A.I.D. engineer who certified the schools, this certification meant that the area had to be secure from structural weakening and from the threat of theft and vandalism. A secure building implied: a reinforced concrete structure with a proper roof and a functional electrical system (one capable of supporting the equipment that would be used in the area); that doors and windows were secured or reinforced and burglar bars installed where necessary; in short, that the building was ready to be used for the purpose for which it was intended without threat of building collapse, electrical failure/fire, or theft. (Memoranda from Mr. Payne certifying the Project schools are on file at U.S.A.I.D.)

5. Innovative technology and training materials (including teaching aids, work attitude materials, and a basic set of technical reference manuals):

A complete list of the innovative technology that has been ordered for the THS is on file at RCA offices at Caenwood. This equipment was approved by all the appropriate authorities at the TVU, MOE, RCA, U.S.A.I.D., and H.E.A.R.T. over two years ago (7/18/86). Although some of the equipment has been delivered, much of it has not. In the area of (1) Business Education, photocopiers, electronic typewriters, and opaque projectors have been delivered; cash registers, calculators, overhead projectors, cassette and video recorders, and television sets are still on order. For the (2) Auto Mechanics programs, diagnostic analyzers have been delivered and installed. Microwave ovens for the (3) Home Economics programs have been received, but are not yet installed. In the area of (4) Industrial Education, drafting equipment has been delivered, but electronics equipment has not. (Conversation with C. Clauser 7/26/88)

[Note: Some of the funds allocated for innovative equipment, U.S. \$285,000, have been re-distributed to the C.A.S.T. component of the project.]

6. Inservice training for personnel in administration and management of the THS (including observation at Vere):

A complete listing of the inservice training provided to THS administrative and management personnel under the project is included in Appendix F.

7. Inservice training for personnel involved in teaching and materials development and adaptation:

A complete listing of the inservice training provided to THS teachers under the project is included in Appendix G.

8. Development of Private Sector Advisory for each THS:

As noted in Section D of this report, the development of Private Sector Advisory Committees for the Technical High Schools was initiated by the contractor, and some training of a pool of potential private sector representatives was begun. However, the Committee members have not yet been formally appointed to serve on the Committee by the Ministry of Education, and as a consequence, no training or other Committee activity has taken place since early 1987. (For further information on the Private Sector Advisory Committees, See Section D of this report.)

(9) Curriculum Development

While curriculum was not addressed as a separate area in the PP, the "upgrading" and development of curricula was an implicit and integral part of the BSTP. Priorities for curricula development

were established at an early (3/28/85) PIU meeting at Vere THS. In addition to developing curricular modules in Auto Mechanics, Garment Construction and Design, Catering and Food Preservation, and Entrepreneurial Education, consultants worked with the subject area advisory committees, TVU officers, and THS staff and teachers to address the "Competency-Based" Vocational Education (CBVE) Methodology. By spring of 1987, curricula had been developed in all four subject areas. (PMC Minutes, 5/21/87)

In Auto Mechanics, a competency-based curriculum was completed in September 1986, and introduced in September 1987 at Frome Secondary, St. Andrew THS, and Herbert Morrison Comprehensive. (PMC Minutes, 1/21/88) Three curriculum writers assisted in curriculum development in two areas of Occupational Home Economics: Garment Construction and Design (32 modules); Catering and Food Preservation (34 modules). (PMC Minutes, 5/21/87) These were completed by the spring of 1987, printed in the fall, and implemented during the Easter term, 1988. Likewise, in the area of Entrepreneurial Education, 25 modules had been developed and reviewed by the appropriate PSAC by March 1987. These modules were field-tested that spring at Dunoon and Holmwood, and implemented at the Grade 10 level during the Easter term 1988. (PMC Minutes, 1/21/88) A CBVE specialist provided technical assistance from January through June 1988, presenting workshops for teachers and staff and instructing them in the competency-based methodology.

C. The College of Arts, Science and Technology (C.A.S.T.)

Introduction

The RFP called for four major areas of service with regard to the enhancement of the technical education teacher training program at Mico Teachers college. Within a few months of the contractor's beginning work on the BSTP, however, the Minister of Education made a policy statement (February 19, 1985) which effectively removed MICO as the teacher training program in the Project and replaced it with the College of Arts, Science and Technology (C.A.S.T.).

In April 1985, U.S.A.I.D. worked with RCA to amend the Project Agreement, and in August 1985, on behalf of the GOJ, the Planning Institute of Jamaica (PIOJ) requested that the Project Agreement be amended to reflect the substitution of C.A.S.T. for MICO. This change was made in PIL No. 16 (referred to in section (B) above). PIL No 16 provided that the "Amplified Project Description" to the BSTP Project Agreement, be amended to the effect that, "The College of Arts, Science and Technology (C.A.S.T.) has replaced MICO Teachers College as the teacher training institution for this training in-country; as well as coordinated participant training abroad." All responsibilities assigned to MICO in the PP are thereby transferred to C.A.S.T. Wherever a discussion of contractor services to the "technical education teacher training program" occurs, therefore, C.A.S.T. replaces MICO. [The amended section on the Formal Skill Training component appears in its entirety in Appendix B. Note changes in numbers (1) and (4).]

The Project Agreement, as amended, called for four major areas of service with regard to the enhancement of the technical education teacher training program at C.A.S.T. These shall be addressed individually.

1. Moderate upgrading of Industrial Education Teacher Training Program (including development of a career-track program):

In May, 1986, program areas in need of technical assistance were identified by project staff. It was decided that THS teachers who had qualifications below a C.A.S.T. Diploma would be upgraded to the Diploma level through a long-term in-service training program. (Typically, a diploma upgrade program would require three years' participation in summer courses, followed by at least one year of full-time study, but specific requirements vary according to the program.) Those with Diplomas and beyond, would be fitted into shorter courses at C.A.S.T., geared toward their specific content area. (PIU Notes, 5/19/86)

Technical assistance has also been provided to C.A.S.T. to strengthen the technical teacher degree (fourth year) training program. Specifically, a C.A.S.T. faculty member is being trained to teach a degree level program in industrial education (construction technology). In early 1987, Home Economics and

Business Education teacher training programs were added to Industrial Education under the mandate to upgrade. For the past three years --in July, 1986, 1987, and 1988-- a summer "Diploma Upgrade" program for THS teachers has been conducted at C.A.S.T. A total of forty-five (45) teachers participated in summer training programs at C.A.S.T. in July-August, 1986 (See MOE Local Training Chart). Thirty-three (33) were involved in short courses in Business Education and Industrial Education while twelve (12) others started the Diploma Upgrade program for Home Economics (6), Business Education (5) and Industrial Education (1).

A total of eighteen (18) teachers were involved in the Diploma Upgrade program in the summer of 1987: seven in Business Education; ten in Home Economics; and one in Construction. Forty (40) teachers of Industrial Education were involved in a summer skills upgrading at C.A.S.T. in August, 1987. In this, the third, summer (1988) of the Diploma Upgrade program, fifteen (15) teachers are participating: eight in Business Education; six in Home Economics; and one in Construction. By the end of summer 1988, five teachers (four in home economics, one in business education) participating in the BSTP will have been awarded diplomas in their respective disciplines.

In addition to the summer programs, training has been conducted for THS teachers in a variety of areas during the academic year, including a year-round "diploma inservice" day release program and C.A.S.T. "short course" and workshops. In October and November, 1987, thirty (30) Business Education teachers were trained in the use of electronic typewriters, and in March 1988, in the use of instructional computers. (For information on training for THS teachers conducted at C.A.S.T., see Appendix G.)

While no local training was provided to C.A.S.T. staff under the project, two C.A.S.T. faculty members participated in long-term overseas training, in degree programs at Oklahoma State University. (See #4 below.)

Types of equipment needed to upgrade C.A.S.T.'s Industrial Technology program (Electronics, Construction and Mechanical Engineering) were also identified, but specifications were not developed until a later date. Some machinery has been ordered and specifications for other equipment are being developed, but, due to changes in equipment requests by the Industrial Education Teacher Training staff at C.A.S.T., no equipment has yet been delivered/installed.

2. Plan for recruitment of more students to the technical teacher training program:

The original plan to upgrade the teacher training program at MICO called for the recruitment of more students to the program. While C.A.S.T. was not as seriously underutilized as MICO, there were only five-to-ten students in a teacher training program equipped for thirty. The incentives to enter the technical

teaching field were few compared with the incentives to enter a private sector technical occupation. Consequently, students with technical skills or those interested in a technical occupation tended toward private sector employment, and enrollment in the industrial education teacher training program at C.A.S.T. remained low. The provision of scholarships changed this, and opened the door for students who otherwise could not afford to attend C.A.S.T. It was necessary, however, given the public perception of relatively high cost training and low level remuneration for technical teachers, for RCA and TVU staff to recruit actively to draw students into the C.A.S.T. scholarship program. In addition to placing newspaper advertisements, Mr. Dyer of the TVU addressed the Principals Committee to promote the scholarship program and to request the principals' recommendations of potential candidates.

In early 1986, Mr. Dyer expressed concern over the low level of applications to the area of Industrial Technology, and indicated that this had placed constraints on the selection process and hampered progress in awarding the thirty scholarships. (PIU Notes, 9/25/86) By summer 1987, however, thirty scholarship students had satisfactorily completed one full year of training toward a degree at C.A.S.T. In fall of 1987, Mr. Ken Christian, head of the Technical Education Department at C.A.S.T., commented that the group of scholarship students was the best technology group C.A.S.T. had had for some time. (PIU Notes, 11/10/87)

3. Provide thirty (30) scholarships per year to technical teacher trainees:

In the first academic year of the C.A.S.T. scholarship program, 1986-87, thirty (30) scholarships were awarded to students enrolled in technical teacher training programs. Scholarship recipients were chosen based on a candidate selection procedure developed by C.A.S.T. and the MOE. In the subsequent academic year, 1987-88, three scholarship recipients from the first year were dropped for academic reasons, but these three were replaced by three students going into their second year. BSTP staff are currently awaiting word on the performance of the second year students. If the thirty scholarship students maintain their academic standing, scholarships for their third and final year in the program (the 1988-89 academic year) will be renewed. These students are scheduled to complete diploma programs at C.A.S.T. in June 1989.

[Note: All scholarship recipients are required to sign bonds with the Ministry of Public Service obligating them to three years' teaching in a Technical High School upon completion of the Diploma program.]

4. Participant training in study/observation programs abroad:

Two C.A.S.T. faculty members participated in overseas training and both completed degree programs at Oklahoma State University in June, 1987. Mr. Neville McFarlane, lecturer in Electrical

Technology at C.A.S.T., completed a B.S. degree in Electronics Technology, Vocational Education Curriculum Development. Mr. Clive Thompson, also a lecturer in Electrical Technology, completed a M.S. degree in Electronics Technology, Vocational Education Administration. Mr. McFarlane filed a report on his return to Jamaica and it is on file at MOE. Mr. Thompson did not file a report. Both men are currently teaching at C.A.S.T.

D. The Private Sector Advisory Committees (PSACs)

Introduction

The Private Sector Advisory Committee (PSAC) concept was included in the BSTP to assist both the TVU and the Technical High Schools in establishing closer links between the training of skilled workers and the needs of the marketplace. Composed of TVU and THS staff and business and industry representatives, the PSACs were to assist the TVU and each THS with the assessment of manpower demands, the development of appropriate job-related curricula, and the training and placement of THS graduates. As conceived, the PSAC was a three-tier concept which included: (1) an executive advisory attached to the MOE (a kind of "super" PSAC), composed of representatives from the second and third tier PSACs, the private sector and other institutional representatives (e.g., from C.A.S.T.); (2) Technical High School advisory committees attached to each THS (school PSACs); and (3) Technical area committees to be established in the critical skill (or priority program) areas and to operate as sub-committees of the PSAC attached to each THS (subject area/second tier PSACs).

1. Assist the MOE to develop effective Private Sector Advisory Committees to assist the TVU and each THS in the development of curricula, occupational counselling and the placement of THS graduates

In January 1986, the PS gave the MOE consultants permission to work directly with the principals of the THS in establishing PSACs for the schools. Some preliminary selection and training of school PSAC members has taken place, but the MOE has not formally appointed these Committees. Two consultants worked on developing the role and function of the Advisory Committees and on training the Advisory Committee members. Workshops were conducted in the fall of 1986, and a manual, including by-laws and operational procedures for the PSAC, was developed for Committee members. (See "Organization and Implementation of Advisory Committees" produced in October 1986.)

The last school PSAC meeting took place well over a year ago, and the last correspondence to Committee members, informing them that the Ministry had not yet acted on their appointments, was in May 1987. As a result of these delays, this planned component of the contractor's services to the TVU and the THS has not been fully implemented.

It is important to note, however, that subject area PSACs, attached directly to the Ministry, do exist. At an early meeting of the Project Implementation Unit, priorities for curriculum development were established. (PIU Minutes, 3/28/85) Based on these curricular priorities (and the traditional mandate of the TVU in the area of curriculum development), the following subject area committees were convened: Catering and Food Preservation; Garment Construction and Design; Entrepreneurship; Auto Mechanics, and Business Education. The Advisory Committees have worked closely with the subject area consultants and have been instrumental in the design, development, validation, pilot-testing, and implementation of curricula in their respective specialties. Offering their expertise and experience regarding the essential competencies required of skilled workers, they have provided a critical link between the world of school and the world of work.

Local Training was provided to assist in the development of PSACs in the areas of Entrepreneurial Education and Occupational Home Economics (including Catering and Food Preservation and Garment Construction and Design). Between September 1986 and June 1987, a series of six workshops was conducted with these committees and THS staff to (initially) provide orientation to the PSACs, and work on the development and (eventually) the implementation of new curricula in these subject areas. (For further information on local training with respect to the Private Sector Advisories, see Appendix H.)

SUMMARY OF
PARTICIPANT TRAINING ABROAD

In all, fifteen (15) individuals participated in seventeen (17) training programs abroad. Of these, four participated in long-term training programs and were awarded either a B.S. or an M.S. at Oklahoma State University (OSU) in some aspect of Technical/Vocational Education. Two C.A.S.T. faculty members, both lecturers in Electrical Technology, earned degrees (one a B.S., the other an M.S.) in Electronics Technology and Vocational Education at OSU. Two Technical High School personnel also participated in long-term training at OSU. The head of the Industrial Education Department at St. Elizabeth THS earned a B.S. in Technical/Vocational Education Administration, and the vice-principal of Dunoon THS earned an M.S. in Vocational Education Administration.

All four participants in the study abroad programs are working again at their respective institutions. Three of the four recipients of long-term overseas training filed brief reports on their year of study at OSU; one did not.

Short-term training abroad was provided to MOE, TVU, and THS personnel in a variety of areas. One person, the BSTP Project Coordinator at MOE, participated in two months' training at the Oklahoma State Department of Vocational Education to assist him in developing an equipment inventory and maintenance system as part of a MIS for the vocational education system. Twelve (12) other individuals attended overseas conferences/study tours of less than two weeks' duration.

In July, 1985, the Director of Projects at the MOE and a THS principal participated in a study tour of the Arlington Skills Center in Arlington, VA., and the Woodstock Jobs Corps Center in Woodstock, MD.

Between 1983 and 1987, ten (10) persons attended five annual AVA conferences. In December 1983, the Assistant Chief Education Officer (ACEO) of the TVU attended the AVA conference in Anaheim, CA., and visited job corps sites in Salt Lake City, Austin and Washington, D.C. The following year, the Permanent Secretary of the MOE and the BSTP Coordinator in the TVU attended the AVA conference in New Orleans, LA. and participated in a study tour at the Oklahoma State Department of Vocational Education. In December 1985 and 1986, one MOE/TVU staff person and one THS administrator (two persons per year) attended the AVA conferences in Atlanta, GA. and Dallas, TX., respectively, and participated in study tours in the vicinity of the conferences. Last December (1987), three individuals, including one TVU officer and two THS administrators attended the AVA meeting in Las Vegas, NV.

THE DEVELOPMENT OF A MANAGEMENT INFORMATION SYSTEM (MIS)

Since the inception of the BSTP, the development of a Management Information System (MIS) has been a high priority activity. In the four years of the program's operation, much progress has been made in organizing data and in coordinating data collection procedures among the various components of the vocational technical education system in Jamaica. Until recently, however, the TVU did not have authority for all aspects of the operation of the THS; consequently, the unit could not impose reporting requirements on the THS, a critical activity in the implementation of a Management Information System. On April 1, 1988, the HME reorganized the lines of authority within the Ministry, placing the THS budget within the TVU, and granting the TVU complete administrative and supervisory authority over both the THS and vocational-technical curricula in other secondary schools. (Circular Letter No. 13/88 from Mr. Cecil Turner, the Permanent Secretary, to the Principals of All Secondary Institutions, 5/26/88)

On September 24, 1985, a survey of THS principals was conducted to determine their knowledge of current data collection activities at the MOE and to solicit their ideas for the development of the MIS. Dr. Arch Alexander, technical advisor to the MOE, assisted in this process. On February 26, 1986, the results of this survey were made available to TVU staff, and, shortly thereafter, to the administrators at the THS who had participated in the survey.

Mr. Arlie Dyer, then the BSTP Project Coordinator at MOE (currently Assistant Chief Education Officer (ACEO) of the TVU), participated in MIS-related training in the U.S. in November and December of 1985. Mr. Dyer went to the Oklahoma State Department of Vocational Education to study inventory control and equipment maintenance systems for their relevance to the development of such systems in Jamaica. On his return to Jamaica, Dyer prepared a report on "Policy and Procedures for the Proposed Inventory Control, Maintenance and Equipment Pool System for Instructional Equipment in Institutions within the Ministry of Education." Under Dyer's plan, overall responsibility for the operation of the inventory control and maintenance systems and the equipment pool would rest with the TVU, rather than with individual schools or another unit/division within the Ministry. Mr. Dyer's report was presented to the MIS Committee on June 3, 1986.

Three other individuals, all members of the MIS Committee, prepared papers on other aspects of the proposed MIS which were subsequently presented to the Committee. According to a monthly report (10/86) of the RCA consultant at the MOE, these MIS reports were to be collated into a proposal for the Ministry's approval. (It appears that no formal proposal was made to the MOE, but the PS' action of April, 1988 may have obviated the need for approval by any authority outside the TVU.) At present, these four reports

constitute the framework for the proposed MIS and will be the basis on which a system is developed. A technical consultant will begin work in September 1988 on the purchasing and installation of appropriate computer hardware and software, and the programming of Ministry computers to accommodate the new information system.

Mr. Ben Francis, principal of Vere Technical High School, prepared a report on the Personnel Information Component of the proposed MIS. Drawing on his own experience and practices in effect in his own school, Francis' report laid out the student and staff information that would be included in the personnel component of a Technical High School's MIS and proposed rules for the handling and use of this information. Mrs. E. O. Webber, the ACEO of the TVU, constructed a framework for including planning, implementation and evaluation functions in the Ministry-level MIS. The fourth component of the MIS was addressed by Ms. Daphne Comrie, principal of Kingston Technical High School, who prepared a report on "Records and Counselling" as aspects of an MIS. Some additional categories of data were cited for inclusion in the MIS: personnel records (student and staff), finances, inventory control, maintenance and equipment information and so on. These reports which represented the current thinking of the group on the development of the MIS were presented to the Committee in June, 1986. On July 15, 1986 a general MIS Committee, composed of Mrs. Webber, Mr. Dyer, Dr. Clauser, and the four principals of Vere, St. Andrew's, Dunoon, and Stokes Hall, was appointed.

MIS WORKSHOPS

To date, a series of four (4), four-hour MIS workshops have been conducted for TVU staff and THS principals: on April 18, 1986 for fifteen (15) TVU staff and principals; on May 6, 1986 for seven (7) THS principals; on May 16, 1986 for fifteen (15), and on October for fourteen (14). This last workshop was conducted in an effort to standardize data and data collection practices for the MIS.

APPENDIX A

[From the Project Paper on the Basic Skills Training Project]

Five basic approaches will be used to assist the formal skill training delivery system

- (1) Seven existing Technical High Schools will be rejuvenated and three existing High Schools will be upgraded to the Technical High School level

The phased renovation and upgrading of the physical facilities and equipment of these 10 schools will be a basic objective of the Project. Physical plant and usable equipment and machinery will be repaired, and additional new equipment and machinery will be introduced. The individual priorities of each school will be addressed and all instructional areas will be made secure from theft and vandalism.

- (2) Appropriate Innovative Instructional Technology and Materials will be introduced.

A basic objective of the Project is to introduce appropriate innovative technology and training materials in the Technical High Schools. A variety of new classroom materials, teaching aids, audio/visual equipment and other related educational technology is required. As part of the new technology and materials, the Project will develop and adapt appropriate work attitude training materials. A basic set of technical reference materials will be supplied to each school. Finally, the Vocational/Technical Division of the Ministry of Education will receive a modest amount of equipment (duplicating machine, audio-visual and photo equipment) to provide institutional support and upgrade a Training Materials Resource Center, which will be used to improve the dissemination of materials between Technical High Schools.

- (3) Training will be provided in the management of Technical High Schools and instructional laboratories.

In cooperation with the non-formal skill training component of the Project, in-service training will be offered to the majority of Project-connected personnel in the administration and management of Technical High Schools and instructional laboratories. The in-service training will be provided through short-term seminars and workshops for administrators and teachers, and it will be conducted by technical advisors and local administrators and teachers who have demonstrated effective management techniques.

Several trainees will serve a practical observation training period at Vere Technical High School, a school with an exceptionally effective management system. This experience will help them to develop a workable plan for managing their individual schools.

(4) Personnel Training will be provided.

The training provided will be of three types: in-service training for the majority of Project-connected personnel involved in administration, teaching and materials development and adaptation; moderate upgrading of the Industrial Education Teacher Training Program at MICO Teacher Training College; and participant training for advanced study abroad. The in-service training, conducted with the assistance of a U.S. university, will provide a "career track", i.e. provide the opportunity for individuals to enter at different points along the track and progress to a degree. The "career track" training and credential system will support the long-term upgrading and retention of technical teachers. AID-financed specialists will work with MICO to develop a plan to recruit more students to the program, and thirty scholarships per year will be provided to qualified students who enroll in the teacher training programs at MICO. The participant training program will focus on the training of key counterparts in combination study/observation programs abroad.

(5) Private Sector Advisory Committee

Assistance will be provided to help the GOJ develop an effective technical and vocational education system, which is responsive to the needs of the Private Sector. As part of the upgrading of the present Vocational-Technical Education Unit within the Ministry of Education, U.S. specialists will assist the MOE to develop an effective Private Sector Advisory Committee, which will assist in the development of curricula, occupational counseling, and placement of Technical High School graduates. The Private Sector Advisory group to the Vocational Technical Unit will meet on a regular basis and be charged to insure that all vocational curricula is flexible and relevant to occupational employment and that an effective counseling system for employment placement is in place. Each Technical High School and each H.E.A.R.T. Academy will have its own private sector advisory group. These private sector advisory groups will operate more closely with the day to day activities of the skills training system of a particular Technical High School or H.E.A.R.T. Academy.

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APPENDIX B

[From Project Implementation Letter #16, which amended BST Project Agreement (Project No. 532-0083)]:

Formal Skills Training

This component focuses on the need to upgrade and expand the facilities, equipment, management and instructor training necessary for delivering a viable, flexible and expanded formal program of technical level skills training. This activity will be implemented through the Ministry of Education (MOE) in a phased and regularly monitored mode over the life of the Project.

Five basic approaches will be used to assist the formal skills training delivery system.

- (1) Seven existing Technical High Schools will be rejuvenated and four existing High Schools will be upgraded to the Technical High School level.

The phased renovation and upgrading of the physical facilities and equipment of these eleven schools will be a basic objective of the project. Physical plant and usable equipment and machinery will be repaired, and additional new equipment and machinery will be introduced. The individual priorities of each school will be addressed, and all instructional areas will be made secure from theft and vandalism.

- (2) Appropriate Innovative Instructional Technology and Materials will be introduced.

A basic objective of the Project is to introduce appropriate innovative technology and training materials in the Technical High Schools. A variety of new classroom materials, teaching aids, audio-visual equipment and other related educational technology is required. As part of the new technology and materials, the Project will develop and adapt appropriate work attitude training materials. A basic set of technical reference materials will be supplied to each school. Finally, the Vocational/Technical Division of the Ministry of Education will receive a modest amount of equipment (duplicating machine, audio-visual and photo equipment) to provide institutional support and upgrade a Training Materials Resource Center, which will be used to improve the dissemination of materials between Technical High Schools.

- (3) Training will be provided in the management of Technical High Schools and instructional laboratories.

In cooperation with the non-formal skill training component of the Project, in-service training will be offered to a majority

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of Project-connected personnel in the administration and management of Technical High Schools and instructional laboratories. The in-service training will be provided through short-term seminars and workshops for administrators and teachers, and it will be conducted by technical advisors and local administrators and teachers who have demonstrated effective management techniques. Several trainees will serve a practical observation training period at Vere Technical High School, a school with an exceptionally effective management system. This experience will help them to develop workable plans for managing the individual schools.

(4) Personnel Training

Personnel training provided will be of three types: in-service training for the majority of project-connected personnel involved in administration, teaching, and materials development and adaptation. The College of Arts, Science and Technology (CAST) has replaced MICO Teachers College as the teacher training institution for this training in-country; as well as coordinated participant training abroad. Project funds will be provided to support thirty (30), 3-year scholarships at CAST to assist in attracting an adequate number of qualified applicants to prepare to teach in the Technical High Schools. Scholarships will be of such value as to cover the costs of boarding, transportation, incidental materials and ancillary fees at a cost of US\$125,000 to the project.

CAST will be provided assistance in establishing a 'career' track program so that select students may pursue a diploma program at CAST or pursue a post graduate program at CAST or an overseas institution.

CAST will be provided technical assistance to assure that its teacher training program is relevant to the needs of the Technical High Schools.

CAST will be provided up to US\$100,000 for equipment to support training of teachers in the new technologies and to utilize new equipment in the Technical High Schools.

CAST will be provided two 12-month positions for long-term participant training at a U.S. university, preparing them to direct programs in the technologies offered at CAST and/or in administration of Technical/Vocational Education Programs and Curriculum Development and Education in Technical/Vocational Education. CAST will be provided US\$30,000 for each training slot for a total of US\$60,000. The total of US\$285,000 to be provided to CAST will be taken from the line item 'Innovative Educational Technology' under the Ministry of Education Budget as shown in Table 3 of this amplified Project Agreement.

(5) Private Sector Advisory Committee

Assistance will be provided to help the GOJ develop an effective technical and vocational education system, which is responsive to the needs of the Private Sector. As part of the upgrading of the present Vocational-Technical Education Unit to division level status within the Ministry of Education, U.S. specialists will assist the MOE to develop an effective Private Sector Advisory Committee, which will assist in the development of curricula, occupational counselling, and placement of Technical High School graduates.

APPENDIX C

[From the Basic Skills Training Project Request for Proposals]

Formal Skills Training Component

The Formal Skills Training component will be implemented through the Ministry of Education (MOE) in a phased and regularly monitored manner over the life of the project. This activity will focus on the need to upgrade and expand facilities, equipment, management and instructor training, in order to produce a viable, flexible and expanded formal program of technical level skills training. The Contractor shall be responsible for providing 114 person months of long and short term technical assistance to carry out its tasks. The key advisor will be a vocational technical school administration specialist, who will be a counterpart to the MOE Chief of Technical Education, assigned for a 5-year period. The short term technical assistance will be provided in the areas of teacher training, management, curriculum development and materials design.

The VSTA specialist shall provide the following services:

- a. Design and implement an appropriate training plan. The plan will include (1) participant training abroad for key counterparts in combination study/observation programs; (2) in-service training through short term courses, seminars and workshops, in administration and management, teaching, materials development and adaptation; (3) upgrading the Technical Education Teacher Training program and assisting the design and supervision of the U.S. university "career track" degree program in collaboration with MICO Teacher Training College. MICO was later replaced by CAST as the Teacher Training Institution in the Project.*
- b. Assist in developing and implementing an effective school administration/management plan. The contractor shall work with the MOE to determine how organizational and skills can be strengthened to improve the Technical High School system. This will involve activities such as: evaluation of the organizational structure; definition of functions, duties and responsibilities; development of staffing patterns; staff development; facility management; admission system; record keeping; inventory control; relationships to the MOE and other institutions.
- c. As required, assist the MOE in budget planning, cost/benefit analysis and general financial management of the system.

* MICO was later replaced by C.A.S.T. as the Teacher Training Institution in the Project.

- d. Provide technical assistance in long-range planning and policy-making decisions for the upgrading and physical expansion of the ten Technical High Schools. The number of technical high schools in the project was later increased to eleven.**
- e. In close coordination with the Instructional Materials/Curriculum Development Specialist at the Vocational Training development Institute (VTDI), the MOE and school staffs, the contractor will be responsible for determining commodity needs, the writing of detailed specifications, procurement and supervision of equipment installation. (Commodity lists are to be submitted through the Contractor to the USAID Project Officer for review prior to initiation of procurement).
- f. The Contractor shall review the MOE's recent course structure and curricula, and advise of appropriate available alternative instructional technologies, assisting in the selection and development of the most appropriate program for its needs. Develop detailed course designs and appropriate curricula, as required.
- g. Assist the MOE and the private sector to develop an effective Private Sector Advisory Committee, which will play an important role in linking the training activities of the schools with the needs of employees. Although an advisory body, the committee would influence training policy through their recommendations, participation in planning and review of programs.
- h. The contractor will actively participate in project review conducted semi-annually during the life of the project with all implementing agencies and USAID. The contractor will also participate and assist in the project evaluations conducted every two years.

** The number of Technical High Schools in the Project was later increased to eleven.

APPENDIX D

Equipment Available for use in the Training Materials Resource Center of the TVU:

- Cassette Tapes for recorder and dictating machines (200)
- Opaque Projectors (2)
- Slide Projectors (2)
 - 12 Circular Slide Trays
 - 12 Replacement Lamps
 - 2 Carrying cases
- Programmable Dissolve Control (1)
- Remote Control (for above dissolve control) (1)
- Sync Cassette Audiotape Recorders (1)
- Pencil Sharpener (1)
- Drafting Templates:
 - 1 set Circle templates
 - 1 set Giant Circle templates
 - 2 sets House Plan templates
 - 1 set Professional Planner
 - 1 set Giant Ellipse and Curve Templates
- Speed-Ball Pen Set
- Video Cassette Tapes (24)
- Television (1 21" color set)
- Audio-Visual Cart (1)
- Drafting Table (1)
- Drafting Machine (1)
- Drafting Machine Lamp (1)
 - 8 Accessories Bulbs
 - 1 Hardware Package
- Draftsman's Chair (1)
- Drafting Machine Scales (8 different scale graduations)
- 35mm Camera with f/1.40 50mm lense (2)
 - 2 Electronic Flashes
 - 2 Flash Bounce Grips
 - 1 Wide angle lens (24mm f/2.0)
 - 2 camera cases
- Tripod (1)
- Administrative Computer System (IBM PC/XT) (1)
 - 1 Monochrome Monitor
 - 1 Adapter Card
 - 1 Dot Matrix Printer
 - 20 ribbons
 - 1 Surge Protector
 - 1 Daisy Wheel (letter quality) Printer
 - 1 Printer Cable
 - 1 Sheet Feeder
 - 20 Ribbons
- Audio Cassette Copier (1)

[NOTE: A COMPLETE LIST OF THE EQUIPMENT ON ORDER FOR THE RESOURCE ROOM IS AVAILABLE FROM CRAIG CLAUSER.]

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APPENDIX E

LOCAL TRAINING FOR TECHNICAL VOCATIONAL UNIT STAFF

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
Curriculum workshop to introduce MOE officers to CBVE	May 22, 25-29, 1985	13 TVU officers participated in a 6-day workshop.
One-day workshop to discuss history, management and financing of THS	September 27, 1985	22 principals, vice-principals and TVU officers participated in an 8-hr. workshop.
One-day workshop to familiarize principals and TVU officers with the establishment and operation of Advisory Committees	April 11, 1986	14 principals and TVU officers participated in a one-day workshop.
One-day workshop to familiarize principals with MIS	April 18, 1986	15 TVU staff and THS principals participated in a 6-hr. workshop.
One-day curriculum review to review additional tasks for Automotive Trade	April 29, 1986	15 MOE, VTDI and MYCD staff members participated in a 6-hr. workshop.
MIS workshop to begin development of MIS for the schools	May 16, 1986	15 principals and TVU staff participated in a 4-hr. workshop.
Workshop to introduce the concept of the Private Sector Advisory Committee to members of the Private Sector	September 16, 1986	34 Private Sector representatives, TVU and H.E.A.R.T. Trust staff participated in a one-and-one-half hour workshop.

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
One-day workshop to orient Private Sector representatives to the organization, operation, and implementation of the Advisory Committee	October 4, 1986	27 Private Sector representatives, TVU and H.E.A.R.T. staff participated in a 4-hr. workshop.
MIS workshop to standardize MIS data	October 21, 1986	14 principals and TVU staff participated in a 4-hr. workshop.
Three workshops in Management Styles, Communications, Supervision and Time Management	March 25-April 3, 1987	69 administrators, TVU officers, principals, vice-principals, MYCD and VTDI staff participated in a 20-hr. workshop.
Staff Development workshop to modify specific recommendations to be sent to the Permanent Secretary	April 8, 1987	15 TVU officers participated in a 3 and 1/2-hr. workshop.
Curriculum Development Inservice in Entrepreneurship Education to review modules developed and train in teaching techniques	May 7, 1987	33 teachers and MOE officers participated in a 6 and 1/2-hr. workshop.
Inservice workshops to discuss strategies for implementing the occupational Home Economics Curricula	May 8, 1987	24 teachers, Education officers and BSTP staff participated in a 5 and 1/2-hr. workshop.
Work-shop to review activities and plan for future; to formulate a charter for the Entrepreneurship Education Advisory Committee	June 11, 1987	11 Advisory Committee members and MOE officers participated in a 6-hr. workshop.
Computer training for Business Education officers and PIU staff in the operation of Instructional and Administrative Computer systems (in THS and TVU Resource Room)	July 22-August 3, 1987	5 Business Education officers and PIU staff participated in a 10-day workshop.

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APPENDIX F

LOCAL TRAINING FOR TECHNICAL HIGH SCHOOL ADMINISTRATORS

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
One day workshop to familiarize THS administrators with MOE components of BSTP	February 1, 1985	101 administrators, principals and vice-principals participated in an 8-hr. workshop.
One day workshop to discuss history, management and financing of THS	September 27, 1985	22 principals, vice-principals and TVU officers participated in an 8-hr. workshop.
Automotive CBVE Curriculum Development meeting for training in Occupational Task Listing and Task Listing Review	March 11, 1986	15 MOE, MYCD, VTDI and THS staff participated in a 6-hr. workshop.
One day workshop to familiarize principals and TVU Officers with the establishment and operation of Advisory Committees	April 11, 1986	14 principals and TVU officers participated in a one-day workshop.
One-day workshop to familiarize principals with MIS	April 18, 1986	15 TVU staff and principals participated in a 6-hr. workshop.
MIS workshop to review components of MIS for the THS	May 6, 1986	7 principals participated in a 4-hr. workshop.
MIS workshop to begin development of MIS for the THS	May 16, 1986	15 principals and TVU staff participated in a 4-hr. MIS workshop.

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
Staff Development workshop to discuss results of the self analysis, and time management for teachers	October 17, 1986	41 THS teachers and administrators participated in a 3 and 1/2-hr. workshop.
MIS workshop to standardize MIS data	October 21, 1986	14 principals and TVU staff participated in a 4-hr. workshop.
Staff Development workshop to discuss purpose of staff evaluation/assessment	January 30, 1987	74 administrators, teachers and counselors at St. Andrew THS participated in a 4-hr. workshop.
Three (3) Management Training workshops	March 25-April 3, 1987	69 administrators, TVU officers, principals, vice-principals, MYCD and VTDI staff participated in 20-hr. workshop.
Typewriting orientation to the New Electronic Typewriter being installed in the Schools	October 28-29, 1987	30 teachers, Business Education officers and PIU staff participated in a 4-hr. workshop.
Curriculum workshop to introduce MOE Officers to CBVE	May 22, 25-29, 1985	13 TVU officers participated in a 6-day workshop

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APPENDIX G

LOCAL TRAINING FOR TECHNICAL HIGH SCHOOL TEACHERS

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
MICO Inservice workshop to upgrade department heads	July 29-Aug. 23, 1985	59 Department heads in BSTP schools participated in a 20-day workshop.
Automotive CBVE Curriculum Development to orient teachers to CBVE and proper facilities use; form Advisory Committee.	October 23, 1985	18 teachers participated in a 1-day workshop.
Automotive CBVE Curriculum in on-site training in use of auto-service facilities and CBVE.	March 2, 12-14, 1986	22 teachers participated in a 3-hr. workshop.
Automotive CBVE curriculum development to familiarize teachers with CBVE Curriculum	March 4-6, 1986	23 teachers participated in a 3-hr. workshop.
Automotive CBVE Curriculum Development training in Occupational Task Listing and Task List Review	March 11, 1986	15 teachers and THS staff participated in a 6-hr. workshop.
Automotive CBVE Inservice training to review and train in use of Automotive CBVE Curriculum	March 29-30, 1986	42 teachers, VTDI, JAGAS and Private Sector reps. participated in a 2-day workshop.
One weekend to upgrade teachers of the secondary schools	October, 1985 - July, 1986	35 teachers participated in weekend programs throughout the school year
Day Release C.A.S.T. Diploma Inservice to upgrade the quality of instruction in Technical/Vocational Programs	Sept. 86 - June 87 (1-day per week)	12 teachers participated a year-round-day release program toward a C.A.S.T. Diploma.

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<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
Commercial Skills CBVE workshop to demonstrate the use of the Teacher's Handbook	April 8, 1986	33 teachers participated in a 6-hr. workshop.
Automotive CBVE Inservice on used CBVE Material	April 30, 1986	18 teachers and members of the Private Sector participated in a 6-hr. workshop.
C.A.S.T. Diploma Inservice to upgrade the quality of instruction and the delivery of Technical/Vocational Programs.	July 14-August 22, 1986	12 teachers of Business Ed., H/Ec. and Ind. Ed. participated in a 2 and 1/2-day workshop.
C.A.S.T. Short Courses to upgrade teachers in specific skills	July 22-August 2, 1986	74 teachers of Business Ed., H/Ec., and Ind. Ed. participated in a 10-day workshop.
One-day workshop to discuss purpose of staff evaluation and establishment of an evaluation system	Sept. 4, 1986	47 teachers participated in a 4-hr. workshop.
Staff development workshop to discuss results of the self analysis completed September 4, 1986 and Time Management for teachers	October 17, 1986	41 teachers and administrators participated in a 3 and 1/2-hr. workshop.
Staff Development to discuss purpose of staff evaluation/assessment	January 30, 1987	74 administrators, teachers, and counselors from St. Andrew THS participated in a 4-hr. workshop.
Workshop for the Development of CBVE Curriculum for Home Economics	March 18, 1987	19 teachers from 11 Project Schools participated a 4-hr. workshop.

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
Curriculum Development in Entrepreneurship Education to review and do appraisal of selected modules	March 26, 1987	20 Advisory Committee members (teachers/private sector members) participated in a 6-hr. workshop.
Staff Development workshop to orient teachers to importance of staff evaluation	April 7, 1987	53 teachers of Kingston Technical High School participated in a 6-hr. workshop.
Curriculum Development/Home Economics workshop to train teachers to implement modules	May 4, 1987	22 teachers participated in a 6-hr. workshop.
Entrepreneurship Education workshop to to renew modules developed; to train in techniques for teaching the curriculum	May 7, 1987	33 teachers, MOE officers in a 6 and 1/2-hr. workshop.
Teachers Inservice workshop to discuss strategies for implementing the occupational Home Economics Curricula	May 8, 1987	24 teachers, Education officers, and BSTP staff participated in a 5 and 1/2-hr. workshop.
Inservice Teacher Training workshop on Entrepreneurship Education to review Curriculum Modules	May 26, 1987	20 teachers participated in a 6 and 1/2-hr. workshop.
C.A.S.T. Diploma Inservice to upgrade the quality of instruction and delivery of Technical/Vocational Programs	July 13-August 21, 1987	12 teachers (Business Ed. H/Ec., and Ind. Ed.) participated in a 30-day workshop.
Typewriting orientation to the new electronic typewriter being installed in the schools	October 28-29, 1987	30 teachers, Business Education officers, PIU staff members participated in three 4-hr. workshops.

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APPENDIX H

LOCAL TRAINING FOR PRIVATE SECTOR ADVISORY COMMITTEE MEMBERS

<u>TYPE OF TRAINING</u>	<u>PERIOD</u>	<u>PARTICIPATION</u>
workshop of Private Sector and Advisory Committee to members of the Private Sector	Sept. 16, 1986	34 Private Sector representatives, TVU staff, and H.E.A.R.T. Trust staff participated in a 1 and 1/2-hr. workshop.
One-day workshop to orient Private Sector representatives to the organization operation and implementation of Advisory Committee	Oct. 4, 1986	27 Private Sector, TVU Staff, H.E.A.R.T. Trust staff participated in a 4-hr. workshop.
Curriculum Development Home Economics to discuss and arrive at Topics for the Development of Modules	January 29, 1987	18 Advisory Committee members participated in a 6-hr. workshop.
Curriculum Development Entrepreneurship Education to discuss Task Inventory List for Development of Modules	February 12, 1987	11 Advsisory Committee members participated in a 6-hr. workshop.
Curriculum Development workshop to review and do appraisal of selected sample modules	March 26, 1987	20 Advisory Committee members, teachers and members of the Private Sector participated in a 6-hr. workshop.
Entrepreneurship Education workshop to review activities and plan projections for future; to formulate a charter for the Advisory Committee	June 11, 1987	11 Advisory Committee MOE officers participated in a 6-hr. workshop.

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A REVIEW OF THE H.E.A.R.T. TRUST COMPONENT
OF THE BASIC SKILLS TRAINING PROJECT
(PROJECT NO. 532-0083)

Mary M. Nerbonne
November 22, 1988

A REVIEW OF THE H.E.A.R.T. TRUST COMPONENT
OF THE BASIC SKILLS TRAINING PROJECT

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STATEMENT OF PURPOSE

The purpose of this report is to document the work of RCA on the H.E.A.R.T. Trust component of the Basic Skills Training Project (Project No. 532-0083). Inasmuch as the goal of the U.S.A.I.D.-funded activities of the Project was the "institutional development of the parts of the Trust related to training," this review will focus on the nature and the extent of this "institutional development." Relevant documents have been reviewed to determine the services which RCA was contracted to provide, and these planned services, as stipulated in the Project Paper, the Request for Proposals, the RCA response Proposal and relevant work requests, will be compared with the services and products delivered.

[Conclusions and recommendations regarding the contractor's work on the Basic Skills Training Project are beyond the scope of this review. The main purpose of the review is to provide a summarized record of the contractor's services for reference by an evaluation team.]

METHODOLOGY

The BSTP project documentation has been a primary source of information for this review. The relevant project documents include (but are not limited to): the Project Paper (PP); the Request for Proposals (RFP); the RCA Proposal; the Project Agreement and amendments to it. In addition, other U.S.A.I.D., and, in particular, RCA and H.E.A.R.T. Trust documents have been referenced, including consultants' reports and work products, annual reports, H.E.A.R.T. literature and division documents.

In addition to the document review, informational meetings and/or interviews have been conducted with RCA and H.E.A.R.T. Trust staff, including: Lorna Parkins, Manager, Administration for RCA on the BSTP; the Honorable Joyce Robinson, Managing Director of the H.E.A.R.T. Trust; Headley Brown, Deputy Managing Director of the H.E.A.R.T. Trust; Stanley Dunwell, Director of the Projects Division; Joyce McKenzie, Deputy Director of the Projects Division; Denys Williams, Director of the Administration Division; Van Hitchener, Director of the Training Division; Pamela McKenzie, Director of the Monitoring Division; Jacqueline Scholefield, Director of the Information Systems and Research Division; and Geoffrey Gayle, the Director of the Academies Division. [Note: Two divisions are left off this list: Finance & Planning, and Solidarity. Mr. Dunwell, Director of the Projects Division and my contact at H.E.A.R.T, expressly asked me not to contact the Director of the Finance & Planning Division because the current (Acting) Director would not be equipped to provide any information. I respected this request. At my own discretion, I did not meet with the Director of the Solidarity Division because the functioning of this division bears no direct relationship to the BSTP.]

INTRODUCTION

The Basic Skills Training Project (BSTP), which was formally initiated on September 19, 1984, grew out of a desire on the part of U.S.A.I.D. to assist the Government of Jamaica (GOJ) to establish both "an improved skill-training system responsive to the GOJ's economic policies and labor market needs," and "a trained human resource base" (PP, p.8).

The RFP on the Basic Skills Training Project characterized the H.E.A.R.T. Trust as the "executing agency for the Project." As such, H.E.A.R.T. is directly responsible for "planning, coordinating and evaluating the Project and maintaining important liaison responsibilities with other agencies inside and outside the project."

The major goals of the U.S.A.I.D. assistance to the H.E.A.R.T. Trust are identified in the RFP as "strengthening the GOJ's ability to:

- ensure better coordination among skill training institutions;
- respond to the private and public sector's training needs in an innovative flexible manner, and
- develop the technical and managerial capacity, through the Trust, to provide a more nearly adequate supply of appropriately trained skilled, technical and supervisory level personnel."

The focus of this review will be on the goals of U.S.A.I.D. assistance to the H.E.A.R.T. component of the Project, particularly the institutional development of the Trust. In short, this review will attempt to examine the extent to which the technical assistance, participant training, and equipment provided under the BSTP have assisted the Trust in developing "the technical and managerial capacity" to fulfill its functions as described in the Project Paper and the RFP, "to ensure better coordination among skill training institutions," and to respond adequately to public and private sector needs for appropriately trained skilled workers.

It should be noted that at the time of the Project's inception, the H.E.A.R.T. academies included in the project were administered by the the Ministry of Youth and Community Development and the Ministry of Industry and Commerce through the agency of the Jamaica Industrial Development Corporation (JIDC). (Other H.E.A.R.T. academies/programs are administered by other appropriate ministries, according to the nature of the training provided by the particular academy. The Ebony Park Academy for Agricultural Skills, for example, is administered by the Ministry of Agriculture.) At that time, the H.E.A.R.T. Trust was not responsible for the administration of academies, and such authority was not envisioned in the BSTP Project Paper. Consequently, this review will address the Trust as an institutional entity and will examine the Trust's role only as a planning/coordinating/evaluating agency (and not as the administrator of one or more skills training facilities).

HISTORY AND MANDATE OF THE H.E.A.R.T. TRUST

The Human Employment and Resource Training (H.E.A.R.T.) Trust was established by parliamentary action in 1982 to coordinate skills training and to enhance employment opportunities for young adults in Jamaica. The Trust is a quasi-autonomous "statutory" body, attached to the Office of the Prime Minister, and managed by an Executive Director (more commonly referred to as the Managing Director).

The functions of the Trust, as defined by Act 13 of 1982, are as follows:

- (a) to develop, encourage, monitor and provide finance for training schemes for the employment of trainees;
- (b) to provide employment opportunities for trainees;
- (c) to direct or assist with the placement of persons seeking employment in Jamaica;
- (d) to promote employment projects.

According to an "Operations Overview" (literature prepared by H.E.A.R.T. staff), the Trust has "national coordinating responsibility for skills training," and for "the control of, and the setting of standards for, all non-formal skills training activities."

The mandate to coordinate these training activities required some degree of fiscal and administrative authority over the "skills training system," as well as liaison responsibilities with the other agencies/ministries in the system. It is important to note in this context that no formal agreements between the H.E.A.R.T. Trust and the two other ministries involved in the BSTP were ever executed. The Trust does have a considerable degree of fiscal authority, however; it has "wide financial responsibility for generating, investing, and allocating revenue to create a positive impact in promoting employment for young people." To support its activities, the Trust is funded by a 3% payroll tax on private sector employers whose annual payroll exceeds \$86,664.00.

In terms of "liaison responsibilities," the Managing Director, the chief administrative officer of the Trust, is required to "maintain appropriate inter-ministerial relations at the levels of the Ministers and Permanent Secretaries." For the purposes of the BSTP (according to the RFP), these responsibilities include working closely with "the National Planning Agency (now the Planning Institute of Jamaica), the Ministry of Youth and Community Development and the Ministry of Education.

These liaison responsibilities and, in fact, responsibility for all inter-ministerial relations, reside exclusively in the Office of the Managing Director. This is an important fact in understanding the

way(s) in which H.E.A.R.T. has interfaced with other Ministries in her efforts to "ensure better coordination among skills training institutions."

THE TRUST'S EIGHT DIVISIONS

Overview

The H.E.A.R.T. Trust is composed of eight divisions, each headed by a Director, and one or more Deputies Director: Finance and Planning; Administration; Monitoring; Projects; Training; Information Systems and Research; Solidarity; and Academies (this is the newest division, established in June, 1988). (The last two divisions are the newest in the H.E.A.R.T. Trust, and are concerned almost exclusively with the Trust's operational activities, not with its institutional functions. Consequently, the role of the Academies Division will be addressed only insofar as it relates to the overall division of labor within the organization, and the shift in responsibilities brought about by its creation.)

While some of the responsibilities of the Trust are carried out uniquely by one division, there is some overlap in other areas, such as in the processing and evaluation of applicants. This is due, in part, to the re-allocation of responsibilities when new divisions are added, and to the fact that some divisions serve to monitor some of the activities of other divisions.

Descriptions of the responsibilities and goals of the six divisions which perform functions related to the BSTP can be found in annual reports filed by each division for the senior staff seminar in December, 1987.

THE H.E.A.R.T. TRUST AS A COMPONENT OF THE BSTP

The RFP articulated the central role that the H.E.A.R.T. Trust would play in the Project: "The Trust will be the focal point for contract operations and the Chief of Party (of the winning contractor) will be assigned to this component." Three RCA Chiefs of Party have served the H.E.A.R.T. Trust in the BSTP; James Wall, from the beginning of the Project until June 1987; Robert Andreyka from June 1987 to June 1988; and Craig Clauser, from July 1988 to the present. (Most of the technical assistance that has been provided to the H.E.A.R.T. Trust to date has been the long-term assistance provided by the Chief of Party.)

The RFP identifies the primary responsibility of the H.E.A.R.T. Trust: "to formulate policy, set guidelines, fund, monitor, evaluate, and coordinate skill training activities in Jamaica." (p.10) In addition, the Trust is charged with "increasing the role of private sector participation in skill training activities, and strengthening the placement of skill training graduates in productive employment." The RFP stipulated that the Trust, "will not directly undertake an operational activity unless it is a vital service that no other agency will or can perform."

The focus of the BSTP was on the integrating and coordinating function of the H.E.A.R.T. Trust, on that which would contribute to the establishment of a more rational skills training system. The RFP stated explicitly that the financial inputs from U.S.A.I.D. would "concentrate on assisting the institutional development of those parts of the Trust concerned with training."

Of the three components of the BSTP (the formal, the non-formal and the H.E.A.R.T. Trust), it is the H.E.A.R.T. Trust and the goals of U.S.A.I.D.-assistance to the Trust which are characterized in the broadest terms; contractor assistance to the Trust was described very generally in the RFP. The services to be provided by the contractor consisted primarily of the technical assistance of the RCA Chief of Party and other overseas and local consultants (a total of 150 person months to this component of the project), and the provision of overseas study and training opportunities (72 person months, including the 12 months allocated for one long-term trainee) for H.E.A.R.T. Trust staff on the Project.

The largest share of the H.E.A.R.T. Trust funding has gone to Technical Assistance. A small amount, US\$112,000 was budgeted for equipment under the H.E.A.R.T. component, and additional funds in the sum of us\$57,480 were later appropriated from the contingencies and inflation fund. This review will address the status of the technical assistance and participant training that have been provided, and the equipment that has been purchased.

A chart outlining the nature, length and implementation status of each consultancy follows.

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TECHNICAL ASSISTANCE TO THE H.E.A.R.T. TRUST

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<u>Person Months Completed</u>	<u>Name of Consultant</u> <u>Description of Services/Work Products</u>	<u>Implementation Status</u>
<u>MANAGEMENT INFORMATION SYSTEMS</u> (Total time allocated: 6 person months)		
0.6	M. McCANN - Develop recommendations for H.E.A.R.T. Trust MIS, automation of H.E.A.R.T. Trust activities.	Unknown
0.5	J. KEPLINGER - Assist in MIS Development, and training of MIS staff and new manager of EDP at the H.E.A.R.T. Trust.	Implemented
6.7	H. SLOAN (CWS #11) - MIS: (A) Familiarization with MIS status, including studies of user requirements; development, design and streamlining of systems and reporting formats; (B) Work with H.E.A.R.T. EDP Staff to develop specifications for all systems; training staff in project mgmt. to control all phases of the MIS development process.	Recommended installation of IBM System 38, other hardware now in use
<u>7.8</u>		
<u>PROJECT DEVELOPMENT</u> (Total time allocated: 8 person months)		
3.0	A. ALEXANDER (CWS #2) - Development of PIP (Formal component).	Implemented
1.8	E. BOWERS - Development of PIP with emphasis on MIS (Non-formal component).	Implemented
1.1	W. STEVENSON - Development of PIP with emphasis on planning, evaluation, program improvement and research (H.E.A.R.T. component).	Implemented
<u>5.9</u>		
<u>SPECIFIC TRAINING PROBLEM</u> (Total time allocated: 16 person months)		
0.25	J. PEOPLES (CWS #1) - Training and supervision of test administration; developed interview instrument for post-testing interview.	Implemented; later modified.

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TECHNICAL ASSISTANCE TO THE H.E.A.R.T. TRUST

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<u>Person Months Completed</u>	<u>Name of Consultant</u> <u>Description of Services/Work Products</u>	<u>Implementation Status</u>
<u>SPECIFIC TRAINING PROBLEM (CONT.)</u> (Total time allocated: 16 person months)		
0.2	R. MITCHELL (CWS #15) - Perform statistical analysis of trainee gain-scores to determine significant differences, and prepare written report of findings.	Implemented (Work completed and accepted.)
6.0	B. FRANCIS (CWS #19) - Developed management system and job descriptions for Academies Division; assisted in implementation of academy programs.	Implemented
<u>6.45</u>		

N.B. An additional 9.4 person months of technical assistance in this category have been expended. Although the time was allocated to the H.E.A.R.T. Trust, it was utilized under the non-formal component of the project.

ADMIN. OF REVOLVING HEART FUND (Total time allocated: 4 person months)
[Note: As the Revolving Trust Fund was not implemented, time was re-allocated from this category of technical assistance to other areas at the discretion of the RCA Chief of Party.]

4.0*	F. JOHNSTON (CWS #8) - Audit and analyze administrative procedures; suggest strategies and priorities for improvement in written plan; design and write manuals for implementation of three training programs. *Work Statement modified by C.O.P. during consultancy to include work on H.E.A.R.T. Trust's MIS.	Work on CWS# 8 not completed; Work on MIS* was completed and is in use by the IS&R Division.
<u>4.0</u>		

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TECHNICAL ASSISTANCE TO THE H.E.A.R.T. TRUST

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<u>Person Months Completed</u>	<u>Name of Consultant Description of Services/Work Products</u>	<u>Implementation Status</u>
<u>EQUIPMENT SPECIALIST</u> (Total time allocated: 10 person months)		
1.8	I. ARMSTRONG (CWS #1) - Assisted in equipment installation at Portmore (Formal component)	Implemented
2.3	H. WINBURN (CWS #3) - Assisted in development of equipment specifications for Business Education Programs at Stony Hill; conducted in-service training for Technical High School staff on "Equipment Maintenance, Facilities Management, and Safety." (Formal component)	Implemented
3.4	A. DEMPSEY (CWS #5) - Develop specifications, locate equipment and prices, prepare PIO/C, and supervise installation of equipment at Garmex and Kenilworth (Non-formal component/Garmex)	Implemented
<u>7.5</u>		

<u>OTHER CATEGORIES OF TECHNICAL ASSISTANCE</u>	<u>PERSON MONTHS ALLOCATED</u>	<u>PERSON MONTHS EXPENDED</u>
Planning and Research	22 person months	11.6**
Training Monitoring/Evaluation	6 person months	0.0
School Leavers/Placement	6 person months	6.0**
Commodity/Logistics Specialist	12 person months	0.0

** Although the time was allocated to the H.E.A.R.T. Trust, it was utilized under the non-formal component of the project.

EQUIPMENT

Funds from the U.S.A.I.D. assistance to the project were used to purchase computer equipment for the H.E.A.R.T. Trust. A Burroughs XE 550 mini-computer and accessories, were procured at a total cost of US\$151,800. This amount exceeded the US\$112,000 in the Equipment budget, but US\$ 39,800 in Contingency funds were allocated to supplement the basic amount.

An additional US\$ 17,680 were spent on the purchase of two Ford Escort wagons for the Trust. The full amount for the cars was taken from Contingency funds. To date, a total of US\$169,480 have been spent on equipment for the H.E.A.R.T. Trust.

DEVELOPMENT OF THE TRUST'S MANAGEMENT INFORMATION SYSTEMS

Inasmuch as U.S.A.I.D. assistance to the H.E.A.R.T. Trust was aimed at ensuring coordination, developing technical and managerial capacity, and building a skills training system, the design and implementation of Management Information Systems (MIS) have been and continue to be critical factors in the Trust's institutional development. Considerable technical assistance has been devoted to the development of H.E.A.R.T.'s MIS; in the course of four and a half years, five consultancies, two long-term, were provided in this area. Mr. Franklin Johnston worked on the development of MIS from August 1, 1987 (when the RCA Chief of Party re-directed his energies from work on administrative matters) until March 31, 1988 (a total of eight months). Another consultant, Mr. Harry Sloan, worked concurrently with Johnston on MIS, from September 1987 until April 1988 (a total of eight months). In all, nineteen (19) person months of technical assistance were allocated to MIS.

Mrs. Jacqueline Scholefield, the current director of the Information Systems and Research Division (IS&R), who has held her position since April 1988, said she was not familiar with the work of the earlier consultants (Bowers, Keplinger, and McCann) but she has used Franklin Johnston's document as a working document in planning and systems development this year. Mrs. Scholefield also indicated that most of the vacancies that existed last year had been filled, and that the remaining vacancies were for short-term staff - programmers, analysts and a database management person.

While the output from H.E.A.R.T.'s computer systems is still quite limited, much of the hardware is in place and planning is underway. An IBM System 38 mainframe (upgraded from IBM's 360 series) has been installed at the computer facility at Garmex; a Burroughs XE 550 minicomputer is housed at the H.E.A.R.T. Trust offices, and there are also a number of microcomputers, which can operate either in a stand-alone mode or as part of the Burroughs system; these are distributed across several divisions and at the Trust's Documentation Center on Hope Rd. Currently, all data entry and reporting for the academies, and the school leavers and solidarity programs are handled at IS&R.

A trainee management system has been developed to store and report data on applicants and trainees at the academies and in the school leavers and solidarity programs. According to the 1987 Report of the Division, this system is capable of tracking the "certified graduates" of the academies, and reporting on urgently needed trainee and firm information, but there is no current output on these data available. In the category of financial systems, a payroll system and a cashbook reports system (i.e., a general ledger system) have been developed, and are in place.

PARTICIPANT TRAINING

Between November 1983 and December 1987, a total of twenty-nine (29) persons participated in overseas training. (No participant training has taken place in 1988.)

Of these individuals, one, Mr. Winston Campbell, pursued long-term training at the West Virginia Institute of Technology, and as a result earned a B.A. in General Management at this institution. Mr. Campbell currently holds the position of Deputy Director for Building in the Training Division, the position he held prior to his study in the United States.

In addition to study at the West Virginia Institute of Technology, Mr. Campbell attended classes at Marshall University, and received training at the West Virginia State Department of Education, including site visits to industrial firms and vocational training centers, such as Job Corps programs. Mr. Campbell's report on his overseas training is on file both in the Training Division, and in the office of the RCA Chief of Party at H.E.A.R.T.

Fifteen (15) of the total twenty-eight (28) persons who received short-term overseas training participated in observation tours (usually less than one week's duration) -- at Job Corps Centers, at the Bobbin Show, and at annual conventions of the American Vocational Association (A.V.A). The remaining thirteen persons attended training programs/courses abroad.

Eight (8) of the total twenty-eight (28) participated in two-to-three month study/training programs, and the remaining twenty participants attended workshops/conferences/observation tours of less than one month's duration.

Of the twenty-nine who participated in overseas study/training, twenty-five continue to be employed at the H.E.A.R.T. Trust in positions of equal or greater responsibility than those held prior to the training. Four (4) of the overseas training recipients left the employe of the H.E.A.R.T. Trust subsequent to their training.

A total of US\$304,000 was allocated for participant training under the H.E.A.R.T. Trust component. Of this amount, US\$135,546 had been expended through November 1988, leaving well over half of the total appropriation, almost US\$170,000, to be spent in the last year of the project. (The short time remaining in the project may preclude the expenditure of the remaining participant training budget.)