



UMass/UPIC Advanced Degree Activity



Document Name: Quarterly Report #2
12 September – 12 December 2001

Date Submitted: 8 January 2002

Contract Number: 690-A-00-01-00143-00

Title: UMass/UPIC Advanced Degree Activity

Submitted by: Center for International Education
School of Education
285 Hills South
University of Massachusetts
Amherst, MA 01003
Phone: 413-545-0465
Fax: 413-545-1263
Email: cie@educ.umass.edu
Website: www.umass.edu/cie

Project Office: U.S. Agency for International Development/Malawi
Cognizant Technical Officer
USAID/Lilongwe
Department of State
2280 Lilongwe Place
Washington, D.C. 20521-2280

Author: Dr. David R. Evans with Dwaine E. Lee
Phone and Fax: same as above
Email: dre@educ.umass.edu, delee@educ.umass.edu

**United States Agency for International Development
UMass/UPIC Advanced Degree Activity**

Project 690-A-00-01-00143-00

**Quarterly Report #2
12 September – 12 December 2001
Submitted: 8 January 2002**

1. Summary

The Advanced Degree Activity (ADA) consists of a partnership between the University of Massachusetts Amherst (UMass), Chancellor College (CC), the Ministry of Education, Science & Technology (MOEST), and the Malawi National Examinations Board (MANEB). The purpose of this partnership is to build human resource and institutional capacity to promote the planning and leadership functions of the education sector by developing Chancellor College's capacity to offer post-graduate degree programs in Policy, Planning & Leadership and Testing & Measurement. Working in partnership with Malawi educators, the program will offer advanced degree training for 26 educators to serve two interrelated goals: 1) in the short term, to upgrade and develop the skills of educators, planners, and testing and measurement professionals currently working in the Planning Division of the Ministry and in its regional offices, in MANEB, and in Chancellor College; and 2) in the longer term, to build the sustainable capacity at Chancellor College to offer its own advanced degrees in those two areas. These new degree programs will then train policy analysts, planners, and experts in testing and measurement to contribute to the development of education in Malawi. Developing institutional capacity at Chancellor College and human resources in MOEST and MANEB will ensure sustained enhancement of the quality of education in Malawi.

The second quarter of this project was primarily focused on providing relevant coursework for the fourteen Malawian degree candidates, supporting them in their studies and computer skills, exposing them to additional learning opportunities, and planning for the degrees and courses to be offered at Chancellor College. The quarter concluded with the ten Master's candidates returning to Malawi to partake in courses at Chancellor College, while the four doctoral candidates remained at UMass for the Spring 2002 semester.

In this report, the activities of the second quarter are divided into the following categories:

1. Summary
2. Activities and progress that took place in Malawi;
3. Activities and progress that took place at the University of Massachusetts Amherst;
4. Challenges;
5. Deliverables and other documents; and
6. Expenditure Report

2. Activities and Progress in Malawi

During this quarter the Senior Technical Advisor (STA) was in post only during December due to commitments that he had to honor with his previous employer in Ethiopia. However, during the quarter UMass maintained contact with the Dean of the Faculty of Education through direct communications. Field activities focused on dialogue with Chancellor College about its cost-sharing commitments to the program. The key issues were housing for the STA and for visiting faculty members, office space, getting the computer lab functioning with internet and email access, support for students at Chancellor College, and beginning planning for the new masters' programs at Chancellor College.

During the quarter, UMass took possession of the project vehicle, purchased and delivered a laptop computer to the field, and began procurement of the other office equipment. Renovation of the space for the project office was begun and work on the computer lab at Chancellor College continued. The lab is now functioning, although it does not yet have access to the internet or email.

Planning for the initial course offerings by UMass at Chancellor College in 2002 are under way. Arrangements for dormitory housing and feeding of students are under negotiations as part of Chancellor College's cost sharing. Discussions are taking place about ways to involve selected faculty of Chancellor College in the teaching of UMass courses in Malawi. UMass is appointing the Dean, Dr. F. Msiska, as a visiting faculty member at UMass so that he will have the credentials to teach courses offering UMass credit.

3. Activities and Progress at UMass

At the University of Massachusetts Amherst the second quarter of the project was comprised of four primary components: course attendance; participant support; extracurricular activities; and planning for future events in Malawi.

3.1. Course Attendance

As reported in Quarterly Report #1, the participants arrived in late August 2001 and took part in orientation and settling-in activities organized by the Center for International Education. One of the key activities during this time was the selection of courses. Participation in courses was determined through discussion with academic advisors, the background experiences of the participants, areas of interest/concentration, and applicability to the goals of UPIC/ADA.

During the Fall 2001 semester (August – December 2001) the participants were enrolled in the following courses:

Course	No. of P&P Doctoral Enrolled	No. of T&M Doctoral Enrolled	No. of P&P Master's Enrolled	No. of T&M Master's Enrolled
Introduction to International Education	2	-	6	-
Introduction to Policy Studies	2	-	-	-
Educational Planning for Developing Countries	2	-	6	-
Education, Human Rights & the Environment	1	-	1	-
Theoretical Foundations of Org. Analysis	1	-	5	-
Policy Studies in Ed. Administration	-	-	2	-
Educational Research Methods	1	2	4	4
Workshop in Academic Writing	1	2	6	4
Applied Multivariate Analysis I	-	2	-	-
Principles of Testing	-	2	-	4
Advanced Theory & Practice of Testing I	-	2	-	4
Introduction to Statistics & Computer Analysis	-	2	-	4
Organization for Curriculum Development	-	-	2	-

The participants actively participated in their courses, diligently completed their assignments and were highly regarded by the faculty members as well as other graduate students. The project staff were often told by professors what a great group of students were enrolled in this program and what a pleasant addition they have been to their courses.

3.2. Participant Support

3.2.1 Tutoring and Computer Assistance

Two of the Malawi project assistants worked with the participants to support them with their coursework through tutoring and computer assistance. This support was mostly conducted on a one-on-one basis to focus on each participant's particular questions and needs. Participants were guided in using computer programs such as Microsoft Word and Excel and SPSS. Participants were taught how to use the computer programs to assist them in completing their course work.

In addition to computer teaching, tutoring activities also included answering participant's specific questions regarding course material. The participants were able to ask for guidance on assignments and on unfamiliar course material. One-on-one meetings with the project assistants were held to answer participants' specific questions. Assistance was

also provided through supplemental photocopies of articles and book chapters related to their coursework difficulties.

3.2.2. Laptop Computer Training

In November 2001, each participant was given his/her own laptop computer to utilize for coursework and research, while in the U.S. and in Malawi. A workshop was conducted to familiarize the participants with their new computer's features, to inform them about safety and theft, and to suggest proper handling and usage practices. As additional needs arose, one on one training sessions were conducted, as well.



Training workshop on use, care and safety of participants' new laptop computers

3.2.3. The Health Reach International Orientation

In October the 14 Malawians attended a specially designed orientation by Health Reach International, which was coordinated by Fulgence Swai, a project assistant. The orientation focused on issues surrounding medical emergencies, basic health services and insurance.

The message conveyed was that for every emergency when one falls sick immediate service will be provided. The Malawian team had the picture that in their own country, the emergency system is not that efficient and the response was that they were assured that here in America, the system is quite efficient and prompt service is provided within a short time. When one feels ill or sick, he or she has can go the University Health Services. However, the participants were encouraged to make an appointment, as it tends to create efficiency in getting the service upon the time you have been booked for.

3.2.4. Workshop on Academic Writing

A course on academic writing was specially designed and taught for the Malawian participants. The course focused on various analytical skills, ways of organizing and developing their writing, and specific grammatical and stylistic issues, including the use of APA format when citing sources, as required by UMass. The course encouraged the use of computers for writing and editing papers, and provided extensive tutorials on the proper use of relevant computer programs. The instructor met individually with students

to focus on specific issues and problems, as well as to provide feedback and support for papers due in other classes.



Group and individual work during the Workshop in Academic Writing

3.3. *Extracurricular Activities*

3.3.1. *Visit of Prof. David Rubadiri, Vice Chancellor of University of Malawi*

Emphasizing the importance of training a new generation of confident, capable educational leaders for Malawi, Prof. David Rubadiri, Vice Chancellor of the University of Malawi, spent two days at the Center for International Education, October 21-22. During his visit to CIE, Prof. Rubadiri participated in the formal launching ceremony in the U.S. for the Advanced Degree Activity (ADA).

At the ceremony, the ADA program was lauded by the Dean of the School of Education and UMass Chancellor Marcellette Williams as a valuable extension of past collaboration with Malawi and the University's commitment to global outreach. Chancellor Williams welcomed the students into the UMass family and encouraged them to work toward integration of American and African perspectives. Prof. Rubadiri praised the students for taking, in the words of poet Robert Frost, "the road less travelled" in leaving their families and professional responsibilities to pursue studies abroad.

The ceremony was followed by a reception, and then by a dinner for a select group at the official residence of the Chancellor. The following day, Prof. Rubadiri visited various officials, met with the project staff and then had a separate meeting with the 14 students. In the afternoon, he visited the Emily Dickinson house (given his interest in poetry) and had dinner with several faculty members involved with African Literature.

In conversation with the ADA project staff, Prof. Rubadiri expressed appreciation for the opportunity to meet the students. He said that they expressed an "extremely positive" view of their experience at UMass and their rapport with faculty.



The visit of Prof. David Rubadiri, Vice Chancellor of the University of Malawi

3.3.2. Conferences and Presentations

The Center for International Education hosted the 2001 Comparative and International Education Society's (CIES) Northeast Regional conference in October. The four Malawian doctoral candidates, with support from the Master's candidates, presented a session on "Basic Education in Malawi: Reforms, Initiatives and Challenges." The session was well received by those in attendance and led to some insightful discussions about education in Malawi and other African nations.

Another presentation that was delivered this past quarter was by Maxwell Nkhokwe, a Master's candidate in policy, planning and leadership. He presented at one of the Center for International Education's weekly Tuesday meetings on the topic of "Free Primary Education in Malawi – What Next?".



Presentation on “Basic Education in Malawi: Reforms, Initiatives & Challenges”

The six testing and measurement participants were involved in several professional activities during their first semester at UMass. The Research and Evaluation Methods Program (REMP) held testing and measurement seminars on Mondays, which the six Malawi participants attended. The REMP seminars included topics such as policy related research, general testing problems in the United States, the future testing directions in the United States, research of current measurement graduate students, and information about testing companies within the United States.

In addition to the Monday seminars, the two doctoral participants submitted a presentation proposal for the 2002 Conference of the New England Educational Research Organization titled “High Stakes Testing in the Warm Heart of Africa: The Challenges and Successes of the Malawi National Examinations Board”.

3.3.3 Social Activities

The Malawian participants were involved in many social activities throughout the Fall 2001 semester. All of the participants attended the annual CIE retreat at a beautiful lakeside camp. The retreat is an opportunity to collectively plan for the future of CIE, to develop friendships with colleagues, and to have a fun, relaxing weekend together as a community.



Annual CIE Retreat



Malawians at CIE Fall 2001 Party

The six measurement students were involved in several social activities held by the Research and Evaluation Methods Program (REMP). The first event was a pizza party held during one of the REMP's Monday seminars. This party was an informal event during which the program professors, graduate students, and the Malawi participants were able to introduce themselves. The first off-campus party was a Lowani party hosted by Professor Sireci in September. Graduate students from the program as well as their families attended the party in order to meet the Malawi participants. The Malawi participants are involved with REMP's annual Secret Santa activity.

In addition the social gatherings, Professors Hambleton and Sireci encouraged the Malawi participants to attend some of the American football and basketball games held on the University of Massachusetts campus. Professor Sireci gave some of the Malawi participants his basketball tickets. To introduce the participants to American football and ice hockey, Professor Hambleton hosted an American football party. Some of the features of American football and ice hockey were explained to the Malawi participants as they were offered foods typically found at football parties (e.g., chicken wings, potato chips, pizza).

All of the participants attended several social activities hosted by the Center for International Education, including a welcoming party in September, a tag sale in October, and a holiday party in December. In addition, arrangements were made for all interested participants to visit local homes for the Thanksgiving holiday. Most participants were also actively involved in local churches.

3.4 Planning for Future Events in Malawi

The degree candidates and project staff participated in several activities throughout the quarter that were designed to begin the process of planning for the two Master's degree programs to be offered by Chancellor College. In addition, participants and staff prepared for the courses to be offered in Malawi from January through July 2002.

3.4.1. The Education Process in the U.S.

CIE organized a three-part series on the education process in the U.S., which focused on policy, planning, leadership and finance. The seminars and field visits were designed to help the participants better understand the education process in Massachusetts and the U.S. and how it compares to what they are familiar with in Malawi.

Seminar on Education in the United States

In October Professor Emeritus George Urch, a specialist in education policy, presented a specially designed seminar titled "Introduction to Education in the United States." All fourteen Malawians attended this special session that focused on the role of education in

the U.S., the administrative structure, the federal role in education, and the policy process.

Visit to Massachusetts State Legislature

In November, the 14 Malawian participants visited Boston and the Massachusetts State Capitol to participate in a discussion on "The State's Role in Setting Policy and Financing Education". The visit was arranged by Senator Stan Rosenberg's office and was escorted by Professor Emeritus Urch. The discussion focused on the role of the legislature in formulating and financing education within the state of Massachusetts. It also focused on the roles of the federal and local governments. Participants asked numerous thought-provoking questions on many topics, including the use of testing in schools, the difference between public and private education, and how inequities between local communities are handled.

After the tour and discussion at the State Capitol, the participants were escorted along the Freedom Trail to the historic center of Boston where they explored Faneuil Hall, Quincy Market, and other important landmarks.

Field Visits to Local School Districts

Several participants visited local school districts this quarter to conduct research for their courses. In addition, a visit to a local school superintendent's office has been arranged. The visit will provide an opportunity for the four doctoral candidates to better understand how education policy is implemented at the local level. The visit will include a discussion with the superintendent and a principal, as well as visits to elementary and high school classrooms.

3.4.2. Visit of Johnson Odharo, Senior Technical Advisor

Dr. Johnson Odharo, the Senior Technical Advisor, visited UMass in early November while completing tasks in Washington D.C. for his previous assignment in Ethiopia. His three-day visit was full of planning sessions focused on the Master's degree programs at Chancellor College, as well as the courses to be offered by UMass in the field. Several tasks were accomplished, including the sequencing of the courses to be offered in Malawi between January and July 2002, the purchase of a laptop computer for Dr. Odharo, and a meeting between the participants and staff to clearly outline the future of the project.

3.4.2. Workshop on Policy, Planning and Leadership Master's Degree

In November, the eight Policy, Planning and Leadership candidates met with Dr. Odharo, Dr. Evans, Dr. Rossman, and Dr. Ash Hartwell, an advisor to USAID/Africa Bureau. The meeting focused on the Policy, Planning and Leadership Master's Degree that will be offered by Chancellor College at a later stage in the project.

The workshop explored several important areas, including the purpose of the degrees, the skills and knowledge that are needed of its graduates, who might the degree be for, and what actions/tasks need to happen in order to prepare for the degree. At the conclusion of the workshop the candidates suggested that a similar meeting be held at Chancellor College, as well.

4. Challenges

The project has gotten off to an excellent start but there are signs of challenges on the horizon, mostly having to do with the ongoing financial crisis of Chancellor College. The potential problems fall into several categories: housing, lab and office space, room and board for students in Malawi, and higher expenses for the degree candidates at UMass.

Housing. Discussions with Chancellor College about housing have been ongoing since the proposal was written. Chancellor College through the Principal's Office understands and has agreed to its part of the cost-sharing envisioned under UPIC. The reality however, is that the extreme budget shortages have made it very difficult if not impossible for Chancellor to honor those commitments. During this quarter, the emphasis has been on finding suitable housing for the STA. The first house that was offered was in serious disrepair and even if funds were available would require many months to rehabilitate to a suitable level.

Increased insecurity in Zomba dictates that housing for the STA needs appropriate security arrangements and will apparently now require 24 hour guard service as well. A smaller alternative house has been identified as a temporary option, but as of the end of this quarter, the STA was still living in a hotel at project expense.

Housing for visiting faculty members teaching UMass courses at Chancellor is now an immediate issue. The first course begins in late January and will be followed by others throughout the next two quarters. No suitable housing has been identified, and it is likely that the visiting faculty will have to stay in the Masongola while they are teaching in Malawi.

The original budget assumed that there would be some cost sharing for the periods when students taking UMass courses were at Chancellor. During the planning phase and subsequently it has become apparent that this is unrealistic and UMass is being expected to pay the full cost of room and board anytime the students are at Chancellor.

Office & Computer Lab. Space has been identified for the office and renovations have begun using funds allocated by USAID/Malawi. The computers have been installed in the lab and are functioning, although access to the internet remains a problem. Facilities for students to print papers and theses still remain an unresolved question.

Student Costs. During this quarter the costs for maintaining the students at UMass and the many allowances that they expect have exceeded initial budget estimates. Similar problems are expected in Malawi with expectations and demands for a variety of payments being strongly voiced by the students. Given the financial limitations of Chancellor and the level of salaries for all the students, there are very strong pressures for larger stipends and reimbursement for various

costs while they are in the Malawi studying. The net effect is a substantial increase in the unit cost for degree candidates which will require upward revision of the budget in the future.

Budget. The challenges cited above have made it apparent that a substantial revision of the project budget will be needed to meet the objectives as planned. UMass plans to enter into dialogue with AID/Malawi about the process and the timing of such a revision.

5. Deliverables and Other Documents

Deliverable	Projected Date	Status
Annual Workplan	Annually (in August)	June 2001 – June 2002 Plan submitted August 7, 2001 and approved September 12, 2001
Monitoring & Evaluation Plan	August, 2001	Submitted August 7, 2001. Approved September 12, 2001
Quarterly Reports	Quarterly (by Oct. 12, Jan. 12, April 12, July 12)	*Quarterly Report #1 June 12 – September 12, 2001 Submitted October 4, 2001 *Quarterly Report #2 September 12 – December 12, 2001 Attached – Submitted Jan. 8, 2002

6. Expenditure Report

See Attached