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## **Evaluation of USAID/Russia Junior Achievement Project**

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## EXECUTIVE SUMMARY

Junior Achievement Russia (JAR) was launched by a prominent Russian academic in 1991 in the wake of the disintegration of the Soviet Union. The purpose was to build positive attitudes about a market economy among young Russians while teaching them business skills necessary to function in the new economy. The structure of JAR is a central office in Moscow that works through 31 regional centers throughout the country. The program grew rapidly from four regional centers and 3,000 trained teachers in 1992 to 42 centers and 6,500 teachers by 1998. By 2005 approximately 7,000 schools throughout Russia offer JA to nearly 500,000 students per year. In 1998 the program was consolidated to 31 regional centers. More than 3 million students have participated since the inception of the program, which is now the second largest in the world after the United States.

Initial USAID support was provided indirectly through a 1992 USAID/Washington grant to Junior Achievement International. In 1998, USAID/Russia provided its first direct grant of approximately \$850,000, which was used to disseminate JA materials. In 2002, the agreement was amended to extend the program through August 2005 and the scope of work was broadened to include educational goals as well as materials distribution. Life of project funding under the present agreement is approximately \$3.6 million to date, or less than two dollars per student-class taken. Over time, the scope has been gradually broadened to include aspects of civil society and civic education in the project purpose. The culmination of this evolution occurred when USAID/Russia moved funding and management of the project to its democracy portfolio. The USAID mission conducted an evaluation of the project in 2004. That report made a series of recommendations for organizational and operational changes aimed at improving sustainability. The present evaluation includes an assessment of progress toward implementing the earlier recommendations as well as gathering more information on the impact of the project.

This evaluation indicates that the project has achieved significant results. An important lesson learned revealed by interviews with administrators, teachers and students as well as questionnaire results is that through the vehicle of developing business skills and attitudes Junior Achievement Russia (JAR) has emerged as an effective civic education project that fosters leadership and heightens students' community awareness and sense of social responsibility in the context of business and economic education. As such, it can make an important contribution to USAID/Russia's democracy portfolio.

However, demand for JAR programs exceeds current supply, and JAR may have reached the limits of its present capacity. Although JAR may have achieved a threshold at which it is sustainable at a certain level of service and size, the program appears to have reached a benchmark at which important organizational and financial decisions need to be made and plans developed and implemented if JAR is to accomplish its aims of significant further growth and expansion. A USAID mission decision to continue funding support to JAR beyond the current grant should focus on continuing or accelerating some of

the changes recommended in the earlier report, especially on issues of long term organizational capacity and planning. The team recommends that USAID and JAR begin by engaging in a goal-setting exercise in an effort to reach a consensus on a clear long-term vision for JAR. From this, at least two decision paths emerge as possible future scenarios for the organization: focus on consolidation and modest expansion of the current services or development of long term organizational and financial plans to support a substantial increase in the program in an effort to achieve major national impact on a generation of students.

Under either of these scenarios, the team recommends that JAR and USAID/Russia focus on some apparent constraints on the system, including some shortages of materials and training opportunities; continued development and enhancement of long term organizational and financial planning and an examination of the challenges placed before JAR by the relative lack of computerization of classrooms.

## 1. INTRODUCTION

This report summarizes the background and findings of the evaluation of the Junior Achievement Russia (JA Russia) program in the Russian Federation funded by the United States Agency for International Development (USAID). It was prepared as part of the Europe & Eurasia Certificate in Evaluation Program by Roy Grohs, Program Officer, USAID/RUSSIA, Maja Piscevic, Senior Legal Advisor, USAID/Serbia, and Maria Stefurak, Media & Information Specialist, USAID/CAR, to be presented in Sofia, Bulgaria in August 2005. It builds on the previous evaluation of the overall JA Russia program conducted by Development Associates, Inc. in October 2004 by examining the program's progress towards sustainability and it is intended to inform decision-makers at USAID/Russia regarding possible extension of support.

### 1.1. BACKGROUND

Junior Achievement Russia (JAR) was started right after the disintegration of the Soviet Union to build positive attitudes in young Russians towards a market-driven economy as well as to teach them business skills necessary for professional growth in the time of economic transition as well as later on when the market economy was expected to become fully operational. JA Russia was registered in 1991 as a non-profit interregional public organization with headquarters in Moscow. Each regional center is registered as separate non-government organizations (NGO). The agreement was signed at an official opening ceremony at the Kremlin to start the business education for youth program in the Russian Federation. The founder and initial driving force behind the program was academician, Dr. Yevgeny Velikhov, who is now President of the Russian [atomic] Research Center Kurchatov Institute and scientific advisor to Russian President Vladimir Putin. The initial concept was for JA Russia to be governed by the Executive Board in Moscow, and to spread out to different regions of the country.

The program grew rapidly. In 1992 there were four regional centers and 3,000 teachers had been trained. By 1993, 55,000 were enrolled in the Applied Economics program. By 1994 the number of teachers exceeded 4,000, there were 22 regional centers and JAR students took the top 4 positions in the Global Business Challenge. By 1997 the cumulative number of JAR students passed half a million and by 1998 there were 42 regional centers wherein 869 thousand students and 6,500 teachers had been trained. In 1999, the one-millionth student was recognized. A year later more than 10,000 teachers had been trained and more than 1.6 million students had participated in JAR. In its 14 years of operation, JA Russia was able to reach more than 3 million young participants on the national level, becoming the second largest Junior Achievement program in the world – exceeded only by the United States. Today there are 31 centers, including the headquarters in Moscow. JAR facilitates 22 programs in 80 of the 89 regions of the Russian Federation, covering the area from St. Petersburg in the Northwest to Sakhalin in the Far East, annually reaching approximately 500,000 students. The program has now trained more than 10,000 teachers. Approximately 7,000 schools (300 in the Moscow region alone) have adopted

JAR activities and Russian teams regularly place in the top 3 in international economic competitions.

Initial USAID support was provided indirectly through a 1992 USAID/Washington grant to Junior Achievement International. In 1998, USAID/Russia made the first direct grant to JAR for rejuvenation, expansion, equipping and providing Internet access to regional centers. As part of this grant process, each center was examined in terms of the condition of its premises, security, experienced staff and other criteria. As a result of that assessment, JAR decided to focus on strengthening 30 of the 42 regional centers and to use those to cover the same territory.

The funding structure for the Moscow office in 2004 was approximately 47% from USAID and 53% from other sources (including multinational corporations). Similar data for the regional centers is not yet available but is being compiled for the first time this year

## 1.2. PURPOSE OF EVALUATION

This evaluation builds on the previous evaluation of Junior Achievement conducted by Development Associates, Inc. in October 2004. The evaluation follows up on the recommendations proposed by the Development Associates, Inc. team (See Annex I) and intends to fill in the gaps on the program impact that are missing in the previous report. Specifically this study looks at two major areas: sustainability and expansion prospects of the program and its impact on students' academic and post-academic lives.

The team was guided by the following questions:

- As part of its sustainability strategy, has the JA Moscow office begun shifting toward a support mode, including management assistance, for regional offices within Russia?
- Has JA begun to develop long-term budget/organizational development plan, including a Deputy Chief of Operations?
- Have JA participants (a) changed attitudes toward a market economy? and (b) what business and other skills or other benefits have students acquired from participating in JA?
- Has JAR had a spillover effect in terms of attitudes toward civic activism, education, and community volunteerism or in teaching of other courses?

## 1.3 PROGRAM THEORY AND PROJECT DESIGN

### 1.3.1 Theory

The mission's underlying program theory (development hypothesis) appears to have been implicitly based on a warrant, namely that the methods of Junior Achievement,<sup>1</sup> dating back to 1919, are so well tested and documented that they would *ipso facto* contribute to the objective of developing entrepreneurship and accelerating economic reform in Russia simply by disseminating JA material. This theory is implied by some of the initial project documentation. The starting date of the USAID/Russia grant was September 1998 with an initial completion date of August 2000. The USAID mission's 1999 Activity Monitoring Report (AMR) indicates that the original purpose of the activity and the intended results were as follows:

#### **Activity Contributions to Targets**

Activity contributes to SO 1.3, *accelerated development and growth of private enterprises*. It focuses on training of younger generation of potential entrepreneurs through producing and disseminating educational kits, and teacher training.

***"The purpose of this activity is to publish education kits on market economy for Russian school students from the 1<sup>st</sup> to 11<sup>th</sup> grade, and, through 39 regional centers, training for teachers who will educate the students on the materials will be provided." [underlining added]***

The October 2000 AMR repeated the same contribution to targets, but included the following shift in emphasis:

***"The purpose of this activity is to promote economic education in schools through publishing of education kits on a market economy for Russian school students from the 1st to 11th grade, and, through 41 regional centers, train teachers who will educate students on these materials". [underlining added]***

By 2001, the purpose of the activity appears to have expanded somewhat. The AMR stated,

***"This activity promotes economic education and civic responsibility in schools through educational kits on a market economy for Russian school students from the 1st to 11th grade, and, through 30 regional centers, train teachers who will educate students on these materials, and participate in national and international competitions on economics." [underlining added]***

By 2002, the expected results again expanded a bit:

***"This activity promotes economic education, ethics and civic responsibility in schools through kits on a market economy for Russian***

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<sup>1</sup> As stated on its website, ([www.ja-russia.org](http://www.ja-russia.org)) "Junior Achievement uses hands-on experiences to help young people understand the economics of life. In partnership with business and educators, Junior Achievement brings the real world to students, opening their minds to their potential."

***students in grades 1-11. Through 32 regional centers, the program trains teachers in the use of these materials, and prepares students to participate in national and international competitions on economics.”***  
[underlining added]

By 2003 and 2004 the AMR’s reveal the final evolution of expected outcomes:

***“Junior Achievement Russia (JAR) provides education on economics, market economy, business ethics, and civic responsibility for primary and secondary school students. JAR provides regional teacher training, and prepares students to participate in national and international competitions where students apply economic theory to practical business situations.”*** [underlining added]

The program theory therefore evolved from simply distributing materials in pursuit of an economic objective to a more complex teacher training and student development modality while the purpose was broadened to include ethics and civic responsibility. This culminated in the ultimate shift in emphasis in 2005 where the purpose is to promote a democracy objective using business education as an *instrument* rather than a purpose. In effect, the mission has de facto developed a new development hypothesis, which is that students’ experiences in learning economics and business through the specific, interactive, applied JAR approach, with its emphasis on personal responsibility and development, produces values, attitudes and behavior that are necessary in a democratic civil society. The residual ambivalence about the role of JA in the mission’s portfolio is reflected in the results of an informal “poll” of relevant mission staff, as reported in Annex D. The original program theory is still reflected in the major performance indicator for the project, namely the number of young people who participate in JAR, rather than a direct or proxy indicator of impact on either economic or civil society objectives.

### 1.3.2 Design

As indicated above, the initial Washington grant was focused exclusively on providing JA training kits to 20,000 students and early USAID/Russia grants were to fund training materials, computers and facilities upgrades. JA materials were the first materials on economics education for schoolchildren in Russia, and from 1991 to 1996 they remained the only available textbooks on the subject for schoolteachers and schoolchildren. These first textbooks were not specifically adapted to use in the Russian Federation, and therefore had mostly used examples from the United States to illustrate the theoretic concepts. This was later changed to include more case studies and examples from the experiences of Russian businesses.

In September 2002, the agreement was amended to extend the project through August 2005 under a new Program Description (PD). The 2002 AMR summarizes the cumulative achievements to that point under the first two grants: The program adapted, printed and distributed more than 25,000 economic education program kits for grades 1 through 11. More than 750,000 schools had access to these kits. About 6,600 teachers had been trained and

6,000 schools had adopted JAR programs. More than 1.2 million students had been involved in JAR's programs and events. JAR managed 17 extracurricular programs. Computer and networking equipment was installed in 30 regional centers, providing Internet access for students and teachers. JAR was regularly conducting nationwide and international competitions and students were participating in global economic competitions with JAR teams finished in the top three.

The Program Description (PD) for the current grant elaborates the wider scope of the program since 2002 [Boldface emphasis added].

"This amended activity will **build on existing JAR structures** and capabilities that are **focused on a regional centers** network. JAR can be **transformed** into a **nationwide** resource center for **innovative education** in the areas that are the most important in forging an open and **democratic** market economy. Interventions to achieve this objective include:

- (a) business skills and leadership,
- (b) institutional strengthening and capacity building,
- (c) civics and social responsibility, and
- (d) information technologies."

The project design is built around these four areas. Excerpts from the PD<sup>2</sup> illustrate how each is to be accomplished:

***a. Business Skills and Leadership/Expansion of Core Activities.***

JAR will continue to operate in the niche of extracurricular education and also expand its presence among schools that will accept and welcome the program. JAR will continue to hold the unique JAR events [ . . .]to link Russian students with other groups of young entrepreneurs throughout the world. Expanded regional boards composed of local business leaders will be able to encourage local Education Ministry officials to support and accept the program, which will, in turn, encourage teachers and school directors to ask for the program in their schools. Illustrative interventions include: print additional 40,000 JA Economics High school program materials, JAR's information materials, Student Company program kits with a new IT component [and] organization of [a number of fairs and competitions]."

***b. Institutional Strengthening and Capacity Building of JAR Regional Centers***

"JAR will develop an operational plan to support the institutional capacity of each of the regional centers. JAR will focus on developing an active board and on expanding linkages to the business community, identify and contact business leaders and the heads of business associations in each of the regional center communities, and utilize them to recruit part time and/or volunteer staff for each center.

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<sup>2</sup> USAID/Russia: "Program Description, Junior Achievement Russia (JAR)", September 2004.

When new advisory boards are in place, prominent board members will be able to promote the JAR program with local Ministry of Education officials, and work to improve private sector support of the program in their region. [ . . . ] At the national level, [ . . . ] involve more Russian corporations in the Board of Directors and sponsorship of the JAR programs and public events.”

Illustrative interventions will include: Providing administrative support for the project; Developing an operational plan to the institutional capacity of JAR’s regional centers; Strengthening a countrywide system of active and effective regional network, guided by advisory board of local business leaders who are able to raise funds to directly support the local JA Russia’s program.”

### ***c. Civics and Social Responsibility***

“[ . . . ] Through an additional educational component, JAR will teach Russian youth the importance of ethics in a modern market economy. Presently, these values are a component in the lower grades JAR program. [ . . . ] Complementing this approach, Junior Achievement International is currently piloting a “Business and Ethics” effort [ . . . ] In addition, the “Laws of Life” activity, supported by the Templeton Foundation, will also be utilized to expand the civics and ethics themes of JAR. Illustrative interventions include: Preparing, printing and distributing JAR Civics program materials; Organizing [ . . . ] Essay contests; Organizing, monitoring and supporting JA Leadership project.”

### ***d. Information Technology***

“[ . . . ] In this component, JAR will survey usage rates and, if warranted, take actions to ensure that both boys and girls are participating fully in the Internet based activities of the program. Despite the success of the “JAR Online” which provided the computers and Internet connections for the regional centers, the fact is that Internet access in Russia is still very low.

“A primary responsibility of the revitalized and strengthened regional center component will be to help to increase internet access for young Russians, by supplying more internet portals and opening for longer hours. JAR will challenge the local business community to “match” USAID funding to purchase and/or donate computers that will be used to increase the number of access stations in each center. Utilizing the existing JAR Regional Centers, we will expand the JAR curriculum with IT education components to help young people to use this valuable tool. [ . . . ] The ability of JAR to conduct its programs through the Internet will be also further expanded. Illustrative interventions will include: Designing and implementing a component in IT for school students using the existing regional centers as a base; Developing, monitoring and support of JAR virtual library – a compilation of JA

program materials, related to youth entrepreneurship, economics, business, civics and ethics; virtual forum and virtual fair.”

The PD contains the following summary:

#### “EXPECTED RESULTS OF THE PROGRAM IN FY2002 – FY2005

USAID funding will assist JAR to expand the curriculum of economics and business education for school students, and expand its outreach in Russia regions. Within the life of this project (a) at least 1,000 additional schools and at least 500,000 additional students will participate in the program;(b) a countrywide system of active and effective regional network, guided by advisory board of local business leaders who are able to raise funds to directly support the local JA Russia’s program will be strengthened; (c) a component in civics, ethics and responsibility for school students will be developed and implemented; (d) JAR’s Interregional Internet Network will be expanded and strengthened.”

#### 1.3.3 Project Implementation <sup>3</sup>

Since its inception, JA Russia has been developing business and economics programs for in-school use. Through new interactive teaching methods and modern textbooks, JA Russia intends to recruit youth to expand their knowledge of economics and business through the participation in JA Russia-developed after-class projects and utilization of JA materials in mandatory economics courses included in the curriculum by the Ministry of Education. The courses emphasize different aspects of the economic activity. However, in general all of them are designed to improve students’ economic literacy and to encourage entrepreneurship. For example, the goal of the *Personal Finance* series of courses is to help young people begin to develop good financial habits by increasing their awareness of financial instruments and tools they can use to manage their personal finances. This is achieved through development and implementation of JA Russia’s elementary school programs, such as *Our Families*, *Our Community* and *Our City*, then JA Russia’s middle school program *Personal Economics*, and *My Money Business* (MMBiz) course at the high school level. It depends on each individual school and its administration to decide how many JA courses are taught through the 11-grade curriculum. Overall, JA Russia offers a choice of 22 business and economics education courses that could be taught separately or in combination at any public or private school that chooses to introduce these courses to supplement its mandatory economics curriculum developed by the Ministry of Education. The schools can also choose to use JA books and materials from any of the JA-developed courses in their mandatory economics classes.

Some of the most widely taught courses offered by JA Russia include:

- The International Marketplace
- Enterprise in Action
- JA Economics (Applied Economics)

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<sup>3</sup> A detailed Implementation Plan can be found in Annex F.

- Global Learning of the Business Enterprise (GLOBE)
- Management and Economics Simulation Exercise (MESE)
- Banks in Action
- Student Company
- Seven Steps into the World of Economics

These JA Russia courses were designed to provide Russian youth with the knowledge, skills and attitudes needed to adapt and succeed in a changing global economic community through new interactive teaching methods, participation in JA international events, and establishing relationships with other JA schools worldwide to share viewpoints and experiences.

In order to teach a JA class, a school must send a teacher for the training. Afterwards, JA Russia provides a package of training materials sufficient to serve 30 students (the number of students a typical Russian school would have in one class). JA Russia prepares, revises, and ensures publishing of the new high quality educational materials every year and distributes them to schools across Russia via its regional JA centers. JA Russia also organizes such national events as National Student Company Rallies and National Student Company Trade Fairs to promote competition and help students bring their knowledge into practice. Through JA Russia students also get to participate in international competitions so that they get to see the role of business in a global economy and impact of economics on the quality of lives of people worldwide.

Besides interactive teaching methods that make JA courses rather different from other subjects normally taught at Russian schools, JA courses also use business people as teaching consultants. The businesspeople are actually invited into the classrooms to share their experiences with students during normal school hours. In Russia this has proven to be somewhat difficult to replicate.

Over the years, JA Russia has developed sequential programs that span the 1-11 grade curriculums.

## **2. Methodology**

The team reviewed key documents pertaining to JAR including its website; the JA Worldwide website; USAID procurement documents and Program Description (PD); and project monitoring documents, including mission Activity Monitoring Reports (AMR's). The team conducted key informant interviews USAID personnel, including: the present and former USAID activity managers for JAR; the acting head of the program office and the head of the mission democracy office. A key informant interview was conducted with the Executive Director of JAR and her Deputy. In addition, the team had frequent email exchanges with JAR on specific questions. Finally, to broaden the geographic coverage of the database, the team, through JAR email regional distribution channels, distributed sample questionnaires to selected schools.

## 2.1 Interviews

Field interviews were undertaken during the week of June 20-24, 2005. Consultations with the CTO and JAR management prior to the field work, combined with the tight constraints imposed by a mere 5-day evaluation period and limited travel funds, made it clear that a multi-city approach to school interviews in the vastness of Russia would not be practical. The USAID/Russia activity manager (CTO) and JAR recommended, as a feasible alternative, limiting personal interviews to the Moscow environs. The team was further seriously challenged by the fact that classes for elementary students had ended in late May while for secondary students the examination period was over and students, teachers and administrators were fully occupied with graduations, "proms" and other end-of-year work and activities. Upon learning this, the team abandoned its earlier tentative plans to select up to ten schools based on a random geographic mapping of the Moscow region. However, within that restrictive framework JAR indicated that it could still provide the team with something of a cross-section of schools. Ultimately, only three schools were identified where students, teachers and administrators could be available for several hours during the designated week. They are located in three distinct regions of Moscow (NW, SW and SE) that represent one essentially working class district, one middle class district and one rather elite school where instruction is in English. Among those, the team ultimately interviewed 30 students, three teachers and three administrators. Moreover, during the previous week, JAR also had sent each school copies of the written questionnaires, which all of the interviewees had completed prior to the team's meetings with them and these questions guided the interviews. Basic themes underlying the questions for students included: the basic level of satisfaction with the JA program, methods and materials; attitudes toward business, a market economy and the role of business and citizens in a community; life aspirations and career plans and skills learned.

Separate key informant interviews were held with administrators and teachers. Questions focused on degree of satisfaction with the program as an educational instrument; the role of JAR vis a vis other parts of the economics and social studies curriculum; adequacy of materials, training and JA support; and perceived changes in students both in and out of the JAR program.

Exposure to the program differs among them. In one school JAR has been used for five years and in another since 1991. JAR forms the core economics curriculum in 85 of 115 schools in one district, is widely used in another and is a separate activity in the third.

A separate set of interviews was held with several knowledgeable USAID/Russia staff including the former project manager (CTO), the current CTO, the head of the mission's democracy office and the acting head of the mission's program office. Finally, the team conducted an extensive interview with the Executive Director of JAR and her Deputy. In the latter two cases, the team explained that it was attempting to complement, not duplicate, the work of the recent previous evaluation. To that end, the team focused on two main themes. The School interviews focused on the impact of JAR on

students, including attitudes, availability and quality of materials while interviews with USAID staff and JAR included follow-up on recommendations made by the earlier team, which had focused on organizational and sustainability issues.

All interviews were open-ended and followed the same pattern, beginning with a broad question about the program and using responses to that to lead to other, more specific avenues.

## 2.2 Questionnaires

Despite the difficulties in scheduling personal interviews, JAR advised the team that it would be possible to get responses from a broader cross-section of the country through a mail questionnaire and offered to distribute this through its regional offices. The team therefore developed three questionnaires for, respectively, administrators, teachers and students, utilizing a subset of questions that had been previously employed by JA in the U.S. to assess the effect of JA programs. Questions chosen by the team were aimed at eliciting information about both attitudes and skills. Likert scales were included to determine the degree of impact of some of the variables. Questions were included in the Administrator and Teacher questionnaires to serve as proxy “key informant” information about changes in students’ knowledge and attitudes. Copies of the questionnaires can be found in Annex B.

Questionnaires were distributed on a quasi-random sampling basis, since a pure random sample was not feasible in light of the constraints noted above. JAR operates through 31 regional offices. To keep the sampling exercise more manageable, the team used a random number generator to identify a subset of 15 regions to which questionnaires might be sent. These are shown in Annex C. JAR then identified a further subset of districts and schools in which teachers, administrators and students were still available after the school year to respond to the sample. An “X” identifies the final subset of regions polled in the Annex C table. These correspond to white circles on the below. Although this pragmatic compromise with randomness resulted in the omission of some regions, notably in Siberia and the Russian Far East, it greatly expanded the database and geographic profile of the evaluation.

Questionnaires were promptly returned and by the interview stage, the team had received total samples of 169 students, 22 teachers and 21 administrators, respectively. Although the team did not ascertain the final response rate, it is believed to be between 80% and 100%.



### 3. Findings

#### 3.1 Context

Interviews with USAID/Russia staff were in the context of the impending end of the present grant period in conjunction with the recent formal shift of the project from the economic to the democracy portfolio and implications this might have for the Mission's decision whether or not to continue with a follow-on grant, and if so, for what purpose? While no one expressed doubt about funding the project under democracy, the interviews and an informal poll of relevant USAID/Russia staff suggest that a clear central purpose has not yet been identified, articulated and agreed upon by the mission other than that in some ways it contributes "to both" democracy and economic reform. As indicated in the comments in Annex D, some perceive the business and entrepreneurship aspects as the identifiable characteristic. Others stress values and skills and still others the civil society dimensions of the program. These differences may reflect the fact that the mission's purpose in funding JAR has itself changed over time. Initially supported chiefly to distribute JA kits widely, in support of the mission's economic portfolio, the indicator (participation) still reflects that earlier purpose of large output rather than impact on economic literacy, attitudes or broader civil society objectives. A proxy indicator for that purpose might be that JAR students win a lot of international competitions.

At least one key informant argues that JAR is really a civil society project because it teaches that business should be socially responsible. “When you talk to students it is obvious how different they are from others.”

“The role of JA can also be formulated as transforming children approaching voting age by giving them leadership and problem-solving skills and helping them become concerned and engaged citizens capable of solving problems with their own initiative.”

Director, USAID/Russia Office of Democratic Initiatives.

There is a widespread sense that the courses teach leadership and problem solving. One key informant feels that the distribution system works smoothly, and for that reason JAR may be a good mechanism for reaching youth around the country.

Following the November 2004 evaluation, focus in the mission has been on capacity-building, with emphasis on the role of regions, the capabilities of regional boards to raise funds and attract local support. Local, in-kind contributions are increasing over time as more and more interest develops in JA. Some speculate that JA could exist without USAID funding because they have government adoption of the program (in some places) and more businesses recognize and support JAR. In line with JAR’s own thinking, at this juncture focus appears to be shifting away from distribution of materials per se and toward institutional development.

### 3.2 Administrators and Teachers

Teachers and administrators indicate that JAR participation has changed students’ behavior, noting an increased level of motivation as well as self-confidence among program participants. Some cite the higher percentage of students attending economics related and other competitions, and better overall results are achieved. One noted that former students return to school every year in February and they always emphasize how indispensable the JA program was for their economics education and how applicable it was for their future studies.

Relations with JAR differ among the schools. One indicates that it relies mainly on the Moscow Institute for Open Education, which is under the supervision of the Ministry of Education, rather than with the JAR Moscow office, finding it difficult to communicate through the website. Others also seemed to be not well aware of the website or what it might offer. By contrast, another described direct cooperation with JAR Moscow office as excellent, providing support, invitations and funding for students competitions and travel, as well as conferences for teachers where teachers get the opportunity to exchange experience with their colleagues and guests from JA Worldwide. The teacher regularly corresponds with the JA office through email, and visits the web-site at least once a week to get the news on her

own. Another has contacts with both JAR and the school district, working closely with the methodologist [curriculum development specialist] at the Moscow Institute.

Perhaps as a reflection of their satisfaction with the program, a recurrent observation among teachers and administrators was a perceived lack of training opportunities and at least occasional shortage of materials. Some feel that it is difficult to obtain information about training. Others indicate that available training does not keep up with the number of new teachers. Others who have been trained say that the training is not long enough, that they could use more and that it should be periodically repeated even for the “old” teachers in order to refresh their knowledge and learn more. Others note that, for example, geography and math teachers would like to add a JA unit in their courses and/or use new methods in their classes, but not enough hours of training are available). In one district, all 170 schools have at least some economics. “I wish that all teachers could go through this training.” “To keep up in the future, there must be a corps of professional trainers. We cannot do it ourselves. There is lots of demand”.

Teachers and administrators indicated a high level of satisfaction with the training materials and methods, though shortage of appropriate training materials was cited a number of times, compelling teachers to photocopy material. Other aspects of the issue are reflected not in the quantity of materials but the appropriateness of some of them, such as a lack of entrepreneurship study books and the fact that Russia is not at all mentioned in the International Markets program. One observed that the Personal Economics program has not been adapted for Russia, nor has coverage of some labor market topics. One school holds instruction in English and experiences difficulties in obtaining materials. At another school, the team observed that the economics text being used was a well-worn 1995 edition. Another explained how complicated it is to order materials through the Moscow educational system. “Teachers do not know who to send their request to. Books for the whole district (2 million people) come to the warehouse, and are distributed to different schools. But there is no mechanism in place for every school to order the exact number of books needed and get it at the time when they need them. For example, after implementing Our City program, schools need to begin right away with Our Region, but [discover that] they cannot get books for months after.”

Only one school has a businessperson come to class on a regular basis and provide consultation and the students are very enthusiastic about that. The other two schools would very much like to have businesspeople involved in JA, but for various reasons have been unable to establish such contacts, citing the latter’s busy schedules on one hand and “not knowing the structure about how one does it” on the other.

Questionnaire responses were received from 21 school administrators representing 19 different schools in 14 cities. Of these, one school had been teaching JA courses for one year, two for two years and 18 for three or more years. JA course coverage by grades ranges widely from school to school, with grades 9 and 10 being the modal response (23.8%), followed by grades 9

to11; 1 to 10 (19%); and 9 to 11 (14.3%). Other responses included 1 to 8 and 1 to 11 (9.5% each); 1 to 6; 2 to 11; 5 to 11; 8 to 11; 9 and 10 (4.8% each). Nineteen administrators (90.5%) replied that they consider teaching economics and business skills in secondary schools to be very important while the remaining two deem it somewhat important. Thirteen (61.9%) reported that they plan to increase the number of JA courses in their school in the near future, while 8 (38.1%) do not.

In an indirect attempt to ascertain whether the courses have the desired impact, the team asked Administrators whether they consider JA courses to be effective in developing business skills for senior grade students. Ten (47.6%) consider the courses to be very effective and eleven (52.4%) consider them to be somewhat effective. None replied that they were only a little effective or not effective at all.

They were then asked whether they have noticed a change in attitudes about the market economy among students who participated in JA courses. Fifteen (71.4%) replied that they had noticed a lot of change in students' attitudes, while an additional six (28.6%) had noticed some change. No one responded that they had seen no change in attitudes.

In an attempt to gain some insight into possible spillover effects of JA courses and methods, administrators were asked whether they noticed students getting involved in any other kinds of activities at school or in the larger community after they started taking JA courses. Nineteen (90.5%) replied that they have noticed this while 2 (9.5%) have not. Examples cited include: participation in various competitions in economics and other disciplines; "ideas fairs"; formation of a student self-governance board [student council]; organizing Victory Day celebrations; taking part in career days; preparing class meetings and excursions; participating in class management; participating in "School Republic"; participation in regional research conferences in economics, social studies and regional studies; marathons and "fairs".

Asked what specific skills students have acquired through participation in JA courses, administrators responded:

**Table 1**

Due to JA course our students have learned:	Strongly Agree	Agree	Disagree	No Answer
	Percent	Percent	Percent	Percent
To be Responsible to Keep Deadlines	38.1	57.1		4.8
To Work Independently and Make Decisions	42.8	52.4		4.8
To be Self-Confident	33.3	57.1	4.8	4.8
To Work on a Team and Value Others' Opinions	47.6	47.6		4.8
To Communicate Better and Express Your Opinion Freely	76.2	9.5	9.5	4.8
To Decide About a Future Profession	57.1	23.8	9.5	9.6

Finally, administrators were asked which JA Programs were most beneficial for students. Their responses are combined with those of students in Table 5, below.

Questionnaire responses were received from 22 teachers from 13 towns and cities, representing 20 schools. Of these, 18 (81.8%) had been teaching the JA course for at least three years, three (13.6%) had taught JA for two years and one (4.5%) for only one year. The average length of experience was 2.8 years. Asked for the typical length of JA programs in their respective schools, 16 (72.8%) replied that it is three or more years, three (13.6%) two years and three one year, for an average length of 2.6 years. Asked to rate their students' interest in learning business and economics at the *beginning* of the JA course, 34% replied "very interested", 50% "somewhat interested", 9.9% "neutral" and one indicated "a little interested". By contrast, when asked about student interest in the subject at the *end* of the JA course, 91% of the administrators rated it as "very interested" and 9% as "somewhat interested". In addition to students' *interest* in the subject, administrators were asked to evaluate the increase in students' *skills* in economics and business due to JA participation. Eighty-two percent felt that skills improved "a lot" and the remaining 18 percent judged that skills had improved "somewhat".

Teachers were then asked to judge the change in student *attitudes* toward a market economy as a result of JA participation. Fifty percent noticed "a lot" of change and 46% "some change", while one person did not respond. Eighty-two percent of the teachers responding have noticed JA students getting involved in other kinds of activities at school or in the wider community, while 18% did not observe this. Teachers cited activities similar to those noted by administrators, including: participation in regional and national economics and entrepreneurship competitions; "Day of the City" fair; creating a private school theatre; and sponsoring a school football team [with student company profits?]. One replied, "Now school companies take care of all extracurricular work."

Like administrators, teachers were asked about the impact of JA courses on certain of their students' skills. The responses were as follows:

**Table 2**

Due to JA course our students have learned:	Strongly Agree	Agree	Disagree	No Answer
	Percent	Percent	Percent	Percent
To be Responsible to Keep Deadlines	59.1	31.8	9.1	0
To Work Independently and Make Decisions	31.8	68.2	0	0
To be Self-Confident	40.9	40.9	9.1	9.1
To Work on a Team and Value Others' Opinions	45.5	54.5	0	0
To Communicate Better and Express Your Opinion Freely	63.6	36.4	0	0
To Decide About a Future Profession	63.6	31.8	4.5	0

### 3.3 Students

Interviews with students and school officials began with an open-ended question about what are the most important benefits of participating in JAR. Responses tended to be the same among the three schools and different grades. Students are very supportive of the program in general and speak highly about the quality and usefulness of knowledge acquired. A number of students indicated the desire for more JAR, but were not sure if this means a wider variety of courses or more years of study. In particular they mention: the Applied Economics program, Business ethics, International markets, Personal Economics. Students are satisfied with the overall quality of working materials and especially the way different topics are presented: case studies, preparing business plans and tests. Students noted that they like the fact that they can apply what they learn in everyday life.

“The program helped me find a place in life and determine my future profession. Since it is useful to me it is useful for Russia.”

“I can now understand the news about the Russian economy, write my own resume’ and understand client-customer relations.”

JAR students interview comments

Some noted that JAR provides knowledge necessary for their future. Others view it as an interesting program and unique opportunity to discover new ideas, to be more flexible, cooperative, and responsible and learn what is happening in the world economy and helpful in developing communication skills as well as language skills in addition to acquiring knowledge how to open one’s own business and become financially independent. An extended sample of quotations from students can be found in Annex E.

When asked what they think about JA teaching methods, students almost unanimously agree that teamwork is something they enjoy and had never previously had a chance to practice at school. Students value case-studies, debates and simulations. Some emphasize the opportunity to be creative, allowing them to express their feelings, thoughts, learning how to be practical and proactive, to engage in the decision making. Other students value having discussions and even engaging in arguments with their teacher.

“We learn with pleasure because the atmosphere is different from other subjects.”

“I like that it is set up differently. There is teamwork and all students are united. We can ask for extra information. I [even] wanted to stay after class!”

“The work seems easy. Even complicated topics like cycles of production are easy to understand.”

“I wish that other classes would copy the JA method of implementing projects as a learning tool (geometry, IT and history).”

JAR students interview comments

Typical comments highlight: “a different atmosphere,” “not boring like other subjects,” “not having to memorize pages and pages by heart” and “teaching materials [more user friendly].” They also cite: acquiring analytical skills (being able to see cause and effect); decision-making (applying different concepts); acquiring skills to decide what career to choose by learning what the modern economy needs are and will be in Russia. A number noted that JAR was helpful to them in choosing the type of university education and profession they seek. Some students reported that they have already made a decision to study economics after high school as a result of participation in the JAR program.

Asked whether JAR has an effect on other courses in the curriculum, students in one school noted that other classes are copying the JA method of implementing projects as a learning tool (for example, geometry, IT, history). A history class used a simulation of the 1905 Duma (Russia’s Parliament) where students role-played events. In one school, groups have debates (environment, for example, where they simulate “locating a plant”). When asked how they would improve the program, students in one school recommend that it should become mandatory.

Student companies generate a great deal of enthusiasm, as do the regional, national and international competitions. One group showed the team an impressive business plan for their company and explained that they had traveled to Canada for a competition, whereupon they established a correspondence and trade with a Canadian team, exporting and importing their respective products (Russian souvenirs for the Moscow company). The students noted how this experience taught them a great deal about presentation skills, knowledge of how to run a company and cooperation. Profits from the company were used to help the school.

The team was struck by the patriotism of many of the students, referenced below and in Annex E. Most of them cited helping their country as a major life goal and very few believe that they will leave Russia to live in another country.

Comment: “Your views seem unusual compared to those of the BMW/Mercedes/mansion “New Russians” that one seems to see all over Moscow.

”Response: “We are not unusual. Most students in Russia are very patriotic and only a minority has the BMW mentality.”

JAR students interview comments

The team received 169 student questionnaire responses covering 15 cities or towns and 29 different schools. These form the basis for most of the findings, below. However, one region submitted its responses in pre-tallied format rather than returning each individual questionnaire. While these were useful for most of the descriptive statistics and therefore included in many of the findings below, for other purposes such as cross-tabulation by grade or gender, individual responses were required and these 38 responses had to be eliminated, reducing the effective data subset to 131.

As explained earlier the elementary school year had already ended, so all of the students interviewed and polled were in secondary grades. The breakdown by grade is: 38 percent 11<sup>th</sup>; 27 percent 10<sup>th</sup>; 27% 9<sup>th</sup> and 8 percent 8<sup>th</sup>. Females comprised 58 percent of the sample and males 42 percent. Of these, 9.5 percent had participated in JAR for more than 3 years; 45 percent for 3 years; 28 percent for 2 years and 17% for one year. The average number of years of participation was 2.6 years and the median 3 years. No one indicated participation for more than 5 years.

Asked to rate on a 5-point scale the value of the business skills that they received from participating in JAR, students responded:

**Table 3**

Very Good	Good	Fair	Very Little	None	No Answer
65.1%	31.4%	0	1.2%	0	1.8%

The questionnaire included four simple questions, patterned after a similar JA survey of U.S. students, about basic knowledge of business and economics. Of the 169 students, 88 percent correctly identified the different ways to organize a business, 95 percent correctly identified the definition of “profit”, 95 percent correctly answered the question on the importance of advertising to a business and 99 percent correctly identified the definition of an “entrepreneur”.

Students indicated a high level of satisfaction with JAR courses, with 96 percent of them saying that they would suggest this course to their friends and other students across Russia.

Asked whether the JAR course changed their understanding of how the market economy works, 67 percent responded, “yes, very much” while another 32 percent replied, “yes, somewhat”. Only 0.6 percent answered “no” and one student did not respond.

Students, like administrators and teachers were asked about the impact of JA courses on certain of their skills. The responses were:

**Table 4**

Due to JA course I have learned:	Strongly Agree	Agree	Disagree	No Answer
	Percent	Percent	Percent	Percent
To be Responsible to Keep Deadlines	49.7	43.2	4.7	2.4
To Work Independently and Make Decisions	37.9	50.3	10.1	1.8
To be Self-Confident	32.0	55.6	6.5	6.5
To Work on a Team and Value Others' Opinions	58.6	37.3	3.0	1.2
To Communicate Better and Express Your Opinion Freely	43.2	43.8	7.1	5.9
To Decide About a Future Profession	47.3	36.1	10.7	5.9

Asked if they would like to see the learning methods of JAR classes used in other classes in their school, 59 percent strongly agreed and 40 percent agreed. None disagreed and one student did not respond.

"When I meet a friend and learn what they do not know, it bolsters my self-confidence."

"I always feel I am much better educated than students of my age and even older . . ."

JAR students interview comments

Administrators and students were each asked to indicate which program components they think are most beneficial for students and appropriate for secondary school. Cross-tabulations for different groups are shown in Table 5. The first column includes administrators' replies while all other columns refer to students. The first two columns indicate that by a nearly two-to-one margin both students and administrators rate the basic JA Economics course as the most beneficial, with 66 percent to 71 percent listing it in their responses. However, this differs among regions: in Moscow although it is still the most frequently cited course, only 48 percent of the students singled it out compared to 70 percent in other regions. The percentage of students listing JA economics increases both with grade level and number of years' participation, perhaps simply a reflection of their direct exposure to the course. Although administrators include Banks in Action, a notably small percentage of students (the most advanced) include it on their lists. The Student Companies program is popular, especially among students in higher grades and outside of Moscow. The same may be said about the Management Simulation course, which is one of the few that reveals a distinct difference between male and female students. Career and Life Planning is mentioned more often by students than administrators and appears to increase significantly as they approach graduation. By contrast, Personal Finance ranks relatively lower overall but appears to be especially popular among 9<sup>th</sup> graders. There is a sharp distinction between administrators and students on Seven Steps in World Economics, with nearly forty percent of the former citing it and only a few students mentioning it. Beyond this core of courses, most others receive very little note by either administrators or students.

**Table 5 Percentage of Each Group Listing Each Course as Most Beneficial**

	Adminis- trators	All Students	Gender		Grade				Years Participated in JAR				Regions	
			Males	Females	8	9	10	11	1	2	3	5	Moscow	Other
<b>Number of Respondents</b>	21	169	53	78	12	44	31	44	21	34	59	16	21	110
<b>JA Economics</b>	71.4	66.3	67.9	65.4	50.0	56.8	80.6	75.0	28.6	55.9	81.4	81.3	47.6	70.0
<b>Banks in Action</b>	28.6	14.8	7.5	13.2	0.0	13.6	3.2	9.1	4.8	5.9	3.4	31.3	9.5	8.2
<b>Student Company Program</b>	38.1	37.9	45.3	41.0	62.5	36.4	35.5	54.5	0.0	29.4	54.2	81.3	23.8	46.4
<b>Management and Economics Simulation (MES)</b>	28.6	33.1	39.6	23.1	25.0	25.0	38.7	31.8	0.0	38.2	28.8	43.8	0.0	35.5
<b>Career and Life Planning</b>	28.6	34.9	39.6	42.3	0.0	27.3	38.7	59.1	9.5	29.4	57.6	37.5	38.0	41.8
<b>JA Connections</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.0	0.0	0.0	0.0	0.0	0.0
<b>7 Steps in World Economics</b>	38.1	0.6	0.0	1.3	0.0	0.0	3.2	0.0	0.0	0.0	1.7	0.0	0.0	0.9
<b>Personal Economics (Managing Personal Finances)</b>	14.3	21.9	30.2	26.9	0.0	50.0	16.1	22.7	0.0	14.0	30.5	25.0	33.3	27.3
<b>Entrepreneurship in Action</b>	4.8	1.2	0.0	2.6	12.5	0.0	0.0	2.3	47.6	14.7	3.4	0.0	0.0	1.8
<b>International Economics (Markets)</b>	4.8	2.4	1.9	3.8	0.0	0.0	12.9	0.0	0.0	0.0	6.8	0.0	19.0	0.0
<b>Business and Tourism</b>	4.8	1.8	0.0	3.8	12.5	0.0	3.2	2.3	0.0	0.0	1.7	0.0	0.0	2.7
<b>Esse</b>	0.0	1.2	1.9	1.3	0.0	0.0	0.0	4.5	4.8	2.9	3.4	0.0	0.0	1.8
<b>Our Family</b>	4.8	4.1	0.0	8.9	0.0	4.5	0.0	11.4	0.0	0.0	8.5	0.0	33.3	0.0
<b>Our Region</b>	4.8	4.1	0.0	8.9	0.0	4.5	0.0	11.4	0.0	5.9	8.5	0.0	33.3	0.0
<b>Our City</b>	4.8	4.1	0.0	8.9	0.0	4.5	0.0	11.4	0.0	5.9	8.5	0.0	33.3	0.0
<b>Our Country</b>	4.8	4.1	0.0	8.9	0.0	4.5	0.0	11.4	0.0	5.9	8.5	0.0	33.3	0.0
<b>Econ in English Language</b>	0.0	4.1	3.8	6.4	0.0	6.8	12.9	0.0	0.0	8.8	6.8	0.0	33.3	0.0

#### 4. Conclusions

1. Has there been progress in implementation of the recommendations of the previous evaluation team (Annex I)?

To some extent this is difficult to judge because several of the recommendations were for USAID to respond to specific JAR funding requests and at this relatively early date it is not clear that these have been put forth in that context. Nevertheless, discussions with the mission and JAR indicate that the recommendations are being taken seriously. The USAID project manager (CTO) has been working closely with JAR to follow up on the report. It appears that JAR's task has been made easier in some respects by having the force of new JA Worldwide policies behind it, for example in structural changes such as getting more business participation on regional boards and that progress in these areas will need to continue until the October 2009 deadline for meeting JAR standards.

As noted above, there is some progress in planning as well, as it pertains to the regions. What was less clear to the team was the extent to which conscious long-range planning extends to the *system* (as opposed to Moscow as another regional office) and the interrelationships and respective roles of Moscow and the regions, a cohesive plan for sustainable growth of the system as a whole, and a staffing and organizational plan to implement such a plan.

The same may be said about a long-range plan for financial sustainability. While JAR has attracted some prominent support in the business community and has had some success in fund-raising within the constraints of "Russian realities", it appears that at this stage more work is needed related to that recommendation.

Work has begun on the recommendation for JAR to do more impact analysis. Data collection has begun, but it is not clear that JAR yet has, or has devoted, the time and resources necessary to fully analyze and publicize the results and may thereby be underutilizing an important tool for fund-raising and planning.

2. Does Junior Achievement Russia have the intended impact on students' understanding of, and attitudes toward a market economy?

Interviews with teachers, students, administrators and informed USAID staff all indicate that JAR has been effective in changing students' attitudes and understanding. This was supported by the questionnaire responses where more than half of the teachers and nearly three-quarters of administrators report observing a lot of change in students' attitudes, while nearly all of the remainder have seen at least some change. No one responded that they had seen no change in attitudes. Nearly 98 percent of students say that JAR has changed

their understanding of the workings of a market economy at least somewhat, of which two thirds replied “very much.” This tracks with the finding that students indicate a high level of satisfaction with JAR courses, with 96 percent of them indicating that they would suggest this course to their friends and other students across Russia.

3. Does the Junior Achievement Russia program have spillover effects on students or their schools?

Interviews and questionnaire results all indicate that JAR does have some spillover effects beyond simply learning the workings of a business or the economy. These include a sense of self-confidence and group participation. Often, these efforts seem not to deviate far from the JAR curriculum, for example business competitions, but in some cases there is a more generalized sense of participation (e.g., starting a school theatre, heightened awareness of one’s community and problem solving). It is not clear whether the program makes leaders or if it attracts natural leaders and teaches them the *techniques* of leadership. Whichever is the case, results indicate that JAR does develop leadership.

4. Does Junior Achievement Russia support the democracy strategic objective as the mission intends?

As the mission began closing out its economic growth portfolio in 2004, budgeting and oversight were shifted to the democracy strategic area. One question to be addressed by the team in this evaluation was therefore whether JAR is appropriately identified as a democracy activity, especially if it does not alter its program. Put bluntly, “is it democracy or is it business?” The response to the question could be that in a pure sense, “it is neither” or “it is both.” The impact of JA is indirect and very long term. In that sense it has no immediate impact on either area but in the long run may affect both. Both interview and questionnaire results indicate that students, teachers and administrators clearly see JAR as a *civic education project*, albeit with core economic content. Tabulated results and statements in interviews reinforce this interpretation of JAR as an instrument for developing what many would refer to as “good citizens” with community consciousness and a sense of social responsibility and not solely a “new generation of capitalists.”

Asked what their goals in life were, a group of 9th through 11th graders responded with statements such as:

"To become a respected member of society and support my parents because that is what they have done for me"

"I want my children to be proud of me and to be remembered as a good person."

"I want to fight corruption. We need to understand people and prevent dishonest people from gaining positions of authority."

"President Putin congratulated our class and said that we are the future of Russia. We really feel that way. We are responsible for the next generation and we want to make life better for our kids."

This suggests that JAR is indeed a contributor to the mission's democracy objective.

5. Should Junior Achievement Russia expand or modify its program in light of the fact that it is now funded under the mission's democracy strategic objective?

The findings indicate that JAR is having an impact as a civic education project in terms of skills, attitudes and community consciousness. There are programs within the JAW portfolio that can be used to emphasize this dimension rather than, say, more "companies" and JAR is already piloting one of these. Beyond such shifts in emphasis within JAW, it would not be advisable to move strongly in the direction of creating a significantly revamped, and perhaps artificial, "democracy project". The reasons are both substantive and practical. Evidence gathered by the team, for example the fact that the general economics course is by a wide margin the most frequently cited as the most beneficial course by both students and administrators, indicates that, although business may be the "hook" that captures students' initial interest, JAR is having a definite impact on its participants as a *civic education* project and as such therefore fills an important niche in the mission's democracy portfolio. This view was captured in one interview with a key informant, who feels that JAR is really a civil society project "because it teaches that business should be socially responsible. When you talk to students it is obvious how different they are from others."

Even allowing for the fact that there may be a considerable degree of self-selection (most students had at least a moderate interest in economics and business even before joining JAR), substantial widening of national participation in JAR would seem to be a more effective way by which to develop informed citizenship in the long run than proliferating the number of "democracy courses" offered by JAR.

The practical reason for not substantially revamping the program in the direction of democracy is that, in the opinion of the team, JAR is already straining its resource capacity - - - financial, staff and administrative - - - to support the present program and provide access over the vast territorial reaches of Russia. Achieving its goal of a 20 percent annual increase in participation will further strain these resources. A significant shift in direction may dilute the impact that it is already having.

6. Is Junior Achievement Russia likely to be sustainable when USAID funding ends?

The answer to this question depends in part on the definition of “sustainable”. One might ask, “Sustainable as *what?*” Interviews as well as results of the earlier evaluation suggest that JAR may have achieved, or can reach, one threshold of sustainability, namely financial, in terms of distributing materials using corporate support. As revealed in the team’s interviews with teachers and administrators, in some school districts the JA courses have become the core of economics education, and in turn economics education has become an integral part of the social studies curriculum. In others, it has become an important educational tool, even if not formally integrated into the curriculum. It is therefore plausible to project a medium-to long-term, sustainable situation in which such an institutionalized demand at some level for JAR courses can be met with corporate sponsorship of materials distribution and perhaps training. Whether such a system would have the capacity for rapid future growth is not obvious.

Is the program sustainable at levels beyond this threshold? Since it is not a consulting organization, it is unlikely to be fully self-financing. As JAR points out, JA Worldwide (JAW) operates on 50% contributions, 20% program charges and 30% materials sales. JAR does not yet utilize program charges or materials sales, so over time, as “Russian realities” permit, there is in principle some room for expansion in these areas and if donor funding is replaced with other contributions. Continued long term financial planning is important.

Is the program sustainable at still higher levels, as a constantly evolving, growing, organizational system that would achieve significantly more national impact? JAR indicates that its goal is to reach 20% of students across the country instead of the 2 or 3% that they serve today. It is difficult to see how this can be achieved with the present organizational and financial structures that appear already to be overburdened. JAR’s situation is reminiscent of that of a private business that has enjoyed unusual success, grown rapidly and opened several branch outlets but now faces the decision as to whether to “go public” as a perhaps exploding franchise operation or to remain a successful, although more limited, operation. This dilemma returns JAR to a number of issues raised by the previous evaluation team.

7. What issues remain to be addressed that would increase the effectiveness of Junior Achievement Russia?

In addition to the organizational and planning issues raised in the earlier report, this team encountered some additional questions that merit further investigation or clarification. The first concerns the interface between JAR and the Moscow Institute for Open Education. In interviews some schools indicated that they depend primarily on the Institute for their communication with JAR while others relate directly to JAR. With the large number of schools adopting JA courses as

their core economics curriculum, (85 of 115 schools in one case), it appears that there may be prospects for increased JAR sustainability through greater synergy and more systematic relations between JAR and the Institute.

JAR has created a strong demand for its programs, perhaps larger than it can accommodate. Interviews elicited a number of comments about shortages of materials and of training opportunities, the latter reflecting a real eagerness among teachers for more exposure and to have more of their colleagues trained. The team was unable to pinpoint a primary bottleneck in this regard. JAR explained its system of preparing its annual training program with the regional directors. Despite these efforts, the demand for training exceeds availability and despite its current publicity efforts, at least some schools feel that they are not aware of training opportunities. One teacher was unsure that JAR was evening offering training. There are at least spot shortages in availability of training materials. Persons interviewed that the reasons lie on both the demand and supply side. Ordering materials for a Russian school district is cumbersome, slow and subject to errors in demand forecasts. Yet, on some occasions the difficulty has been in obtaining materials from JA due to lack of availability. Without assuming fault on either side, it seems that the distribution system, especially where the materials are part of the core economics curriculum, warrants closer scrutiny.

JAR appears to be far ahead of its clients in terms of computerization of the system. In principle, such things as news of training opportunities and registration are available through the internet. Yet, as already noted, some claim that they are unaware and need to rely on other sources. The team believes that at least part of the gap is due to lack of appropriate computer access. Computerized classrooms for JAR use are still a rarity, even in the more elite schools. The most consistent report that the team got from teachers is that they rely on their home computer for online service and bring materials to the classroom. JAR has initiated a "Virtual Library" of materials. While this appears to be an appropriate and farsighted way to create a cost-effective means of distributing up to date materials to millions of students over vast distances, it seems doubtful that any but a relatively small number of classes will have the computer access necessary to take advantage of this innovation for some years to come.

## **5. RECOMMENDATIONS**

Taking into consideration the positive impact of JA Russia's on students' lives and education, and its potentially large contribution to civic education and "good citizenship," the Evaluation Team recommends that USAID/Russia continue support to the JA Russia program as a contributor to its democracy portfolio. If fully rolled out to (perhaps) ten to twenty percent of the student population, the project appears to have the potential to achieve significant national impact in developing a new generation of economically literate, socially aware and socially responsible citizens and community leaders. Several forms of support could be

used in various combinations. In addition to direct mission budget support the mission might more actively employ the Global Development Alliance (GDA) mechanism or assist JAR in identifying a “White Knight” supporter.

However, such active support should be contingent upon and aimed at addressing some constraints. The team is concerned about the capacity of JAR, as presently constituted, to achieve this impact. In the team’s opinion, JAR is at a crossroads and faces major decisions about its future. It appears to have reached a certain initial threshold of sustainability and could, with more aggressive fundraising and sponsorship, perhaps maintain a program at or about the current level of operations more or less indefinitely. However, the team feels that JAR manifests signs that it is already operating at or above full capacity and we are skeptical about the prospect for significant future growth if the capacity constraints are not reduced or alleviated. We believe that some of the signs are: at least some shortages of materials; considerably fewer training opportunities than the present pool of teachers would like, to say nothing of accommodating a five or tenfold increase in teachers; and a seeming direct time tradeoff within JAR management between fundraising and program design, development and expansion, with the latter receiving progressively less attention. JAR’s notable success to date has been largely driven by the enormous energy, dynamism and dedication of a relatively small number of people. But, in pursuit of its stated growth objective, the ever-expanding complexity and size of the organization seems destined to present a constantly increasing span of control challenge. The issue then becomes one carefully examining the *institutionalization* of aspects of JAR operations for the long term.

JAR’s dilemma is neither new nor unique. It is reminiscent of a small family business that achieved unexpected initial success and growth, opened several branch operations that also grew and prospered and yet demand still far exceeds supply. The owner now faces the decision of whether to “go public” (or to franchise the business) and achieve continued rapid growth or to retain itself as a smaller organization and plateau near its current level of operation.

Some of the team’s recommendations, therefore, echo and reinforce those of the previous evaluation.

**Recommendation 1: That JA Russia, USAID and JA Worldwide soon engage with each other in a goal-setting exercise to identify and articulate a shared long term vision for the ultimate state of Junior Achievement in Russia.**

This recommendation follows from the team’s postulate that JAR is at a significant decision point at which it may soon need to choose between a path of rapid growth and what that implies on one hand and consolidation and management of its present programs and structure on the other. Choice and implementation of other recommendations, and those of the previous team, will

depend in part on which long-term path is chosen. The team strongly urges that JA Worldwide be included in this exercise. The reasons are not only to take advantage of JAW's vast pool of resources and expertise but also to recognize that as the second largest JA program in the world, the future of JAR may exert a strong feedback affect on JA worldwide. Since the "poll" of key USAID staff about the roll of JAR revealed some differences in perception, the USAID mission could use this exercise to sharpen and clarify its own purpose statement and program theory for the project. This implies the importance of revisiting project monitoring issues, including the continued use of indicators matched to the original materials distribution objective of the project.

**Recommendation 2: That JA Russia accelerate work on developing a strategic plan, which includes a fundraising plan.**

This recommendation reinforces that of the previous team, but is based on the best practices and literature on NGO development that suggests that maturing organizations should have a strategic plan or a so-called systematic process to respond to changes in the dynamic and hard to predict environment. It also follows from Recommendation 1, as it is doubtful that annual program plans will accommodate JAR's needs, especially if it chooses a growth path. It is also not apparent that JA Russia's planning, even for the long term, is yet particularly *strategic*.

**Recommendation 3: That JAR, through the Moscow office re-engage in the Moscow region with the large number of schools participating in the JAR program.**

Although it is understandable that the Moscow region not be given preference over other regions, information suggests that presently insufficient support and attention is being provided directly to support to the region. This is manifested by reports that much of the responsibility for managing training and materials dissemination falls to three regional methodologists and planning for the region's needs is not clearly separated from that for the country organization as a whole.

**Recommendation 4: That JA Russia prepare a plan for soliciting input for its products and services, along with its existing system of tracking performance by collecting data on student participation and distribution of materials.**

While the interviews and surveys provide information about the excellent and necessary contribution of the JA Russia's program in boosting the economics curriculum and introducing more interactive teaching methods at schools, further steps can be taken to make ongoing improvements in the program by being more open and interactive in accumulating suggestions of students, teachers, administrators, and other stakeholders for bettering the outcomes. The feedback

can include such things as the quality of teaching materials and training opportunities.

**Recommendation 5: That JA Russia work to increase the involvement of Russian business community in the program both nationally and in the regions.**

Again, the team reinforces a recommendation made in the earlier evaluation. It is encouraging that some steps have been taken, such as including business people on regional boards, but there would seem to be many more opportunities for taking advantage of this valuable resource. Besides diversification of income resources via increased financial support of local and international firms and corporations, JA Russia may try to utilize local business leaders more aggressively to participate in and become the spokespeople of the program. Students clearly want, and teachers would appreciate, more exposure to real businesspeople in the classroom. Team interviews disclosed some very positive feedback regarding the participation of businessmen in class discussions. Options may be either to train teachers to be able to work with businesses directly or charge someone in each affiliate and also the national office to serve as a liaison between the teachers and business community.

**Recommendation 6: That JA Russia, JAW and USAID work together to consider how the Moscow Institute for Open Education might be more systematically integrated into the JAR dissemination system.**

The team was struck by the apparent potential of achieving national rollout since such a large percentage of (Moscow) schools have adopted JA materials as part of the core economics curriculum. Yet, this interface does not seem to be routinized or institutionalized; the committee understood that it depends largely on the initiative of, and relations with, some of the methodologists. This would seem to be a promising way of achieving national rollout of materials and concepts, and the team encourages JA and USAID to consider this avenue further.

**Recommendation 7: That JA Russia, JAW and USAID work together to consider how better to streamline distribution mechanism for placing JA materials in schools.**

The team received reports of shortages, some chronic, some spot, of JA materials. It was not clear whether this is due to a shortage of supply, difficulties of forecasting demand, or both. Again, JAW specialists may be of some assistance in helping to identify and alleviate shortages of materials that are in very high demand.

**Recommendation 8: That JA Russia, JAW and USAID work together to explore the best way to develop and roll out the “Virtual Library” and the electronic distribution of materials.**

In identifying electronic media and internet-based distribution, JAR seems to have identified a cost-effective and timely means of distributing its materials, over huge distances so that more attention and resources could be used for future product development and updating. However, JAR seems to be far ahead of its market with this innovation. Information available to the team suggests that classroom computer access for JAR students is very rare and may be so for some years to come. In the schools interviewed by the team the teacher or a student often had to use their home computer for access and then bring the material or information to the classroom. This presents a serious constraint on their ability to take advantage of material updates and upgrades as well as keeping up to date with announcements. While the increased use of the internet is a forward-looking innovation for the program, JAR, USAID and JAW should discuss “appropriate technologies” that may achieve some of the intended results during a substantial bridge period before schools are wired.

**Recommendation 9: JA Russia and USAID should not move excessively in the direction of tailoring JA more toward a democracy objective, but rather to explore means of integrating it into a wider mission civil society portfolio wherein each element reinforces the other.**

JAR materials already provide important “civic education” or “citizenship” training. JAR is already strained to provide these in adequate quantities to meet demand and adding new, specialized, courses in “democracy” would be an unnecessary and the added burden could simply dilute the effectiveness and impact of the ongoing program. JAR is moving cautiously before changing its focus and this caution should be encouraged. However, there is potential for fostering mutually beneficial synergies with other youth-oriented projects in the mission’s civil society portfolio to which JAR could bring (for example) its large and growing base of active young Russian citizens.

## **Annex A**

### **Interviews held between June 20 and June 24, 2005**

1. School # 769, Northwest Moscow 0900, Monday June 20  
  
Ms. Elena Nikolayevna Kosimova, Teacher  
Ms. Valentina Nikolayevna Ryzheva, Director
2. School # 1279, Southwest Moscow 1900, Monday June 20  
  
Ms. Nadezhda Il'inichna Bykova, Teacher
3. Andrew Kiseliov, USAID/Russia Program Office, 1430, Tuesday June 21
4. Chris Brown, Director, Office of Democratic initiatives, and Marina Mikhailova, Rule of Law Specialist, Office of Democratic Initiatives, 1100, Tuesday, June 21
5. School # 1937, Southeast Moscow 1000, Wednesday June 22  
  
Ms. Tat'yana Nikolayevna Ramazanova, Methodologist
6. Nancy Fisher-Gormley Acting Chief, USAID/Russia Program Office, 1000, Thursday June 23
7. Dr. Nina G. Kuznetsova, Executive Director, JAR Moscow office, 0200, Thursday June 23

## Annex B

### Questionnaires

#### ADMINISTRATOR SURVEY for the evaluation of Junior Achievement Russia Program Summer 2005

- 1) Please write in the name of the city you work in \_\_\_\_\_ and your school number \_\_\_\_\_
  
- 2) How many years have you had JA courses taught at your school?
  - a. 1 year
  - b. 2 years
  - c. 3 years and more
  
- 3) Which grades are JA courses being taught at your school?
  - a. 10<sup>th</sup> and 11<sup>th</sup>
  - b. 9<sup>th</sup> and 10<sup>th</sup>
  - c. Other, please specify \_\_\_\_\_
  
- 4) Do you personally consider teaching economics and business skills in secondary school important?
  - a. Yes, it is very important
  - b. Yes, it is somewhat important
  - c. No, it is not important
  - d. There are subjects that are more important for students
  
- 5) Please indicate, which of JA program components you think is the most beneficial for students?
  - a. JA Economics
  - b. Banks in Action
  - c. Student Company Program
  - d. Management and Economics Simulation Exercise
  - e. JA Connections
  - f. Other, please specify \_\_\_\_\_

- 6) **Do you plan to increase the number of JA courses in your school in the future?**
- a. Yes
  - b. No
- 7) **Do you consider JA courses effective in developing business skills for senior grades students?**
- a. very effective
  - b. somewhat effective
  - c. a little effective
  - d. not effective at all
- 8) **Did you notice a change in attitudes about market economy in students who participated in JA courses?**
- a. Yes, I notice a lot of change in students' attitudes
  - b. Yes, I notice some change in students' attitudes
  - c. No, I don't notice any change in students' attitudes
- 9) **Have you noticed students getting involved in any other kinds of activities at school or in larger community after they started taking JA courses?**
- a. Yes, please specify\_\_\_\_\_
  - b. No
- 10) **What is your opinion on the statements below? Please mark your answers.**

**Due to JA course our students have learned**

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>
to be responsible to keep deadlines	?	?	?
to work independently and make decisions	?	?	?
to be self-confident	?	?	?
to work in a team and value other's opinions	?	?	?
to communicate better and express your opinion freely	?	?	?
to decide about the future profession	?	?	?

- 11) **Please use the space below to provide any additional comments that you may have about JA program in your school.**
-

**TEACHER SURVEY**  
**for the evaluation of Junior Achievement Russia Program**  
**Summer 2005**

1) Please write in the name of the city you teach in \_\_\_\_\_ and your school number \_\_\_\_\_

2) How many years have you been teaching JA courses?

- a. 1 year
- b. 2 years
- c. 3 years and more

3) What is the regular length of the JA program in your school?

- a. 1 year
- b. 2 years
- c. 3 years and more

4) On a scale, please rate how interested were your students at the beginning of JA program in learning about economics and business, when “5” means very interested and “1” means not interested at all?

5                      4                      3                      2                      1  
very interested    somewhat interested    neutral    a little interested    not interested at  
all

5) Using the same scale, please rate how interested were you students at the end of the program in economics and business, when “5” means very interested and “1” means not interested at all?

5                      4                      3                      2                      1  
very interested    somewhat interested    neutral    a little interested    not  
interested  
at all

6) By how much did participation in JA programs help increase students’ business and economic skills in your school?

- a. A lot
- b. Somewhat
- c. Fairly
- d. A little
- e. Not at all

**7) Did you notice a change in attitudes about market economy in students who participated in JA courses?**

- a. Yes, I notice a lot of change in students' attitudes
- b. Yes, I notice some change in students' attitudes
- c. No, I don't notice any change in students' attitudes

**8) How do you think JA courses lead students to choose a future career in business or economics?**

- a. A lot
- b. Somewhat
- c. A little
- d. Not at all

**9) What is your opinion on the statements below? Please mark your answers.**

**Due to JA course students have learned**

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>
to be responsible to keep deadlines	?	?	?
to work independently and make decisions	?	?	?
to be self-confident	?	?	?
to work in a team and value other's opinions	?	?	?
to communicate better and express your opinion freely	?	?	?
to decide about the future profession	?	?	?

**10) Have you noticed students getting involved in any other kinds of activities at school or in larger community after they started taking JA courses?**

- a. Yes, please specify \_\_\_\_\_
- b. No

**11) Please use the space below to provide any additional comments that you may have about JA program in your school.**

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**STUDENT SURVEY**  
**for the evaluation of Junior Achievement Russia Program**

- 1) Please write in the name of the city you live in \_\_\_\_\_ and your school number \_\_\_\_\_
  
- 2) What grade are you in?
  - a) 11
  - b) 10
  - c) 9
  - d) 8
  
- 3) What is your gender?
  - a) Female
  - b) Male
  
- 4) How many years have you participated in the Junior Achievement Program?
  - a) 1 year
  - b) 2 years
  - c) 3 years
  - d) more than 3 years
  - e) more than 5 years
  
- 5) Please indicate, which of JA program components you think is the most beneficial for students and appropriate for secondary school?
  - a) JA Economics
  - b) Banks in Action
  - c) Student Company Program
  - d) Management and Economics Simulation Exercise
  - e) JA Connections
  - f) Other, please specify \_\_\_\_\_
  
- 6) On a scale where “5” means very good and “1” means none, how would you value business skills that you personally received from participation in JA program? Please circle your answer.

5	4	3	2	1
very good	good	fair	very little	none

**7) Which of these are different ways to organize a business?**

- a) Sole proprietorship
- b) Partnership
- c) Corporation
- d) All of the above

**8) What is profit?**

- a) Taxes on your business
- b) Money to start your business
- c) A bank loan
- d) The money left after the costs of running your business have been paid

**9) Why is it important to advertise a product?**

- a) To waste money
- b) To inform people about your business
- c) To annoy people
- d) To confuse customers

**10) What is an entrepreneur?**

- a) A circus clown
- b) A person who starts a business
- c) A waiter in a restaurant or bar
- d) A pet owner

**11) Would you suggest this course to your friends or other students across Russia?**

- a) Yes
- b) No

**12) Did the JA course change your understanding of how the market economy works?**

- a) Yes, very much
- b) Yes, somewhat
- c) No

**13) What is your opinion on the statements below? Please mark your answers.**

**Due to JA course I have learned**

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>
a) to be responsible to keep deadlines	?	?	?
b) to work independently and make decisions	?	?	?
c) to be self-confident	?	?	?
d) to work in a team and value other's opinions	?	?	?
e) to communicate better and express your opinion freely	?	?	?
f) to decide about the future profession	?	?	?

**14) How much do you agree with the following statement:**

**I would like to see the learning methods in JA classes used in other classes in my school.**

Strongly Agree	Agree	Disagree
?	?	?

**Annex C**  
**Random Selection of Questionnaire Sample Regions**

<b>Random Number Ranking</b>	<b>City</b>	<b>CITY_ID</b>	<b>Random Number, 1 to 1,000</b>
1	Angarsk	1838	54
2	Moscow	4117	112
3	Tula	2498	166
4	Kazan	4151	170
5	Syktvykar	6192	213
6	Volgograd	899	222
7	Saratov	1429	249
8	Ivanovo	4787	250
9	Yekaterinburg	4696	364
10	Vladimir	4323	391
11	Yaroslavl	5055	394
12	Stavropol	409	418
13	Krasnoyarsk	4259	449
14	Vladivostok	105	469
15	Nizhny Novgorod	4421	488
16	Yuzhno-Sakhalinsk	695	488
17	Kostroma	5116	488
18	Ryazan	3101	567
19	Cheboksary	4317	656
20	St.-Petersburg	5834	697
21	Vologda	5635	711
22	Ufa	3441	716
23	Novokuznetsk	2313	723
24	Novorossiysk	347	761
25	Novgorod	5409	803
26	Vladikavkaz	97	807
27	Voronezh	1506	851
28	Samara	2082	881
29	Abakan	2285	922
30	Pskov	5146	986
31	Novosibirsk	3706	991

## Annex D

### **(Encapsulated) USAID/Russia Views on the purpose of Junior Achievement**

- JA's purpose is to teach kids how to approach business, how to analyze a market, start and run a small business. Our purpose is to encourage the development of an entrepreneurial spirit, new skills in analyzing a society and its needs, and in figuring out how to meet those needs in a freer market. A secondary purpose is to develop small businesses that can serve as self-sufficient advocates of a more decentralized political and economic system.
- To awaken the leadership, problem-solving, community mobilization and entrepreneurial skills of Russia's youth.
- Expansion of innovative education in the areas that are the most important in forging an open and democratic market economy. It includes the following approaches: business skills and leadership; civics and social responsibility; information technologies; institutional strengthening and capacity building.
- To develop an understanding of entrepreneurship and the free market economy in Russian youth.
- Strengthening civil society through the development of a need for economic fulfillment. [ . . . ] Helping to strengthen the desires of Russian youth to achieve goals [ . . . ] through an interactive way of learning (and teaching) which will ultimately fulfill these desires.

## Annex E

### Selected Student Comments

At the end of each session, after the formal interview questions, the team informally asked some open-ended questions of the students, such as: “How important is it to you to be rich?”; “What are the most important things in life?”; “How do your parents and friends feel about you participating in JA?” “What are your future plans?” and “What have you gained from participating in JA?” Selected student responses to these questions from 9<sup>th</sup> to 11<sup>th</sup> graders are given below:

- To be rich is not the main goal, to better realize myself is;
- Becoming rich as a way of helping people in need;
- Being rich gives you opportunity to travel and see the world;
- With more money you can get better education...
- [I] learned things that can be used later in life
- Students should start younger learning these things: “That’s the way the world is”
- I discuss the issues with friends
  
- Our Family [course] gives us knowledge of life and the financial system. Without this, would not be able to [go to university???] next year.
- [JA methods are] much easier to comprehend
- [I] feel pleasure because it is a different atmosphere than other subjects
- [JA is] set up differently - - - teamwork and united. I can ask for extra information. I [even] wanted to stay after class!
- [JA is] very important in terms of knowledge of [how a city functions]. Therefore I am now more aware of what is going on around me in the city
- [JA is] very interesting. It is not true [as some other students think] that economics is difficult, because it [JA] is taught well. I can now talk to adults about these subjects.
- Some school subjects seem not important to life, but our economics course *is* important for life - - - [and] it helped me to see how [other subjects such as] math ties to life. It becomes like one.
- The program helped [me] to find a place in life. [I plan to go to] university to study human resources.
- Now [I] have grown. I once even explained some formulas to my father, who is in business.
- Parents are jealous because they did not have such a course when they were students.
- Parents are surprised that [I] know so much - - - even things they do not know themselves.

- Many friends have not participated in JAR, but they ask about it.
- I can see both the producers' and consumers' points of view [unlike my friends]
- When I meet a friend and learn what they do not know, it becomes so easy for me [i.e., it bolsters my self-esteem and self-confidence].
- [JA should] begin in first grade "when students are fresh and young".

What (aside from obvious things such as family) is most important in life?

- Satisfaction from work.
- A decent life [livelihood].
- To find one's place in life and have an interesting job.
- To become a respected member of society and support my parents because that is what they have done for me.
- To have a decent life. I want my children to be proud of me and to be remembered as a [good] person.
- We are going to become good citizens. Find a job you do with joy and be useful to ourselves and to our country.
- I want to fight corruption. Q: How? A: We need to understand people and prevent [dishonest people] from [attaining positions of authority].
- I want to be educated and in demand.
- I want to be educated and be able to help my country.
- All who study JAR/econ will work not just for themselves but for our country.
- Education is very important to me because I want to help people.
- I want to help Russia, but by building relationships with others [e.g., diplomat].
- It is not always possible to be able to work in other countries but can *help* our country.
- [Ambivalent]. I want to help Russia, but on the other hand I want to experience other countries and cultures.
- It is important to learn from other countries' experiences in order to help Russia.
- I cannot imagine leaving Russia for good, but I may move abroad to get education and money and then return.

[A graduating student's comment on the above]: "We really feel that way. We understand that the graduation speeches we heard are [a lot of high-blown] words, but yet we *do* know that we are responsible for the next generation and we want to make life better for our kids. President Putin congratulated our class [along the above lines] and we are very pleased with that".

Q: Are your views unusual [compared to the BMW/mansion "New Russians" that one seems to see all over Moscow]?

A: We are not unusual. Most students in Russia are very patriotic and only a minority has [the BMW mentality].

### Career Plans

- Not sure if I will be admitted, but want I to go to Academy of Economic Security and fight [economic crimes]
- Going to the Higher School of Economics
- Going to the Financial Academy (finance and credit)
- Going to University of International Relations to study international relations [diplomat?]
- Going to Customs and Tax Academy to study customs and credit [?]
- Not sure, but something about economics because all is connected to economics and business.
- Going to State Academy of Management to study management
- I still have 2 years to decide, but might go into the banking field
- For the future [I] would like to combine business with language studies English, French, German and get involved in international trade or business
- Study econ and other languages
- I hope to open own business, not only for money but so the world can see that Russian people can also be creative
- I want to travel the world and learn languages
- Parents both doctors and [I] also want to be a doctor and have a family business in the health area

## **Annex F**

### **IMPLEMENTATION PLAN**

#### **Phase- 1 September 1, 2002 – August 31, 2003**

##### **A. September 2002 - November 2002**

- Printing of additional 40,000 JA Economics (former Applied Economics) High school program materials.
- Start development of JA Russia a) Virtual library – a compilation of JA program materials, documents and information centered on subjects related to youth entrepreneurship, economics, business, civics and ethics education; b) Virtual fair of young Russian entrepreneurs student companies for their projects and products, and c) Virtual forum for debate and the exchange of ideas and experiences of teachers and students involved in JA activities across Russia;
- Preparation for Printing of the new Student Company program kits with a new IT component.
- Preparation for the 4<sup>th</sup> JA Russia National Student Company Trade Fair;
- Preparation for the 1<sup>st</sup> National “Simple Words” Essay Contest;
- Registration and start of JA Russia National MESE and Banks in Action contests;
- Registration of participants in JA international global curriculum components: MultiMESE, Travel & Tourism.
- Monitoring the Technical support of JA Russia’s Interregional Internet Network;
- Start developing an operational plan to develop the institutional capacity of JA Russia’s regional centers.

##### **B. December 2002 – February 2003**

- Printing Student Company program kits with a new IT component;
- Development of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia (continued);
- Preparation of JA Russia’s Civics program materials;
- Organization of the 4<sup>th</sup> JA Russia National Student Company Trade Fair;
- Organization of the 1<sup>st</sup> National “Simple Words” Essay Contest;
- Preparation for National MESE and Banks in Action Finals;
- Preparation of the International Simple Words Essay Contest;
- Monitoring of JA Russia’s teams participation in the HPGBC Global MESE Contest;
- Organization and monitoring JA Russia’s Job Shadow Days project;
- Organization of JA Russia’s representatives’ participation in the JA seminars and conferences held by JA member nations;
- Monitoring the Technical support of JA Russia’s Interregional Internet Network;

- Development and test an operational plan to develop the institutional capacity of JA Russia's regional centers (continued);

### **C. March- May 2003**

- Printing of JA Russia's Civics program materials;
- Implementation of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of JA Russia Best Overall Student Company participation in the International Trade Fair of young entrepreneurs;
- Organization of the National MESE and Banks in Action Finals;
- Monitoring of JA Russia's teams participation in the HPGBC Global MESE Contest;
- Organization of the 3<sup>rd</sup> Laws of Life Essay Contest;
- Organization of the national the 9<sup>th</sup> Student Company Rally;
- Organization of the International Simple Words Essay Contest;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Implementation an operational plan to develop the institutional capacity of JA Russia's regional centers;

### **D. June – August 2003**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of JA Russia Best Overall Student Company participation in the International Company Competitions and JA Forums of young entrepreneurs;
- Organization of JA Russia's representatives' participation in the JA Intl. Global Conference;
- Preparation of JA Leadership Project;
- Printing of JA Russia's Information materials;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Survey and Evaluation of implementation of an operational plan to develop the institutional capacity of JA Russia's regional centers;

### **Phase- 2 September 1, 2003 – August 31, 2004**

#### **A. September - November 2003**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Preparation for the 5<sup>th</sup> JA Russia National Student Company Trade Fair;
- Preparation for the 2<sup>nd</sup><sup>st</sup> National "Simple Words" Essay Contest;
- Registration and start of JA Russia National MESE and Banks in Action contests;

- Registration of participants in JA international global curriculum components: MultiMESE, Travel & Tourism;
- Publication of supplemental materials related to JA computer, internet and web programs;
- Introduction of JA Leadership Project;
- Introduction of JA Leadership Project;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development of JA Russia's regional boards and regional centers network;

#### **B. December 2003 – February 2004**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of the 5<sup>th</sup> JA Russia National Student Company Trade Fair;
- Organization of the 2<sup>nd</sup><sup>st</sup> National "Simple Words" Essay Contest;
- Preparation for National MESE and Banks in Action Finals;
- Preparation of the International Simple Words Essay Contest;
- Monitoring of JA Russia's teams participation in the HPGBC Global MESE Contest;
- Organization and monitoring JA Leadership Project;
- Organization and monitoring JA Russia's Job Shadow Days project;
- Organization of JA Russia's representatives' participation in the JA seminars and conferences held by JA member nations;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development and expansion of JA Russia's regional boards and regional centers network
- (continued);

#### **C. March- May 2004**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of the National MESE and Banks in Action Finals;
- Monitoring of JA Russia's teams participation in the HPGBC Global MESE Contest;
- Organization of the 4<sup>th</sup> National Laws of Life Essay Contest;
- Organization of the national the 10<sup>th</sup> Student Company Rally and celebration of the 10<sup>th</sup> Anniversary of the youth entrepreneurship in Russia;
- Organization of JA Russia Best Overall Student Company participation in the International Trade Fair of young entrepreneurs;
- Monitoring and support of JA Leadership Project;
- Organization of the International Simple Words Essay Contest;
- Organization of JA Russia's representatives' participation in the JA Intl. Global Conference;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;

- Development and expansion of JA Russia's regional boards and regional centers network
- (continued);

#### **D. June - August 2004**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of JA Russia Best Overall Student Company participation in the International Company Competitions and JA Forums of young entrepreneurs;
- Monitoring and support of JA Leadership Project;
- Printing of JA Russia's Information materials;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development and expansion of JA Russia's regional boards and regional centers network
- (continued);

#### **Phase- 3 September 1, 2004 – August 31, 2005**

##### **A. September - November 2004**

- Preparation for upgrade of JA Russia's Central Internet Office and Regional Internet Network;
- Update, Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Preparation for the 6<sup>th</sup> JA Russia National Student Company Trade Fair;
- Preparation for the 3<sup>rd</sup> National "Simple Words" Essay Contest;
- Registration and start of JA Russia National MESE and Banks in Action contests;
- Registration of participants in JA international global curriculum components: MultiMESE, Travel & Tourism;
- Publication of supplemental materials related to JA computer, internet and web programs;
- Monitoring JA Leadership Project;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development of JA Russia's regional boards and regional centers network;

##### **B. December 2004 – February 2005**

- Upgrade of JA Russia's Central Internet Office and Regional Internet Network;
- Update, Expansion, Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia (continued);
- Preparation for National MESE and Banks in Action Finals;
- Preparation of the International Simple Words Essay Contest;

- Monitoring of JA Russia's teams participation in the HPGBC Global MESE Contest;
- Organization of the 6<sup>th</sup> JA Russia National Student Company Trade Fair;
- Organization of the 3<sup>rd</sup> National "Simple Words" Essay Contest;
- Organization and monitoring JA Leadership Project;
- Organization and monitoring JA Russia's Job Shadow Days project;
- Organization of JA Russia's representatives' participation in the JA seminars and conferences held by JA member nations;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development and expansion of JA Russia's regional boards and regional centers network
- (continued);
- Preparation of JA Russia's 1<sup>st</sup> National Business Hall of Fame;

### **C. March- May 2005**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of the National MESE and Banks in Action Finals;
- Monitoring of JA Russia's teams participation in the HPGBC Global MESE Contest;
- Organization of the 5<sup>th</sup> National Laws of Life Essay Contest;
- Organization of the 11<sup>th</sup> National Student Company Rally;
- Organization of JA Russia Best Overall Student Company participation in the International Trade Fair of young entrepreneurs;
- Monitoring and support of JA Leadership Project;
- Organization of the International Simple Words Essay Contest;
- Organization of JA Russia's representatives' participation in the JA Intl. Global Conference;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;
- Development and expansion of JA Russia's regional boards and regional centers network
- (continued);
- Organization of JA Russia's 1<sup>st</sup> National Business Hall of Fame;

### **D. June – August 2005**

- Monitoring and support of JA Russia Virtual library, Virtual fair and Virtual forum for teachers and students involved in JA activities across Russia;
- Organization of JA Russia Best Overall Student Company participation in the International Company Competitions and JA Forums of young entrepreneurs;
- Preparation of JA Leadership Project;
- Printing of JA Russia's Information materials;
- Monitoring the Technical support of JA Russia's Interregional Internet Network;

- Survey and Evaluation of implementation of development of JA Russia's regional centers and boards network and increasing the institutional capacity of JA Russia's regional centers;
- Final report submitted to USAID.

## ANNEX G



### Evaluation Scope of Work

Participant Team: Russia

<b>USAID Project to be Evaluated:</b> RUSSIA	<b>Initial and Final Funding Years:</b> November 1998 – August 2005
<b>Type Evaluation:</b> <input checked="" type="checkbox"/> Mid-Term (Formative) <input type="checkbox"/> Final (Summative) <input type="checkbox"/> Impact ( <i>Post-Facto</i> )	<b>Purpose and Intended Uses of the Evaluation:</b> To determine progress towards sustainability and inform decision regarding possible need for extension
<b>Brief Description of Project, the “Program Theory” that underlies it and it’s Intended Results:</b> Junior Achievement (JA) was started in Russia in December 1991. JA Russia program introduces the concepts of market economy, entrepreneurship, information technology, civic responsibility at an early age. Programs linked to solidify Russia’s democratic and economic transition as today’s students join the business world.	
<b>Existing Performance Information Sources:</b> November 2004 Evaluation by Development Associates, Inc. Monitoring Indicators (Missions PMP) Data from grantee	
<b>Evaluation Questions :</b> <ol style="list-style-type: none"> <li>1) As part of its sustainability strategy, has the JA Moscow office begun shifting toward a support mode, including management assistance, for regional offices within Russia?</li> <li>2) Has JA begun to developing long term budget/organizational development plan, including a Deputy Chief of Operations?</li> <li>3) How do JA participants’ (a) attitudes toward market economy and (b) skills in business differ from the same attitudes and skills of students who have not participated in JA?</li> <li>4) What are the differential effects in attitudes toward market economy among students in sequential/full participation in programs versus <i>non-sequential, unstructured</i>, participation in programs?</li> <li>5) Has it had a spillover effect in terms of attitudes toward civic activism, education, and community volunteerism?</li> </ol>	
<b>Evaluation Methods:</b> Review monitoring reports seeking trends and/or differences Interview JA Russia management Interviews with students, methodologists, teachers	
<b>Deliverables:</b> <ol style="list-style-type: none"> <li>1. <b>Evaluation Plan</b> covering (a) the overall design strategy for the evaluation, (b) the data collection and analysis plan for the evaluation, (c) a list of the team members, and which one will serve as the team leader and primary contact (an e-mail and phone contact for the team</li> </ol>	

- leader should be provided) and (d) the team's schedule for the evaluation. Due: 5/20/05
2. **Draft Evaluation Report**, consistent with guidance provided in Tab 14. Length of the report: Not to exceed 20 pages plus annexes and an Executive Summary of not more than 2 pages. Due: 7/21/05
  3. **Oral Presentation** of the evaluation. Be ready on the first day of Phase III, including handouts. 8/1/05
  4. **Final Evaluation Report**, incorporating advice you have been given by course instructors. Due: 8/12/05

**Evaluation Team Composition:**

Roy Grohs, Program Office USAID/Russia – Team Leader

- 20 year of USAID experience
- previous experience in evaluation
- prior experience as CTO of business/economic reform projects
- country experience

Maja Piscevic, Senior Legal Advisor USAID/Serbia

- 4 year of USAID experience
- understanding of business environment through the background in commercial law
- currently CTO of business/economic reform projects

Maria Stefurak, Media & Information Specialist, USAID/CAR

- prior experience in working with USAID democracy programs
- Russian language knowledge/country knowledge
- Familiar with Russian-type education system
- Graduate university training in evaluation

**Procedures and Logistics:**

*June 1-20, 2005 – Planning (email correspondence, developing questionnaires & interview questions, scheduling meetings)*

*June 20 -27,2005 – Field work*

- *Day1, meet with JA Moscow office*
- *Day 2 Site visits in Moscow area*
- *Day 3-4 Travel and site visits outside of Moscow*
- *Day 5 meet with the Director and other USAID and JA officials in Moscow*

*June 28- July 8, 2005 Consolidate data and begin drafting report sections*

*July 15, 2005 Draft report in*

*July 20, 2005 Final report in*

**Reports and dissemination:** *(Be aware that the evaluations you do will become the property of USAID and JA and any distribution beyond that will require USAID E&E Bureau's permission)*

**Budget:** *(For purposes of the course identify any expenses your team might incur beyond those associated with your own travel.)*

## Annex H

### Glossary

**Activity Manager** – Member of a USAID Strategic Objective (SO) Team or sub-team who is responsible for the day-to-day management of one of more specific activities. He or she is selected by the SO Team, and may also have the delegated authorities of a Cognizant Technical Officer, whose authority to carry out contract management functions are designated by a Contracting or Agreement Officer (ADS 200-203).

**Activity Monitoring Report (AMR)** - An activity monitoring document maintained by the USAID/Russia mission and updated each year. The document reports basic information about the activity, its purpose and progress toward objectives.

**Cognizant Technical Officer (CTO)** – The individual who performs functions that are designated by the Contracting or Agreement Officer, or are specifically designated by policy regulation as part of contract or assistance administration (ADS 200-203).

**Moscow Institute for Open Education** – An institute for continuing education for teachers in the Moscow city and Moscow Region.

**Output** - A tangible, immediate, and intended product or consequence of an activity within USAID's control (ADS 200-203).

**Performance Indicator** – A particular characteristic or dimension used to measure intended changes defined by a USAID Results Framework. Performance indicators are used to observe progress and to measure actual results compared to expected results (ADS 200-203).

**Program Description (PD)** – A USAID/Russia document that describes the background and purpose of an activity and contains justification for a request to fund an activity.

**Proxy indicator** - Data used to study a situation, phenomenon or condition for which no direct information - such as instrumental measurements - is available ([http://glossary.eea.eu.int/EEAGlossary/P/proxy\\_indicator](http://glossary.eea.eu.int/EEAGlossary/P/proxy_indicator))

**Strategic Objective (SO)** – The most ambitious result that a USAID Operating unit, along with its partners, can materially affect, and for which it is willing to be held accountable (ADS 200-203).

**Sustainability (or organizational sustainability)** - The ability of an organization to: 1) define a relevant mission; 2) follow sound management practices; and 3) develop diversified income sources (<http://www.policylink.nb.ca/wnew/filling/19.htm>)

## Annex I

### RECOMMENDATIONS

#### *Evaluation of the Programs of November 16, 2004 Junior Achievement Russia*

- USAID should encourage JAR to seek expert assistance in the area of organizational development, planning and board development and should be responsive to funding proposals that include these elements.
- Focus on the structural, procedural and governance mechanisms that need to be modified in order to address the challenge of growth.
- USAID should insist that JA Russia initiate a serious long term planning process. This process should address the nature of the relationship between the Moscow office and the regions and should examine alternative growth strategies.
- USAID should insist that JA Russia prepare a long term budget plan for the National Office and for the Regional Centers to demonstrate their further sustainability and how they will reduce dependence from USAID funding.
- USAID should be particularly responsive to funding proposals from JA Russia that will improve the ability of JA Russia to identify and cultivate private sector support.
- USAID should also be responsive to proposals that will provide management assistance to the Regional Centers in the areas of planning, fund raising and board development. While it would make sense to employ the experienced services of JA worldwide, the final choice should be made by JA Russia in collaboration with the Regional Centers.
- USAID should be responsive to proposals that increase the staff capacity of the Moscow Office to backstop the Regional Centers. In addition to these priorities, the Team recommends that USAID be responsive to funding proposals from JA Russia designed to:
  - Increase the level of studies and evaluations designed to measure impact on student attitude, performance and values.
  - Add a curriculum module on corporate responsibility, social capital and management opportunities and challenges in the non-profit social service sector.