

PN-ABP-601
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THE
HARVARD
INSTITUTE FOR
INTERNATIONAL
DEVELOPMENT

**OPES:
Setting Goals
and Policies**

Trainer's Manual



OPES: SETTING GOALS AND POLICIES

Trainer's Manual

Written By
Evangeline D. Harris Stefanakis
Katherine E. Cress

Edited By
Peter O'Neil

Graphics/Layout By
Gretchen M. Hummon

The Basic Research and Implementation in Developing Education Systems Project (BRIDGES) is directed by the Harvard Institute for International Development and the Harvard Graduate School of Education with the Office of Education, Bureau for Science and Technology, United States Agency for International Development.

July, 1992

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PREPARATION FOR TRAINER

- 1) Before the session, the trainer should carefully study the:
 - a) **Trainer's Manual** (including **Abridged User's Guide**)
 - b) **Complete OPES User's Guide**
- 2) The complete **OPES User's Guide** can serve as an information resource to answer participants' questions during the session. The trainer should direct participants to it.
- 3) Before the session, the trainer should practice the use of the OPES software, working through all the activities that will later be demonstrated to participants. It is suggested that the trainer practice the demonstration and activities and carry out a debriefing with a colleague before the session. This will help to prepare the trainer for his or her work with the large group.
- 4) The trainer should also be prepared to use sample goal/policies from his or her own country for the OPES demonstration. This may mean that the trainer will prepare by writing a script for demonstrating OPES as applied to his or her country. This would be done before the training session. The script could be recorded on notecards.

PREPARATION FOR TRAINER (cont.)

MATERIALS NEEDED

4 personal computers with OPES software installed

4 OPES User's Guides

4 Participant's Manuals

1 Trainer's Manual

Handbook Description of the BRIDGES Modules

Blackboard and chalk

Overhead Projector

Magnabyte Projector

OPES Overhead transparencies

Overhead pens and blank transparencies

Notecards for script

PART I: INTRODUCTION

Note to Trainer

The Trainer first introduces her/himself and then gives a brief introduction to the BRIDGES Project and the module. The Trainer then asks participants to introduce themselves.

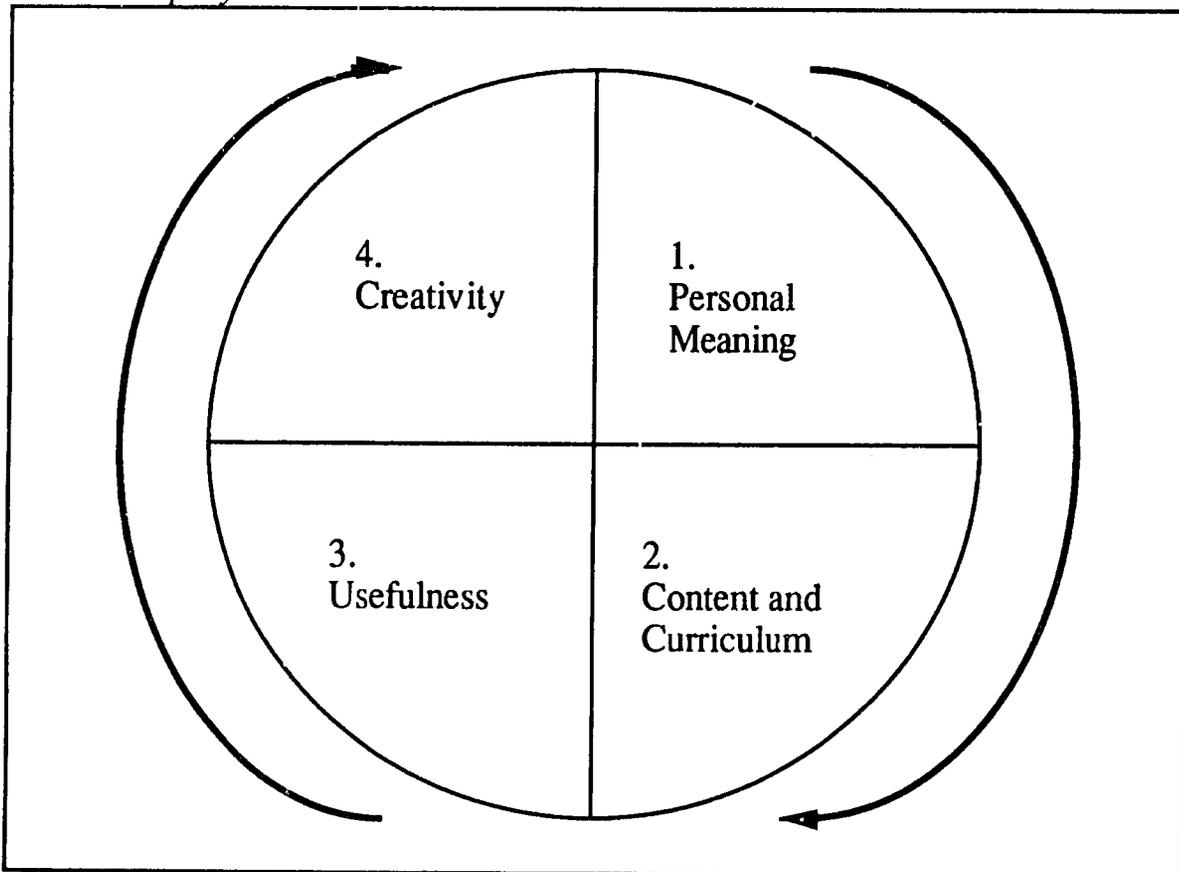
Text for Trainer

The approach of this module is **MULTI-FACETED**, and involves **ACTIVE LEARNING**.

That means that you will be involved in a session that will vary, moving from lecture, to writing, to discussion in both small and large groups. Your interests and experiences are as important as the information presented. I, as the trainer, will help facilitate discussions so that you can learn both from me and each other.

The learner-focused model that has been used in the development of the BRIDGES modules is a systematic cycle that is described in *Overhead 1*.

—> *Display Overhead 1*



INTRODUCTION (cont.)

Text for Trainer

Each step has a different emphasis for both participants and trainers, and the four quarters work in combination to form a complete learning cycle.

- 1.) The first quarter emphasizes how the material at hand relates to the participant's life.
- 2.) The second quarter addresses the content and curriculum, and the importance of an integrated approach to teaching.
- 3.) The third quarter of the cycle emphasizes the usefulness of the material both inside and outside of the classroom; in other words, it emphasizes the transferability of learning.
- 4.) The fourth and final quarter involves the use of creativity on the part of the participant to adapt what has been learned in unique ways.
(B. McCarthy, 1990)

OPES MODULE: OUTLINE

Text for Trainer

The following overhead shows the steps involved in the OPES module. It has four parts. Follow along with me as I explain each one.

Parts I and II explain what OPES is and demonstrate its applications in planning educational systems. The interactive portions are in III and IV. Please jot down questions you may have along the way and I will field them near the end of the demonstration.

—> *Display Overhead 2 and read aloud.*

OPES MODULE: OUTLINE	
PART I.	INTRODUCTION <ul style="list-style-type: none">• What is OPES?• How can it be used? Understanding OPES as a learning tool
PART II.	TRAINING ACTIVITIES <ul style="list-style-type: none">• Using OPES for informed policy development: a demonstration• Questions and Answers about OPES
PART III.	OPES: APPLIED TO A CASE STUDY <ul style="list-style-type: none">• OPES and its applications using a Case Study• Group work using worksheets on OPES
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WHAT IS OPES?

—> *Display Overhead 3 and read Text for Trainer aloud.*

OPES stands for
Optimizing Policies for Educational Systems.

OPES is a
Software Tool for matching **Goals and Policies.**

OPES has
Research embedded in the system.

OPES forces
Goals and Policies to fit **Resource Allocations.**

Text for Trainer

OPES stands for **Optimizing Policies for Educational Systems.**

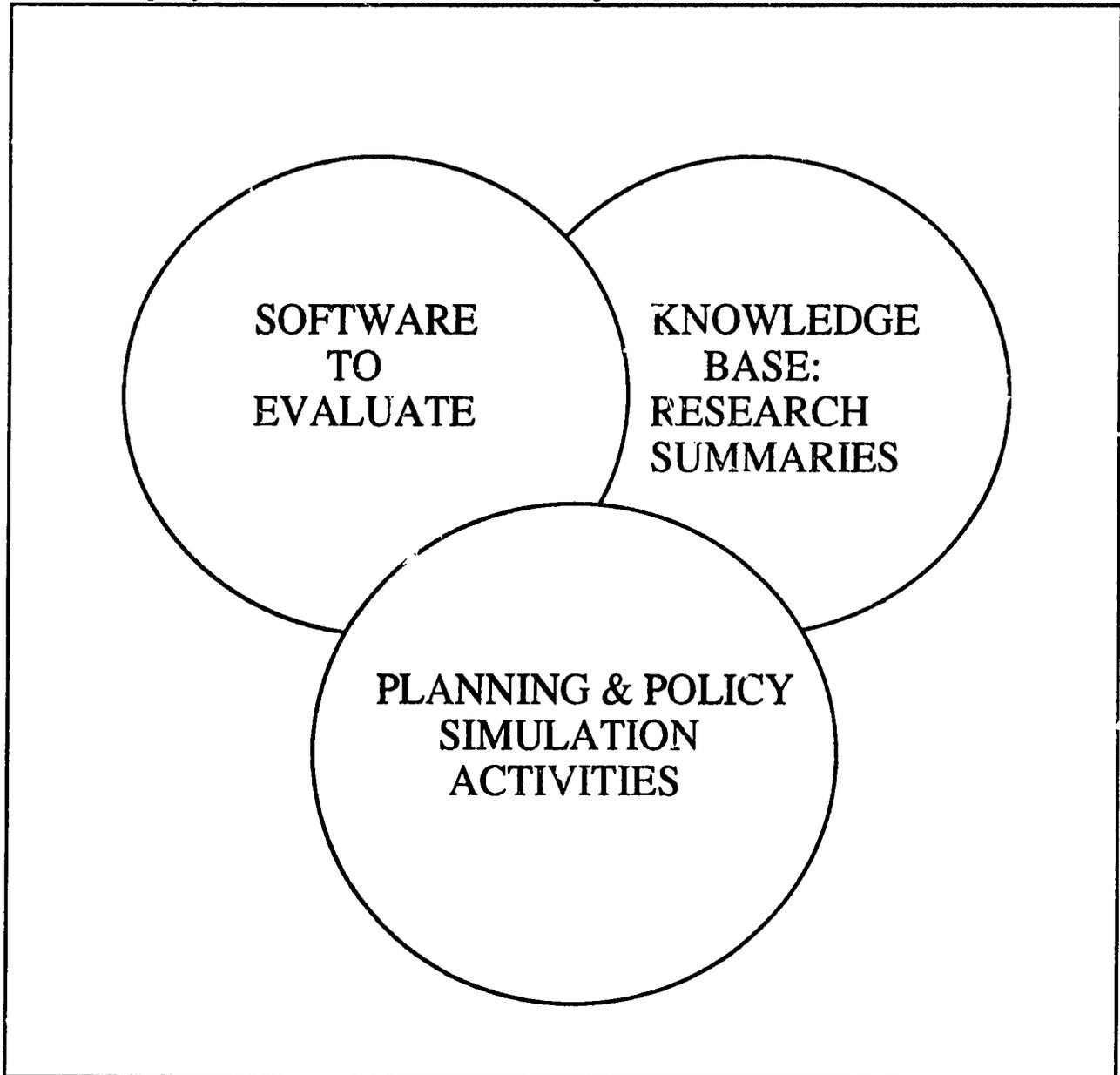
OPES, more simply, is an easy-to-use software tool that can demonstrate how potential educational policies relate to specific goals.

OPES has the advantage of providing the user with a knowledge base of research information that describes the effectiveness of policies on educational outputs.

OPES allows the user to find optimal resource allocations by examining the impact of policies on outcomes. That means that the user practices weighing the relative costs of policy implementation.

WHAT IS OPES? (cont.)

—> *Display Overhead 4 and read Text for Trainer aloud.*



WHAT IS OPES? (cont.)

Text for Trainer

Additionally the OPES system has an accompanying "knowledge base" of information on the relationships between policy interventions and educational goals.

Users can refer to the "knowledge base" to get concise research summaries and bibliographies based on literature reviews and on BRIDGES.

This "knowledge base" is designed to provide additional guidance in reaching optimal policy and resource allocation solutions.

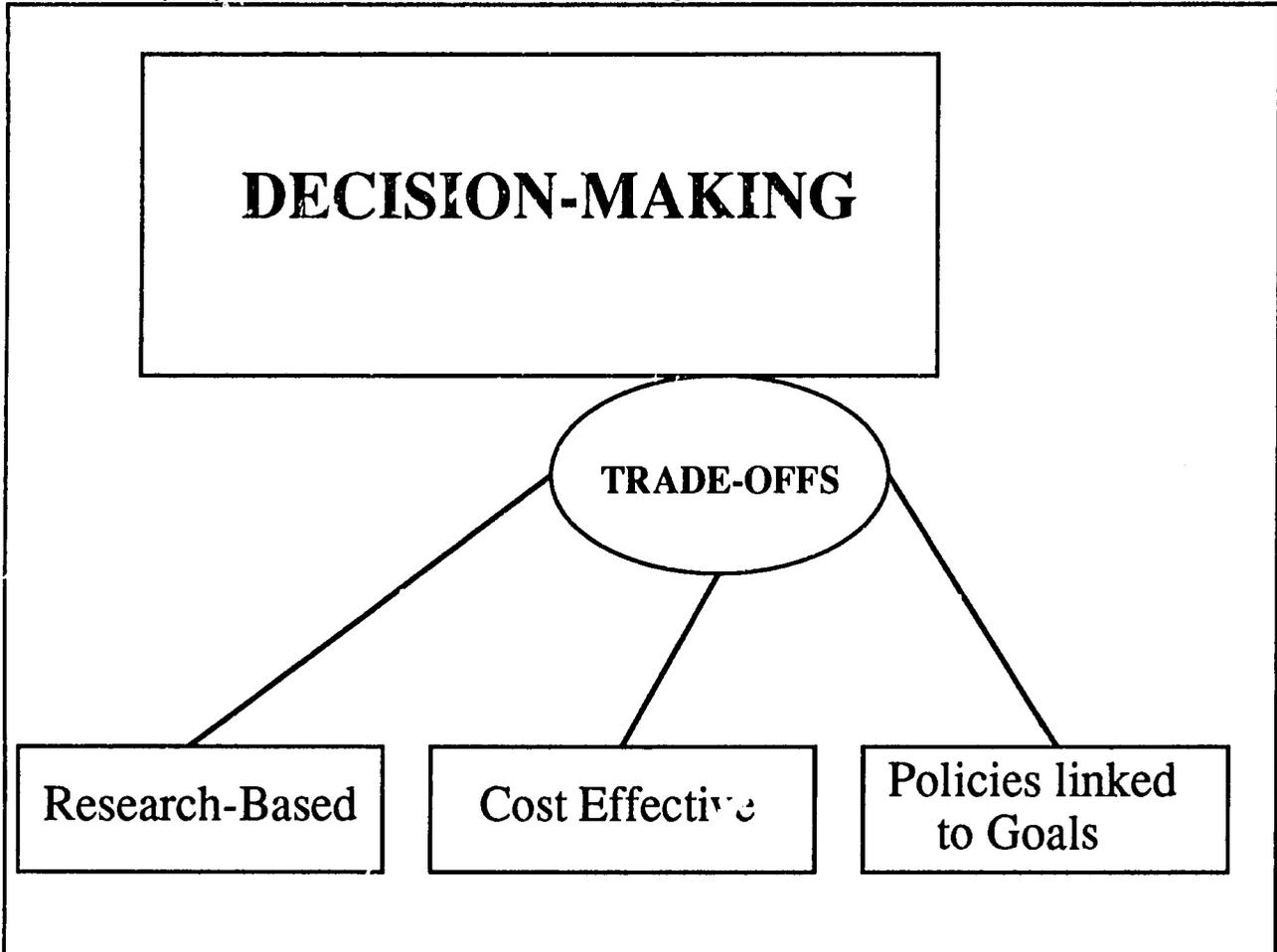
It can also be useful for researchers who may want to learn about the effectiveness of specific policies.

OPES therefore is a planning simulation activity with two steps:

1. The user can set goals and corresponding policies, then check these against research guidelines.
2. After outlining a goal-policy relationship, the user can assign budgetary amounts and balance these with priorities cited in goals and policies.

WHAT IS OPES? (cont.)

—> *Display Overhead 5 and read Text for Trainer aloud.*



WHAT IS OPES? (cont.)

Text for Trainer

In summary, OPES allows a planner or policymaker to make decisions by weighing the important concerns of what is:

- Educationally effective according to **research**
- Educationally effective according to **cost**
- Educationally effective because **policies are linked to goals** of the system

The ability to weigh such decisions carefully is critical to sound educational planning and policymaking. OPES offers a way to **experiment** with the many trade-offs involved in matching goals and policies with financial resources. Decisions made in OPES are not actual ones, yet the issues raised during the use of OPES can be safely examined. These complex issues can be better understood using a simulation like OPES before decisions are actually made at a national level.

OPES MODULE: OBJECTIVES

Text for Trainer

OPES is primarily designed as a training aid for decision makers concerned with education in developing countries. It is designed to help them assess policy choices and to establish budget priorities. This overhead helps us outline the objectives of the module. The objectives, clearly stated, are:

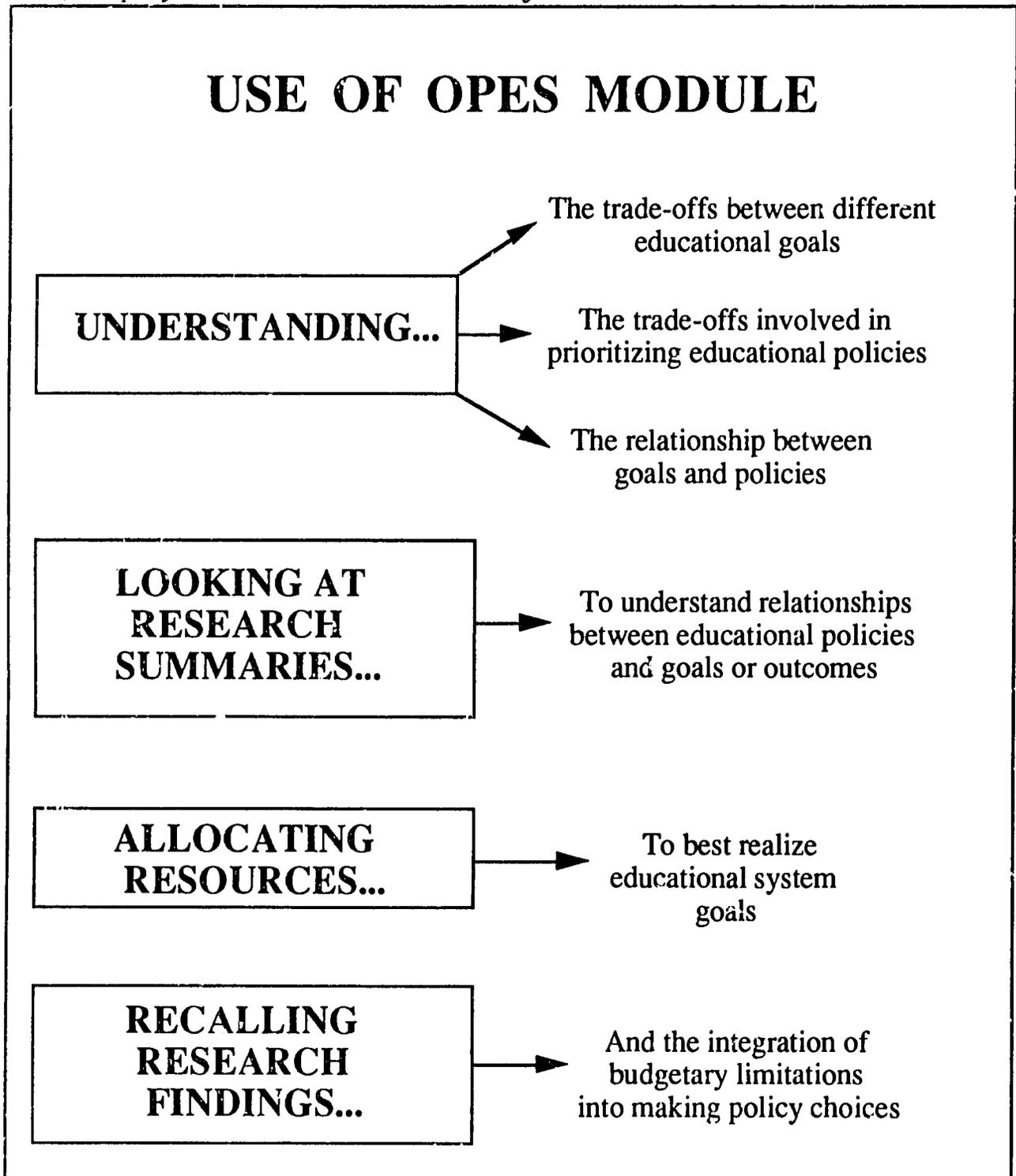
—> *Display Overhead 6 and read aloud.*

OPES MODULE: OBJECTIVES

- 1. To demonstrate the usefulness of the OPES model as a training tool.**
- 2. To allow participants to use OPES in a group setting.**
- 3. To explore the various policy alternatives for improving an educational system.**
- 4. To examine the various trade-offs that result from alternative policy interventions.**
- 5. To practice using OPES in a case study based on the participants' education system.**

USE OF OPES MODULE

---> *Display Overhead 7 and read Text for Trainer aloud.*



USE OF OPES MODULE (cont.)

Text for Trainer

Overhead 7 details the many powerful uses of the OPES module as a learning tool.

It focuses on:

- 1) Understanding Goal and Policy trade-offs,
- 2) Using research to link Goals to Policies,
- 3) Allocating resources to correspond to Goals and Policies and Research,
- 4) Consulting research to help with decision-making and budgetary limitations.

Under each topic we can see that integrating ideas of research, resources and goal setting requires considering what each area can bring to a decision making process.

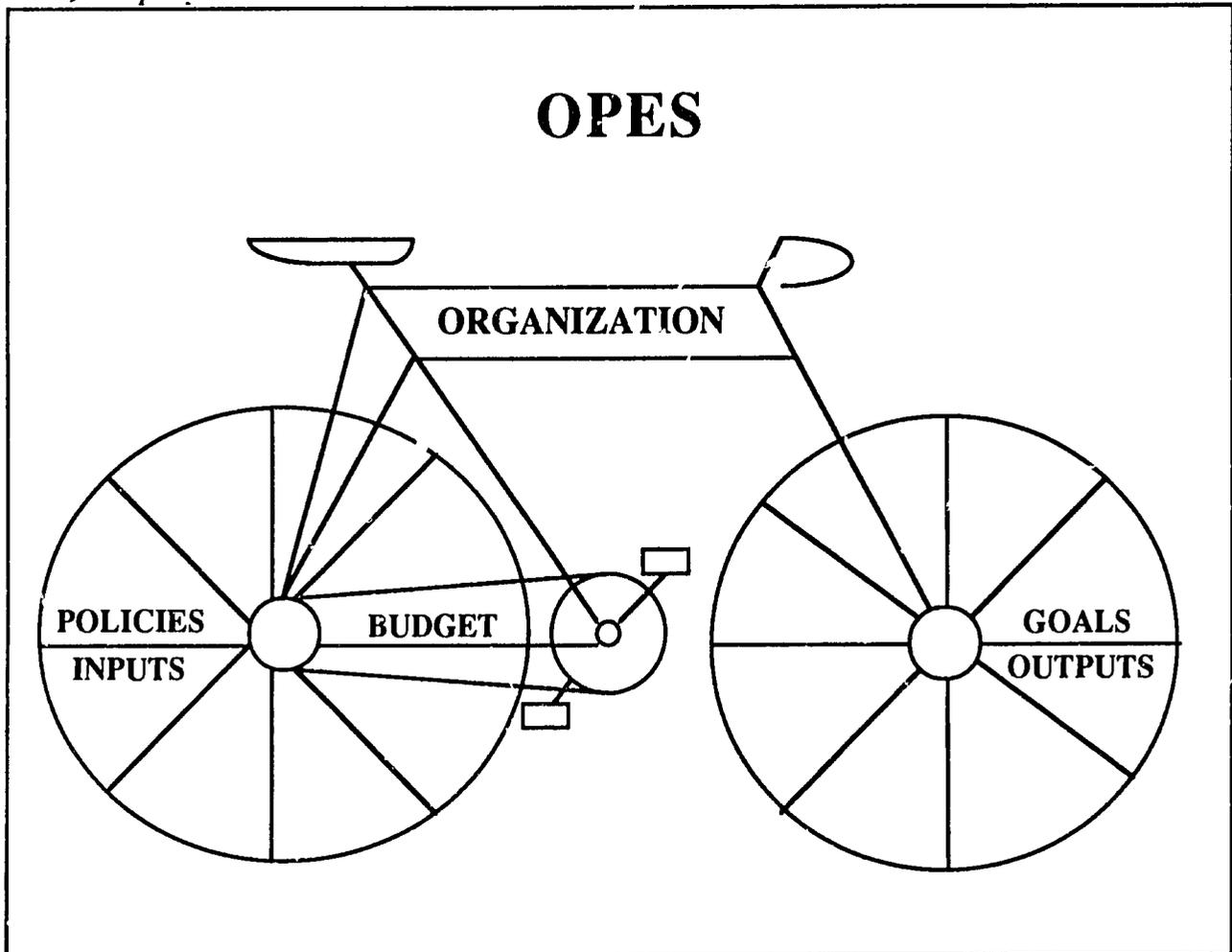
A FRAMEWORK FOR UNDERSTANDING OPES

Text for Trainer

I will now explain one model or metaphor for OPES, although the relationship of Goals to Policies can be thought of in other ways.

Imagine OPES as represented by a bicycle. The front wheel represents a system's educational goals. The back wheel represents the system's educational policies. The goals have to match the policies for the bicycle to stand up.

—>Display Overhead 8



A FRAMEWORK FOR UNDERSTANDING OPES

(cont.)

Text for Trainer

The frame of the bicycle, which holds the goals and policies together, is the educational organization. Budgetary constraints often dictate how goals and policies can move, as the chain of a bicycle controls its movement.

[Point to the overhead as you name the parts of the bicycle.] OPES relates educational inputs or policies and their associated costs to educational outputs or goals. The system provides you, the user, with guidance concerning the effectiveness of policy options. Based on the research reviews included in the system and on BRIDGES research results, you can obtain information on the latest knowledge pertaining to the relationships between policy intervention and educational system outcomes.

Discussion Questions:

Can someone from the group name an educational goal from their country? Please use this bicycle model to explain how it relates to the entire educational system.

PART II: TRAINING ACTIVITIES

USING OPES: A DEMONSTRATION

Note to Trainer

PREPARING FOR THE DEMONSTRATION

The trainer will demonstrate the use of OPES using a screen and magnabyte projector. During the demonstration, the trainer will run OPES using the example of a country he or she knows well. To do this, the trainer will choose Option 2, "Creating Your Own Data Set," at the beginning of the demonstration. (OPES also offers Option 1, which is an "EXPERT Solution" menu option. It is important to avoid the "EXPERT Solution" menu option for the demonstration and later group work as well. The "EXPERT Solution" gives the "answer" to the calculations in the software and should only be used after the module is completed.)

FIELDING QUESTIONS ABOUT OPES

Be prepared to answer questions throughout your demonstration. Also remember to refer to the complete OPES User's Guide if difficulties arise. Also remind participants to use the complete **OPES User's Guide** as a resource.

REVIEW OF THE OPES DEMONSTRATION

Be prepared to repeat steps of the demonstration that participants may not understand. When all steps have been completed, participants will be ready to move on to Activity 2.

USING OPES: A DEMONSTRATION (cont.)

Text for Trainer

To break up into groups for the demonstration, I'd like to ask those who are computer literate to raise their hands. Next, I would like the rest to join one of the computer literate participants with raised hands to form groups of four (4).

Each member of the group of four must take a separate task. *Overhead 9* outlines each role:

—> *Display Overhead 9 and read aloud.*

- 1.) **Operator:** The most computer literate member will operate the computer keyboard and follow along with the trainer's instructions.
- 2.) **Scribe:** Will be responsible for writing down the information provided on the Help Screens.
- 3.) **Facilitator:** Will lead discussion on the Goals and Policies.
- 4.) **Evaluator:** Working with other team members, will assign different "weights" to Goals and Policies.

USING OPES: A DEMONSTRATION (cont.)

Text for Trainer

While each group member has a specific assignment, the task of assigning "weights" to Goals and Policies is the responsibility of the entire group, with the group member in the role of the **Evaluator** responsible for charting the group's selections.

HELP SCREENS:

There is detailed information on each of the five goals included in the Participant's Manual. It is important that you read the Help Screens for complete information on the goals. A summary of this information is contained in the back of your Participant's Manual, beginning on Page 28.

Let's look at the goals together. What is the first one? [It is "Access & Equity."] What does the help screen tell us?

[The Trainer should wait for participants' response]

After following this process with goals, we look at policy options. Again a Help Screen allows us to look at research summaries and then assess the relative weights of policies. If you have any questions, please do not hesitate to ask them now.

OPES: A KEY IN THE ABRIDGED USER'S GUIDE

Text for Trainer

Now I would like you to read the **Abridged User's Guide**. Perhaps the **Evaluator** can read segments of it aloud to the other members.

{Allow time for participants to read the **Abridged User's Guide**.}

Please turn to Page 13 of your Participant's Manual. The OPES FRAMEWORK displayed in *Overhead 10* shows the steps that will be covered in this demonstration. This framework will also provide a useful reference for you when you work through OPES activities later in the session. The steps are:

—> *Display Overhead 10 and read aloud.*

ACTIVITY 1: OPES FRAMEWORK

Demonstration of OPES Using Abridged User's Guide

- Step 1 Select a Data File Set
- Step 2 Edit Weights of Goals of the
 Educational System (p. 15 of PM)
- Step 3 Edit Effectiveness of Policies (p. 16 of PM)
- Step 4 Edit Spreadsheet of Goals and Policies
- Step 5 Edit Budget Allocations (p. 20 of PM)
- Step 6 Edit Weights of Goals of the
 Education System
- Step 7 End Program

PART III: OPES: APPLIED TO A CASE STUDY

- ACTIVITY 2:**
- **OPES and its Applications Using a Case Study**
 - **Group Work Using Worksheets on OPES**

CHOOSING A COUNTRY

Text for Trainer

Activity 1 introduced us to the OPES program. Activity 2 will now help us use OPES to examine an actual country's goals and policies. Each group's **Facilitator** should help the group choose a country. At least two of the group members should be very familiar with the educational system of the country chosen.

[Allow time for group discussion. Ask every group which country they have chosen and note the country choices on a blackboard.]

ACTIVITY 2 (cont.)

- **OPES and its Applications Using a Case Study**
- **Group Work Using Worksheets on OPES**

COMPLETING WORKSHEETS

Text for Trainer

As you work through each step of the OPES software, fully complete the worksheets located in the Participant's Manual, beginning on Page 16. Each worksheet should be completed before your group can decide upon its goals, policies, and budget allocations. In order to record and recall the information on the different screens, these sheets are critical in helping each group process its information.

Each group should follow the same steps we used in the demonstration. Please continue working until all members are in agreement on the specified goals and policy options. Relate these to the country of your choice. If you have any questions, I will be available to answer them.

ACTIVITY 2 (cont.)

- **OPES and its Applications Using a Case Study**
- **Group Work Using Worksheets on OPES**

ROLES OF MEMBERS OF THE GROUP

Text for Trainer

The **Facilitators** will lead their groups through each step of the exercise of using OPES. The **Scribes** will be responsible for the completion of all the worksheets. The **Facilitators** will also serve as **Timekeepers**, making sure that group work stays on schedule according to the **Timekeeper Guide** as shown on *Overhead 11*. This guide is also on Page 14 of your Participant's Manual.

—> *Display Overhead 11 and read aloud.*

TIMEKEEPER GUIDE

SUGGESTED TIMES FOR HAVING PARTICIPANTS WORK WITH OPES SOFTWARE:

Learning OPES	10 MINUTES
Working on Goals	15 MINUTES
Working on Policies	20 MINUTES
Budget Allocations	15 MINUTES
Processing OPES	25 MINUTES

ACTIVITY 2 (cont.)

- OPES and its Applications Using a Case Study
- Group Work Using Worksheets on OPES

GROUP PRESENTATION

Text for Trainer

Each group should appoint a **Spokesperson**. In twenty minutes I hope to hear from each spokesperson regarding his or her group's work. The **Spokesperson Guide** on Page 15 of the Participant's Manual outlines what is expected. I will now pass out large sheets and markers for recording.

—> *Display Overhead 12 and read aloud.*

SPOKESPERSON GUIDE

A BRIEF DESCRIPTION AND EXPLANATION SHOULD BE GIVEN BY THE SPOKESPERSON EXPLAINING THE FOLLOWING:

- Weights of Goals of the Educational System
- Weights of Effectiveness of Educational Policies
- Spreadsheet of Goals and Policies
- Budget Allocations

RESULTS MAY BE PRESENTED ON A LARGE SHEET OR PRINTED OUT IN HARD COPY FOR PARTICIPANTS TO EVALUATE AND COMMENT ON.

Text for Trainer

Each group should follow the same steps we used in the demonstration. Please continue working until all members are in agreement on the specified goals and policy options. Relate these to the country of your choice. If you have any questions, I will be available to answer them.

PART IV: OPES: SOME CONCLUSIONS ON ITS APPLICATIONS

DEBRIEFING THE OPES ACTIVITIES

Note to Trainer

INDIVIDUAL DEBRIEFING

The trainer should allow the participants to individually answer the questions on the Debriefing Sheet. A fifteen-minute interval should be allowed for this individual work.

DEBRIEFING IN GROUPS

Next, the trainer should instruct participants to talk about their own answers with the person nearest to them. A ten-minute interval should be allowed for this work in pairs.

Text for Trainer

We have three sections to complete. First, I'd like to begin debriefing by asking each of you to take 15 minutes to fill out the Debriefing Sheet included on Page 24 of the Participant's Manual.

When you are finished, please begin talking to the person next to you to compare notes.

DEBRIEFING THE OPES ACTIVITIES (cont.)

QUESTIONS FOR THE DEBRIEFING SESSION

1. What do you find most useful about OPES?

2. How did you prioritize goals?

3. What role did the research summaries (Help Screens) play?

How did your group use the research summaries on the help screens?

4. What information from the research (Help Screens) was most useful or informative?

For establishing Goals:

For establishing Policies:

5. How did your group establish subsequent policies?

6. How could you see your ministry or educational center using OPES?

7. How could you see OPES being adapted or extended?

DEBRIEFING THE OPES ACTIVITIES (cont.)

Note to Trainer

LARGE GROUP WRAP-UP

As a final way of wrapping up all the OPES activities, the trainer should ask for comments from the group as a whole. These comments can come from the Debriefing Sheet or any of the activities. The trainer will answer any questions the group may have about the use of OPES. The group as a whole may wish to discuss, in broad terms, the potential usefulness of OPES for educational policymakers in their country.

Text for Trainer

We have worked through the OPES software as a decision making tool. I am now interested in your reactions as participants. How could this tool be useful to policymakers?

Note to Trainer

Record group ideas on a blank overhead. Ask five participants to comment. At the end, choose two comments to read as a summary.

Thank the participants for attending and ask them to fill out the Module Evaluation sheet found at the end of their Participant's Manuals before leaving.

MODULE EVALUATION

Please take a few minutes to complete this simple evaluation at the end of the module presentation. Responses will remain anonymous and you may hand in your completed assessment to any member of the HIID team.

MODULE NAME:

Name (OPTIONAL): _____

Institutional Affiliation: _____

Address: _____

City/Town: _____

PLEASE RATE THE MODULE ON A SCALE OF 1 (lowest) TO 5 (highest)

	1	2	3	4	5
CONTENT	1	2	3	4	5
STYLE OF PRESENTATION (LAYOUT/DESIGN)	1	2	3	4	5
CLARITY OF CONTENT PRESENTED	1	2	3	4	5
RELEVANCE TO TEACHERS AND SCHOOL ADMINISTRATORS	1	2	3	4	5
RELEVANT TO POLICYMAKERS AND PLANNERS	1	2	3	4	5
USEFULNESS TO YOUR PROFESSIONAL NEEDS	1	2	3	4	5
OVERALL (GENERAL EVALUATION OF THE MODULE)	1	2	3	4	5

Use the space below to write a short paragraph suggesting how best to improve the format and presentation of the current module.

Please comment on the strengths of the module that you noted during the presentation.

PART V: GLOSSARY

Access

Access means children have both the opportunity to attend school and the means to participate in school. Opportunity refers to the supply of educational resources such as schools, instructional materials and teachers. Participation refers to the demand for educational opportunities when they are available.

Administration (School System)

Those individuals charged with the performance of executive duties for the school system on a nationwide basis.

Administration (School Building)

Those individuals assigned to the leadership position within a single school building. The job description generally relates to the execution of curriculum, personnel and public affairs objectives as distinguished from policymaking assignments.

BRIDGES

Basic Research in Developing Educational Systems, a project sponsored by Harvard Institute for International Development.

Budget

A statement of the financial position of an administration for a definite period of time based on estimates of expenditures during the period and proposals for financing.

Curriculum

The unified set of courses offered by an educational institution or one of its branches.

Equity

Equity means that there exist no differences in levels of enrollment and/or achievement between children as a function of gender, social class, race, location of residence (urban vs. rural), language or other factors.

GLOSSARY (cont.)

Evaluation Process

The method by which any aspect of an educational system is assessed as to its relative value.

Evaluators (External)

Implies using judges from outside the given school system to make the appraisal.

Evaluators (Internal)

Implies using assessors from within the given school system to make a judgement.

Goals

Those educational aims and objectives that a school system creates for itself both on a building and system level.

Implementation

The actual putting into practice of a projected school reform.

Implementors

Those groups or individuals within a school system charged with the responsibility or obligation of guiding a reform into movement.

Internal Efficiency

The measure of processes within an educational system that can be improved so that all effort and resources result in an acceptable finished product.

Management (School)

The act of directing a school through leadership and organization.

Output

The outcome that is produced in a school reform attempt through collective effort.

Participation

The act of involvement or sharing in the common goals of a school system.

GLOSSARY (cont.)

Processes

The means by which educational goals are analyzed and attained in a school system

Quality

The degree of excellence in schools that is determined by the level of student achievement.

Reform (School)

An attempt to make changes within a school system that will have a positive impact in creating an improved learning, working, or fiscal environment.

Results

The consequences, outcomes, or conclusions that are evident in the evaluation of a school reform.

School System

The umbrella organization that holds the responsibility and policymaking obligation for all schools within its control.

Simulation

The imitative representation of an aspect of an educational system by setting up a theoretical situation.

PART VI: APPENDIX

SUMMARY OF HELP SCREENS

GOAL 1: ACCESS & EQUITY

Access:

Almost all countries of the world have established universal primary education as a basic right of all citizens. In most cases, the obligation of the state is understood in terms of provision of the means for children within an established age range to attend school. In this case, access is measured in terms of the proportion of children who ever attend school. It may also be measured in terms of the proportion of children who, on reaching school age, actually enroll. This is known as the Entrance Rate. These data are generally collected by survey or census means, and are not common.

Another definition of access compares total enrollment in school to the number of children in the official age cohort. This is known as Gross Enrollment Rate. If children enter late, that is, one or more years after the minimum entrance age, and if there is considerable repetition of grades, it is possible for the Gross Enrollment Rate to exceed 1.0. That is, it is possible for there to be more children enrolled in school than in the age cohort, because of students older than the cohort.

The Net Enrollment Rate compares enrollment of students whose age is within the official age range with the number of children in the age range. The Gross Enrollment Rate is more common because few education systems collect age data on their students.

All three rates can vary by gender, social class, urban vs. rural residence, ethnic origin and other factors, and can therefore be used to estimate the Equity of the system. Access is affected by the number of schools that are built, and the size of each of these schools.

Improvements in access eventually lead to improvements in External Efficiency, as the average level of education in the population increases.

SUMMARY OF HELP SCREENS (cont.)

GOAL 1 (cont.)

Equity:

Because education has such an impact on the life chances of individuals, there is considerable concern about the equity of the education system. The most common focus is on the equality of opportunity that the state provides.

Systems that have not yet achieved universal access define equality of opportunity in terms of levels of participation. Statistics that show very different enrollment rates for boys as compared to girls, or working class as compared to middle class youth, are taken as evidence of lack of equality of opportunity, and therefore a problem of equity.

Systems that have all their children in school tend to assess equality of opportunity not in terms of enrollment but in terms of achievement. Sharp differences in levels of achievement are taken as evidence of inequalities in the way the system treats students. The "equity and equality of opportunity" approach states there should be no differences in the level of achievement between children as a function of gender, social class, race, location of residence (urban vs. rural), or language.

Another approach to equity focuses not on the equality of opportunity or treatment provided by the system, but instead on the outcomes produced. There are two perspectives within this approach. The first assumes that all children are equally able, and therefore all differences in individual performance reflect differences in opportunity or treatment. The second assumes that, while differences in ability may exist, the school should contribute to the reduction in society of inequalities in life outcomes.

SUMMARY OF HELP SCREENS (cont.)

GOAL 2: INTERNAL EFFICIENCY

If the purpose of the education system is defined as the production of educated persons, then it makes sense to talk of the efficiency of the process of production. Efficiency is understood in terms of the relationship between the amount of product and the amount of effort necessary to generate that product. One system is more efficient than another when it produces more educated persons with the same effort as the other system, or when it produces the same number of educated persons with less effort than the other system.

We talk of internal efficiency to refer to those processes within the education system that can be improved. External efficiency refers to the relationship between the products of the education system and other parts of society. The most common definitions of internal efficiency of education systems are in terms of flows of students. In a perfectly efficient system, there is no waste. All effort, all resources result in an acceptable finished product.

In a perfectly efficient education system, no students ever fail and all students complete the cycle within the specified time period. An inefficient system is one in which many students fail and/or drop out.

A useful index for the system is the number of years of instruction required to produce the average graduate. Some definitions of "efficiency" ignore the quality of the product that is generated. It could be, for example, that children coming out of the more "efficient" system know less than those coming out of the less efficient system.

SUMMARY OF HELP SCREENS (cont.)

GOAL 3: QUALITY

Achievement:

The term achievement is used here to refer to learning by students of the knowledge and skills that the state has set as objectives. The term "achievement" excludes moral and physical education, and development of attitudes toward self.

Education systems that emphasize achievement are recognized by the emphasis put on academic learning. Curricular objectives are clearly defined and all students are expected to strive toward them. Generally, the program is fixed, that is, all courses are required. Assessment of learning is a constant process in systems concerned with achievement. Teachers each day assess the extent to which students have understood and assimilated the material presented.

Many systems have some form of end-of-year examination to ensure that students have the requisite knowledge, skills and attitudes to handle the material of the next highest grade. Success on these examinations is essential to further progress in the system.

Typically, achievement tests are standardized measures of school knowledge that are administered on a national or regional level to promote comparison of the performance of districts and schools. These tests only measure knowledge of the major subjects -- that is, national language, social studies, mathematics, religion -- as they are taught in school. They are not adequate devices for the assessment of changes in values or behavior.

SUMMARY OF HELP SCREENS (cont.)

GOAL 4: VALUES EDUCATION

In addition to teaching of cognitive knowledge and skills that are important for adult life (See Quality), schools are assigned the task of forming young children as responsible members of society. This process of socialization includes inculcation of a national identity, acceptance of the legal authority of the state, training in the processes considered essential for the maintenance of the civil society, and the internalization of a set of moral and ethical standards considered to be the core values of the society.

In many education systems, values education is a specific part of the curriculum, with formal learning objectives, an allocation of time in the instructional calendar, specific instructional materials, and special training for teachers. Some systems regularly assess students with respect to their moral development. These assessments are in many cases examinations on knowledge of subject matter.

SUMMARY OF HELP SCREENS (cont.)

GOAL 5: EXTERNAL EFFICIENCY

An education system may be effective in terms of achievement or moral development or personality development of students, and yet fail to meet the requirements of other sectors of society. For example, graduates of the education system may be well-trained in areas not needed in the national economy, or in areas for which there are few employment opportunities. The knowledge that students have acquired may be irrelevant for resolving the kinds of problems that the society faces. The system may be highly internally efficient in the production of secondary school graduates when what are needed -- for example, for economic growth -- are persons trained at the higher education level. In this case we would say that the external efficiency of the education system is low. In other words, there is low product for the effort expended.

The external efficiency of an education system is generally assessed in terms of the success of its graduates in the larger society. The most common measures of success are with respect to the economy, for example, the time graduates require to find a job, employment within the field for which prepared, average income of graduates as compared to non-graduates.

There are two positions with respect to the most effective way for an education system to insure high external efficiency with respect to the economy:

- Provide all students with a broad, general academic education, and provide specialized training immediately before students enter the labor force. This system emphasizes academic achievement as the way to maximize external efficiency.
- Begin tracking or streaming students as early as possible and provide specialized training according to their abilities and the demands of the economy. This approach produces a highly differentiated system.

Request Format Sheet

Your Name: _____ Title: _____

Institutional Affiliation: _____

Address: _____ City/Town: _____

Please circle those modules that you are interested in for your country/organization.

Part 1: Issues in Education: Tools for Planning

- Module 1: The HIID Training Modules: An Introduction
- Module 2: EPICS: Investing in Basic Education for Development
- Module 3: OPES: Setting Goals and Policies
- Module 4: Understanding Access, Equity and Gender in Education

Part 2: Research Informs Policymakers

- Module 5: Issues in Teaching: Training and Implementation
- Module 6: Internal Efficiency
- Module 7: School Quality and Learning Outcomes
- Module 8: The Well-Managed School System

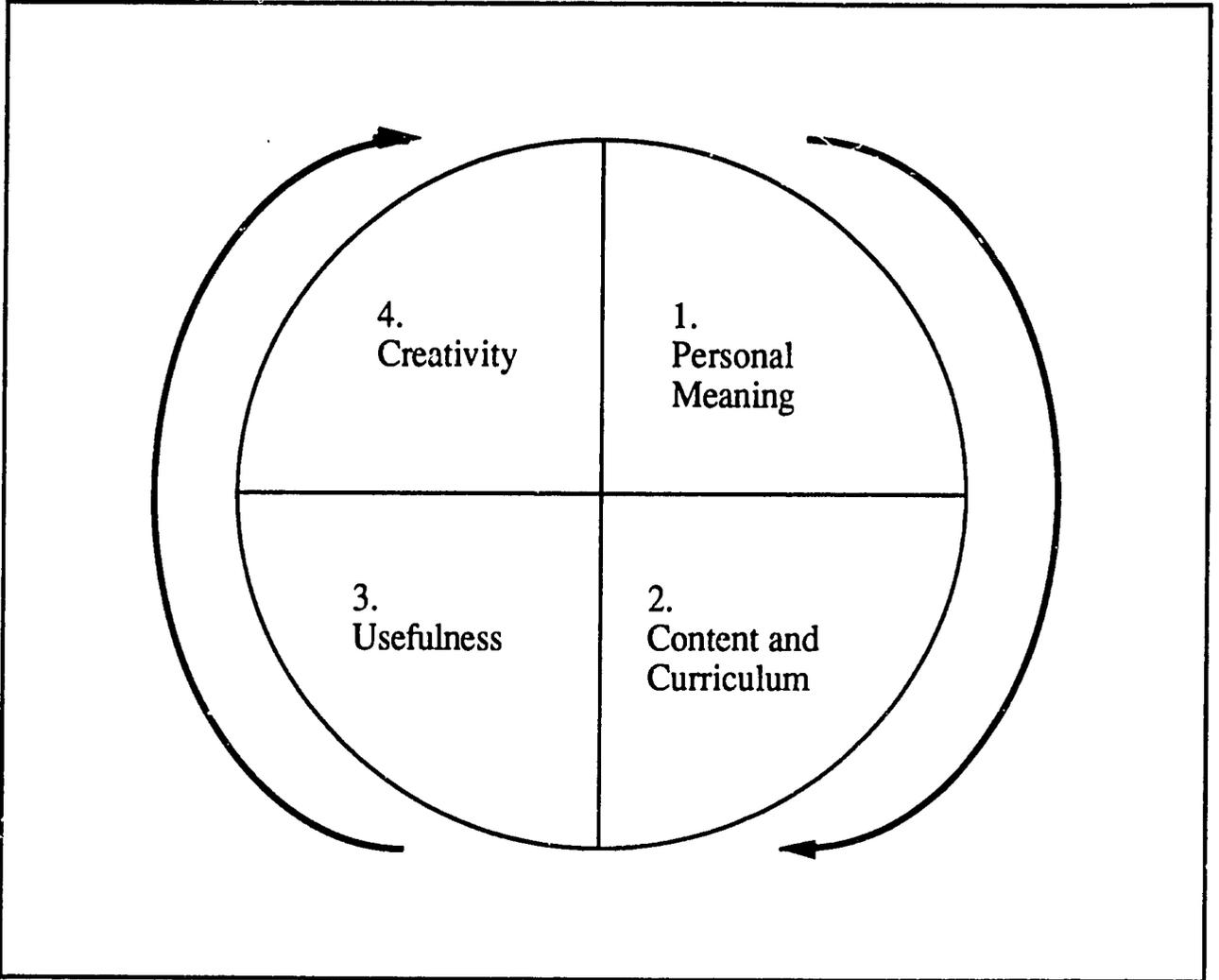
* * * *

Please indicate whether or not you would be interested in a consultation regarding the training programs with members of the HIID staff.

Yes

No

--> *Overhead 1*



OPES MODULE: OUTLINE

PART I. INTRODUCTION

- What is OPES?
- How can it be used? Understanding OPES as a learning tool

PART II. TRAINING ACTIVITIES

- Using OPES for informed policy development: a demonstration
- Questions and Answers about OPES

PART III. OPES: APPLIED TO A CASE STUDY

- OPES and its applications using a Case Study
- Group work using worksheets on OPES

PART IV. OPES: SOME CONCLUSIONS ON ITS APPLICATIONS

- Debriefing the OPES activities

PART V. GLOSSARY

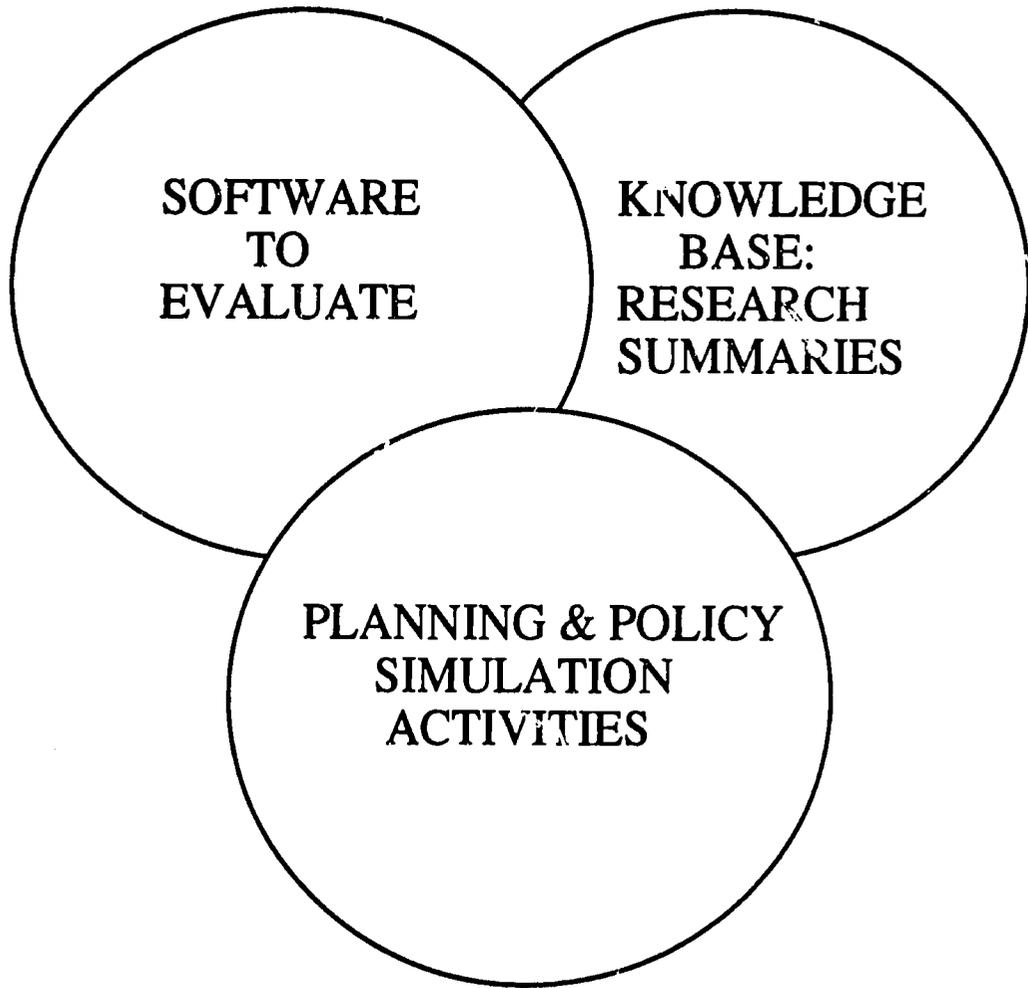
PART VI. APPENDIX

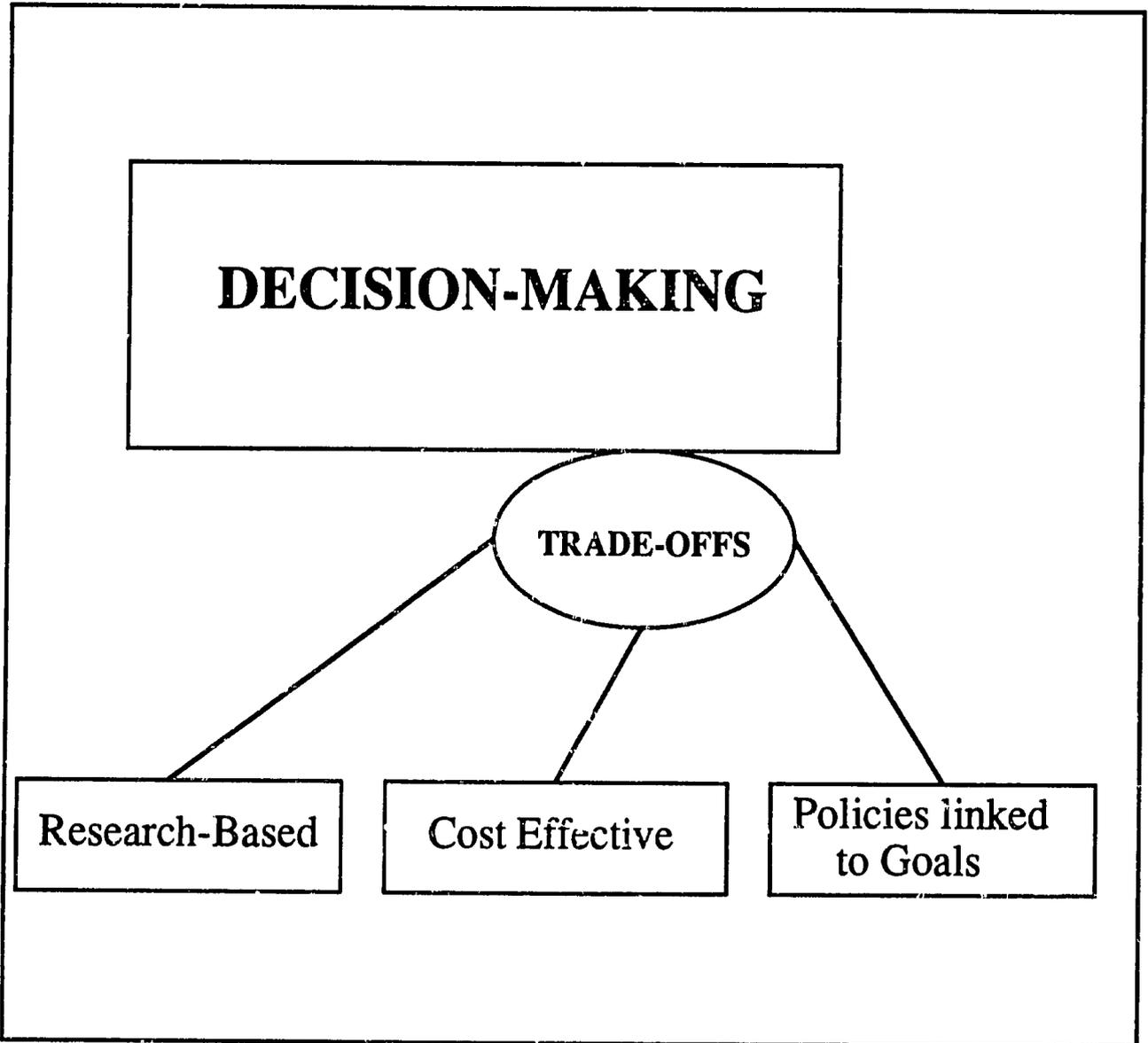
OPES stands for
**Optimizing Policies for
Educational Systems.**

OPES is a **Software Tool** for
matching **Goals and Policies.**

OPES has **Research**
embedded in the system.

OPES forces
Goals and Policies to
fit **Resource Allocations.**

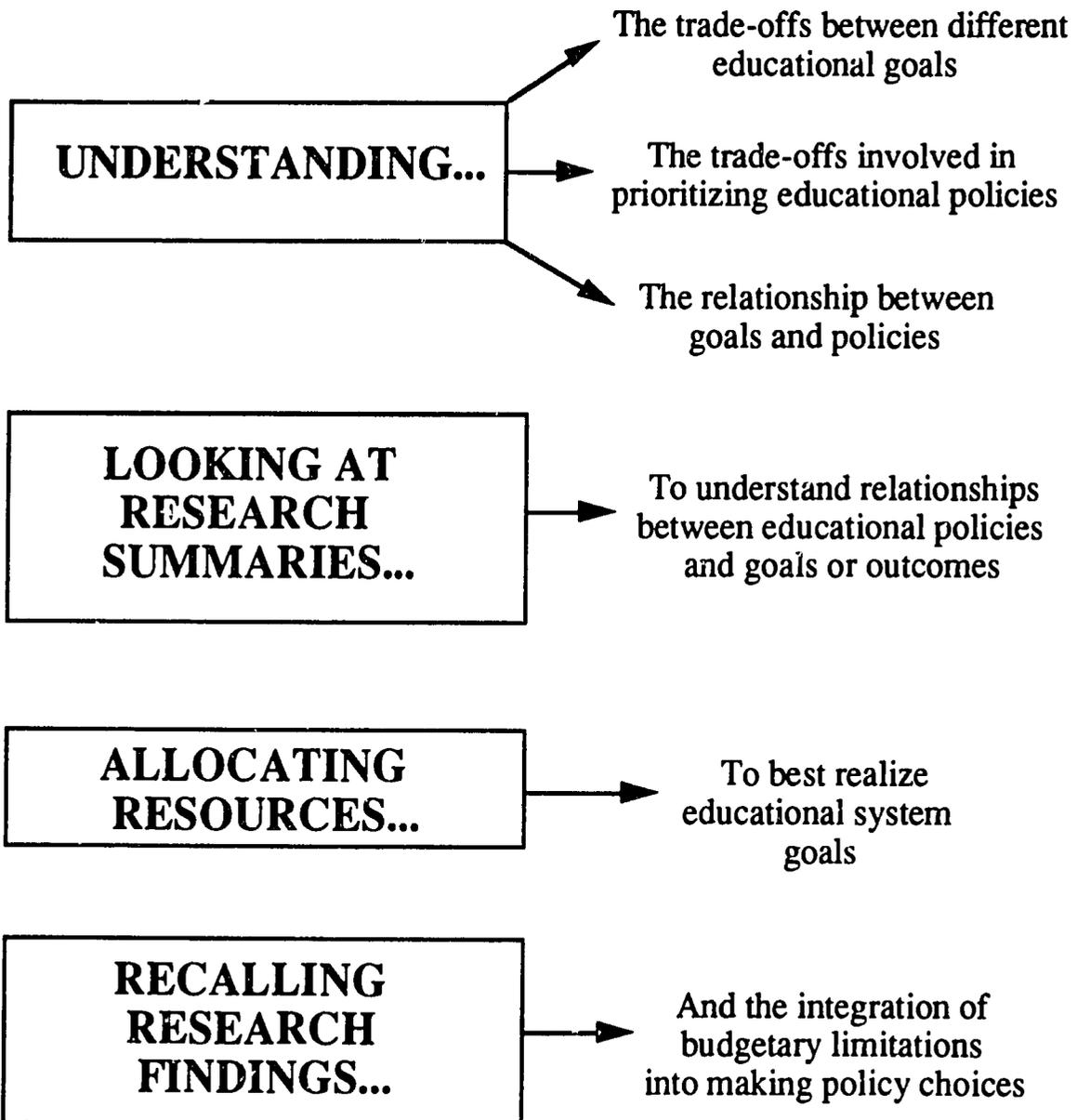




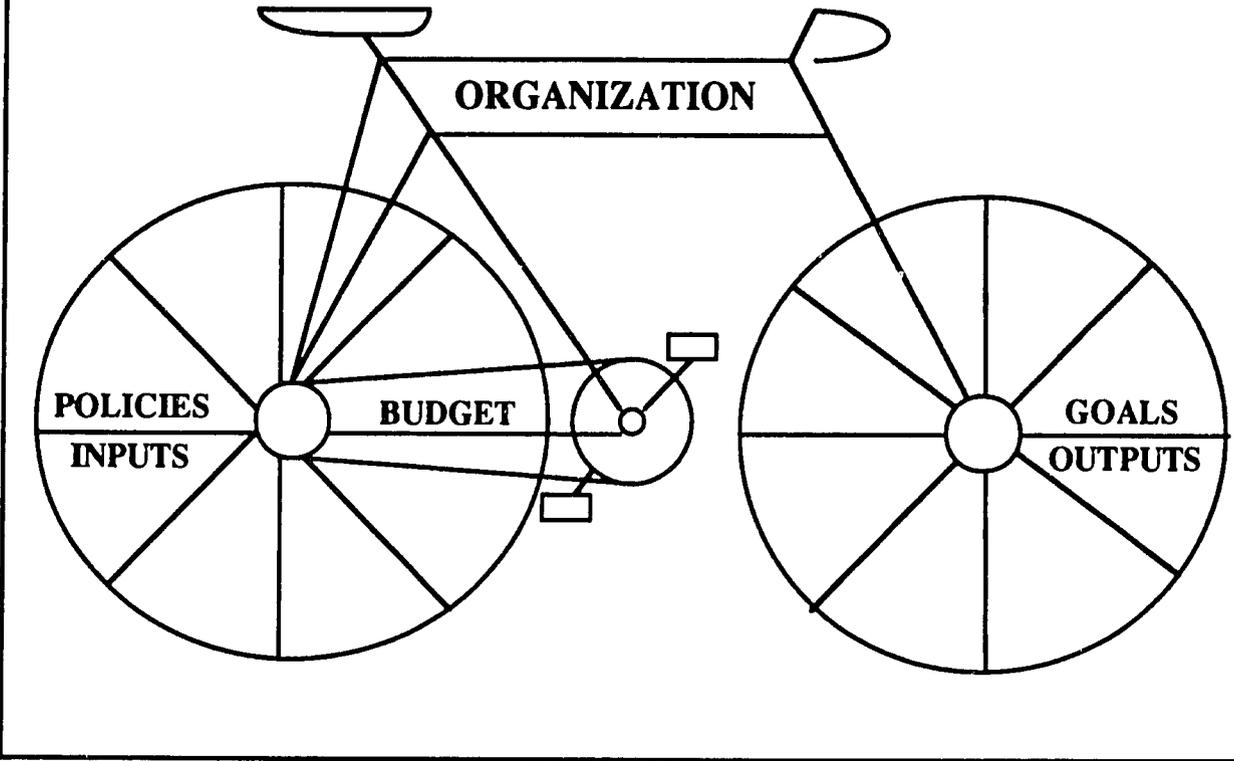
OPES MODULE: OBJECTIVES

- 1. To demonstrate the usefulness of the OPES model as a training tool.**
- 2. To allow participants to use OPES in a group setting.**
- 3. To explore the various policy alternatives for improving an educational system.**
- 4. To examine the various trade-offs that result from alternative policy interventions.**
- 5. To practice using OPES in a case study based on the participants' education system.**

USE OF OPES MODULE



OPES



—>Overhead 9

- 1.) **Operator:** The most computer literate member will operate the computer keyboard and follow along with the trainer's instructions.
- 2.) **Scribe:** Will be responsible for writing down the information provided on the Help Screens.
- 3.) **Facilitator:** Will lead discussion on the Goals and Policies.
- 4.) **Evaluator:** Working with other team members, will assign different "weights" to Goals and Policies.

ACTIVITY 1: OPES FRAMEWORK

Demonstration of OPES Using Abridged User's Guide

- Step 1 Select a Data File Set
- Step 2 Edit Weights of Goals of the
 Educational System (p. 16 of PM)
- Step 3 Edit Effectiveness of Policies (p. 17 of PM)
- Step 4 Edit Spreadsheet of Goals and Policies
- Step 5 Edit Budget Allocations (p. 21 of PM)
- Step 6 Edit Weights of Goals of the
 Education System
- Step 7 End Program

TIMEKEEPER GUIDE

SUGGESTED TIMES FOR HAVING PARTICIPANTS WORK WITH OPES SOFTWARE:

Learning OPES 10 MINUTES

Working on Goals 15 MINUTES

Working on Policies 20 MINUTES

Budget Allocations 15 MINUTES

Processing OPES 25 MINUTES

SPOKESPERSON GUIDE

A BRIEF DESCRIPTION AND EXPLANATION SHOULD BE GIVEN BY THE SPOKESPERSON EXPLAINING THE FOLLOWING:

- Weights of Goals of the Educational System
- Weights of Effectiveness of Educational Policies
- Spreadsheet of Goals and Policies
- Budget Allocations

RESULTS MAY BE PRESENTED ON A LARGE SHEET OR PRINTED OUT IN HARD COPY FOR PARTICIPANTS TO EVALUATE AND COMMENT ON.