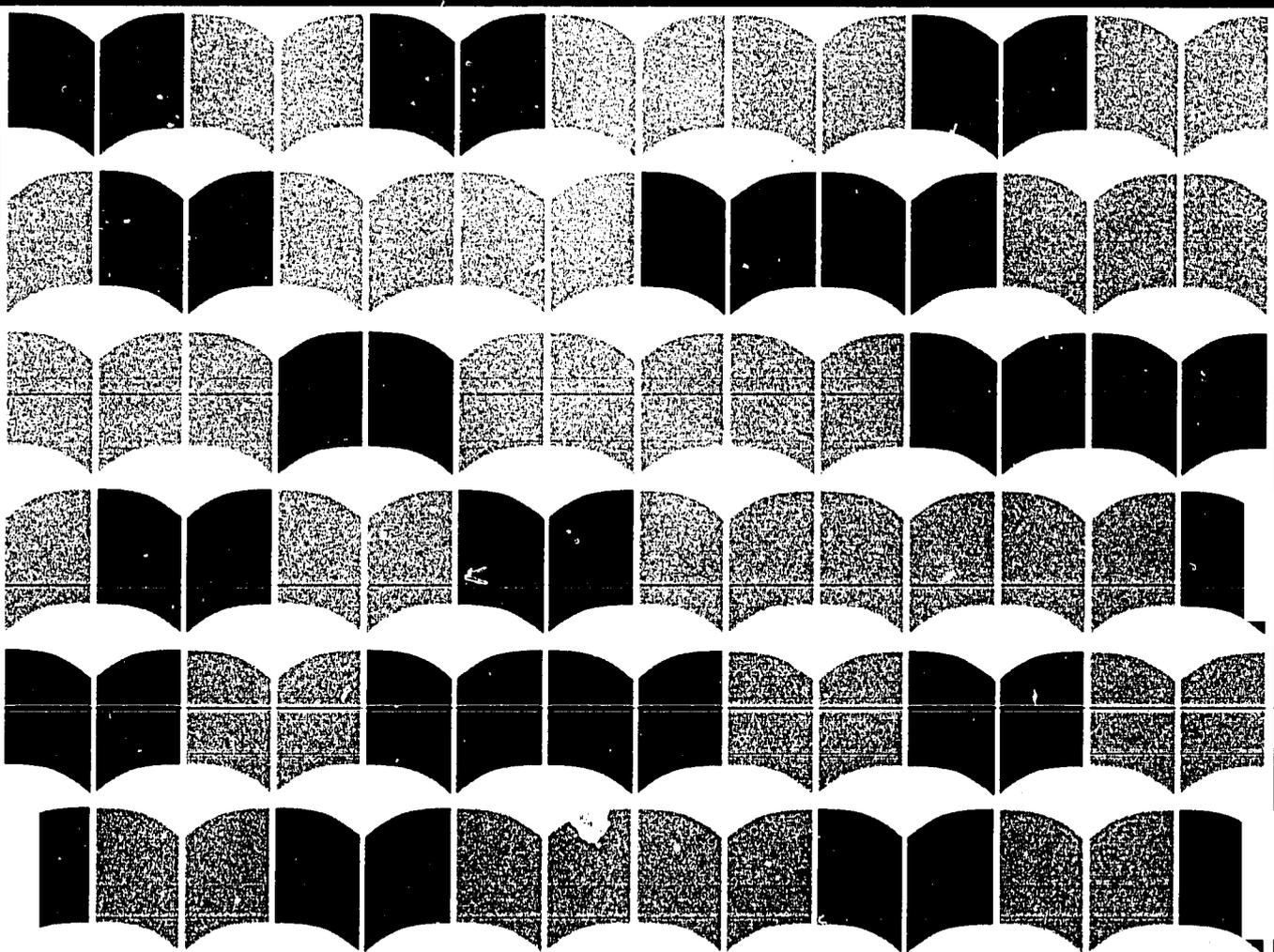


REPORT

EDUCATIONAL POLICIES WORKSHOPS

MARCH 21 - 24, 1993

KINGSTON, JAMAICA



WORKSHOP REPORT

EDUCATIONAL POLICIES WORKSHOP

SPONSORED BY

THE ADVANCING BASIC EDUCATION AND LITERACY (ABEL) PROJECT

CO-HOSTED BY

THE MINISTRY OF EDUCATION - JAMAICA

THE U.S. AGENCY FOR INTERNATIONAL DEVELOPMENT - JAMAICA

MARCH 21-24, 1993

KINGSTON, JAMAICA

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WORKSHOP REPORT

I. THE ABEL CONFERENCE IN JAMAICA

Project ABEL, a USAID basic education initiative, was designed to provide technical assistance to developing nations to facilitate education reform strategies. The Academy for Educational Development (AED) serves as the prime contractor for the five-year ABEL project.

The ABEL project sponsored an 'Educational Policies Workshop' in Jamaica from March 21-24, 1993. The conference was attended by delegations from 13 territories in the English-speaking Caribbean.¹ Nine delegations were headed by the Permanent Secretary of the Ministry of Education. Representatives of USAID/Jamaica, USAID/Barbados, USAID/Washington, AED, Research Triangle Institute, Harvard Institute for International Development, The University of the West Indies, Florida State University and The British Development Division/Barbados also attended. A list of participants is presented in Annex A.

The objective of the workshop was to involve members of Ministries of Education of English-speaking Caribbean countries in exploring recent concepts, tools and experiences for successfully improving educational policy development and advocacy. The workshop involved the participants in the use of computerized simulations, small group discussions, presentations and informal discussion/exploration.

Issues explored included:

- o Introduction to the Project BRIDGES Training Modules and Share, a bibliographic data base for personal computers;**
- o Equity and curricular relevance and their impact on learning outcomes, especially employment and repetition rates;**
- o Effective teaching and the design of teacher training programs;**
- o Decentralization and the "Well-Managed School System," a BRIDGES Training Module;**

¹Territories represented and number of delegates were Jamaica (8), Antigua and Barbuda (2), St. Kitts and Nevis (2), Montserrat (2), Grenada (2), St. Lucia (2), St. Vincent and the Grenadines (2), British Virgin Islands (2), Guyana (2), Belize (1), Dominica (2), Turks and Caicos (1), Bahamas (2), Trinidad and Tobago (1).

- o Educational management information systems and indicators of internal efficiency;
- o Financial issues, including revenues and expenditures;
- o Organizational or structural planning for the roles of government, the private sector and NGO's;
- o Resource allocation and the use of EPICS, a simulation developed as a BRIDGES module.

II. WORKSHOP THEMES

Several major themes emerged from the opening presentations. Education managers need to function more effectively as policy advocates to help the electorate and the political directorate understand the priorities of education and to create a national demand for education. Greater dialogue between Ministries of Education, Ministries of Finance and Planning, Agencies and increased community participation in the planning and management of education are required. Improved communication between Ministry officials and their staff will facilitate acceptance of reform within the Ministry of Education. Enhanced policy research and analysis and greater community participation in the management of education will help to actualize the appropriateness of education and will assist in identification of the scope and priorities of education. With respect to finance, there is a need to identify new sources of funding and to reallocate expenditures in a more child centered manner. Finally, education managers require sensitization to educational technology in order to maximize benefits from newly acquired information systems. (The Keynote Address is at Annex G.)

III. PARTICIPANT EXPECTATIONS

Participants identified the following goals with respect to workshop participation:

- o Exchange of ideas with regional counterparts through exploration of differences in approaches to common problems.
- o Enhanced management capability through exposure to the tools of effective education management;
- o Exposure to techniques and strategies to enhance policy formulation, including more effective use of research data;

- o **Increased awareness of information and technology resources, including knowledge of data bases and how to access them;**
- o **Better understanding of education policy making and implementation**
- o **Increased sensitivity to the financial implications of policy and strategies to enhance the appropriateness of resource allocation**

IV. BASIC EDUCATION IN THE ENGLISH-SPEAKING CARIBBEAN: THE EDUCATIONAL CONTEXT OF THE WORKSHOP

The countries of the English-speaking Caribbean face common constraints in the delivery of basic education. Workshop participants identified the following challenges:

- o **The need to strengthen management of the education enterprise through acquisition of the tools for effective management, including techniques and strategies to enhance policy formulation, implementation and evaluation. Enhanced management capability at both the Ministry and school level is required.**
- o **Inadequate resources, including financial, human, information and technical resources;**
- o **A lack of familiarity with effective strategies to market education reform at the national and local levels;**
- o **The need for integrated policies for all levels of the education system that will promote sustainable economic development;**
- o **The need to decentralization the management of education;**
- o **The need to strengthen teacher training curriculum and in-service training programs and to increase teacher effectiveness;**
- o **The need for increased resource centers for teachers;**
- o **Difficulties in attracting and retaining effective teachers;**
- o **The need to diversify curriculum and to develop curriculum that is relevant to the needs of the labor market;**

- o The need to ensure quality through development of appropriate evaluation tools and expertise;
- o The lack of access to secondary education and the need to eliminate the Common Entrance Examination as the selection tool for entry to high school;
- o The need to develop suitable curriculum and facilities to meet the needs of under-achievers;
- o The need to develop broad-based curricula for drop-outs to allow them to maximize their potential;
- o The demands of multi-grade teaching;

V. CONTENT OF WORKSHOP SESSIONS

SESSION #1

Presenter: Noel McGinn, Harvard Institute for International Development

The purpose of this session was to lay out the objectives of the conference, to introduce participants to the BRIDGES modules, with particular focus on the module "Issues in Teaching."

A paradigm of learning was presented in which amount of learning is a function of the time spent learning (Time on Task) and the quality of that process (Rate of Learning). This model is depicted in Figure 1.

STUDENT TIME

TIME ON TASK

AMOUNT OF LEARNING

TEACHER TIME

RATE OF
LEARNING

TEACHER
ABILITY

STUDENT
ABILITY

Figure 1

Participants worked in small groups to model the factors which contribute to increased Time on Task and Rate of Learning. Policy options based on these models were identified. The policy options identified by the small groups are presented in Annex B.

SESSION #2

Presenter: Noel McGinn, Harvard Institute for International Development

The objective of this session was to focus discussion on what constitutes effective teaching. The session focused on a review of the research on and experiences with the factors which lead to effective teaching and the design of teacher training programs. Participants identified characteristics of effective teachers, which are presented in Annex C.

Participants were introduced to SHARE and worked in small groups to develop a plan to improve teaching. Planning relied on research in other countries through use of SHARE. The objectives of the exercise were to identify: 1) what past research says about the factors related to effective teachings, 2) what instruments assist in determining strategies and 3) what policies can be developed that reflect this research. The plans developed by each group are presented in Annex D.

Session #3

Presenter: Noel McGinn, Harvard Institute for International Development

Issues of decentralization were explored through participation in the BRIDGES Training Module "The Well-Managed School System." The purpose of the session was to help participants to understand how a well managed school contributes to learning. The requirements for effective implementation and the conditions for "successful" implementation were identified.

Small group exercises included: 1) negotiations between a two-member team identified as a principal and teacher on a new program proposed by the teacher and 2) identification of a desired change in student behavior, a procedure or process to be implemented to bring about this behavior and organizational support is needed to bring about this change by a six-member team. The group reports for the second exercise are presented in Annex E.

Working definitions of centralized and decentralized schools systems were presented. Centralized and decentralized systems were compared with respect to

access/equity, academic quality, valued, internal efficiency and external efficiency. A rationale for educational decentralization was presented.

Session #4

**Presenters: Tom Cassidy, Harvard Institute for International Development
Vivian Toro, Academy for Education Development**

The purpose of the workshop was to share experiences with the design and development of effective educational management information systems (EMIS). Special emphasis was placed on the specification of data and informational needs. The goals and objectives of an EMIS and data requirements were discussed. The development and use of indicators of internal efficiency were highlighted through a small group exercise in which groups identified a goal objective, indicators, data elements and data sources. Group responses are presented in Annex F.

Session #5

Presenter: Luis Crouch, Research Triangle Institute

Revenue and expenditure and equity and efficiency issues were examined. Key lessons in how to launch an education reform initiative were explored. Conditions for sectoral reform, including conditions for policy dialogue and conditions for policy reform were discussed. Strategies for securing increased funding for education were examined. These included a computerized story-board and APEX.

Session #6

Presenter: Christina Rawley, Harvard Institute for International Development

Resource allocation issues were explored through participation in EPICS, a simulation developed as one of the BRIDGES modules. EPICS, explores the dynamics of education policy making and planning.

VI. ASSESSMENT OF THE WORKSHOP

Participants were generally positive about the usefulness of the workshop. The workshop evaluation form asked participants to rate each session as either Useful, Moderately Useful or Not Useful. Participants rated all sessions as either moderately useful or useful. A detailed analysis of responses to the workshop evaluation will be found at Annex H. A summary of preliminary results is presented in Table 1.

TABLE 1: Summary Results, Workshop Evaluation

	USEFUL	MODERATELY USEFUL
SESSION #1	59%	41%
SESSION #2	67%	33%
SESSION #3	67%	33%
SESSION #4	35%	65%
SESSION #5	58%	42%
SESSION #6	67%	33%

These preliminary results indicate the usefulness of presenting materials in the format adopted by the workshop. These preliminary results reflect the positive comments made by participants who indicated that they left the workshop with new ideas on how to approach policy planning, implementation and resource allocation and a new ability to tap into a regional network.

Comments by participants suggest that future workshops would benefit from some modification. Participant comments indicate the following:

- o A better introduction to BRIDGES is required to orient participants to the program;**
- o Clearer introduction of group assignments is needed;**
- o More discussion of research on effective teaching and on decentralized school systems would be helpful to participants;**
- o Presentations of case studies in decentralized school systems would also be helpful;**

- o More discussion of any experiences with decentralization and acquisition and implementation of an EMIS in the participating countries would benefit participants;
- o More individualized introduction to use of SHARE is required for computer illiterate participants;
- o More discussion of the use of EMIS in educational research would be helpful;
- o Distribution of the Keynote Address.

VII. NEXT STEPS

As a result of the workshop participants report that they will be able to:

"Make greater use of relevant research findings as a basis for making policy decisions"

"Review the draft education policy upon return to country and review the data collection system of the Ministry"

"Disseminate more graphic and statistical data both within Ministry and outside Ministry"

"Hold a series of meetings with principals and staff on how they can be effectively and efficient workers; share ideals with co-workers on issues discussed at workshop; discuss with management the need to formulate a policy on homework; learn how to use the computer so that I'll be able to compile and analyze data effectively"

"Meet with Minister of Education to begin thinking of ways to of implementing relevant ideas"

"Implement a management information system"

"Work towards the implementation of policies on National Testing Systems"

"Identify indicators which can be used to effectively describe the situation and determining these"

"Share information with other members of the Planning Division; renew efforts to prevent request for data emanating from several units within the

Ministry; Develop job descriptions for posts in Policy Analysis Unit (may need assistance on this)"

"Assist the Ministry of education in developing its MIS; share with principals and teachers ideas/concepts from workshop, conduct research, attend further computer classes"

"Read handouts...;and in appropriate forums bring in ideas and suggestions relating to improving the efficiency of the system..."

"Focus with renewed effort on policy formulation; get training for MOE staff on policy formulation"

"Be more analytical and critical when formulating policy; pass on information related to effective school management to principals of schools"

"Be able to offer suggestions in discussions regarding policy dialogue and also to get involved in policy reform"

"List appropriate policy issues relating to improving quality of basic education and prioritize them; present these to the Senior executive of the Ministry and advocate for their receiving priority attention; work on detailed plans related to policy"

"Consider more carefully options before making policy decisions"

Examine the likely impact of proposed policies on learning outcomes with greater detail and rigueur; attempt to follow up on the models presented to see which might be applied"

"Look at the different policies; revise where possible; and discuss policies that we never thought of before"

"Speed up work on the development of a database; conduct a consultation on teacher education"

Respondents indicated that they would benefit from the following activities and assistance:

IN THE NEXT SIX MONTHS:

- o Assistance in establishing an EMIS, including:**

Relevant software and training;

Assistance with data analysis;

- o In-country workshops on a well-managed school system and/or support for training other local personnel, including particular training materials for conducting workshop for principals and selected teachers;**
- o Institution of system of information dissemination that would provide:
Access to education research in Caribbean countries
Research abstracts relevant to small education systems
Access to educational documents and periodicals
Copies of relevant research studies**
- o More hands on experience with software presented and addition experience in simulation and modelling;**
- o Copies of all BRIDGES modules not distributed at the workshop;**
- o Feed-back on process of policy making as applied by participants in their home countries;**
- o A detailed study of present educational policies and status of education in the English-speaking Caribbean, including assessment of resource allocation;**
- o A follow-up survey of participants to ascertain degree of implementation of ideas from workshop;**
- o Sponsorship of a Caribbean seminar on leadership in education involving Ministry of Education officials and school principals;**

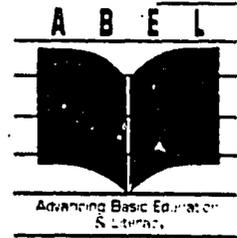
IN THE NEXT 1-2 YEARS:

- o A follow-up workshop for participants in the present workshop;**
- o Further training in software, information management, policy formulation and evaluation;**

- o In-country workshops;**
- o Implementation of education research in the Caribbean;**
- o Report on educational research as it relates to current education policies in English-speaking Caribbean countries;**
- o Continued access to educational research in other countries;**

The evaluation does not provide sufficient information to plan specific interventions. To better guide future project interventions, follow-up contact with participants should assess specific demand for the assistance, included activities identified above and identification of other areas of assistance.





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Annex B

INCREASING AMOUNT OF LEARNING

GROUP #1

TIME ON TASK

- 1) Increase number of school days**
- 2) Increase number of contact hours**
- 3) Improve attendance through compulsory attendance policies**
- 4) Allocation of time as a resource and scheduling policies, including allocation of time for administration, fund-raising, in-service teacher training**
- 5) Institute policies regarding homework**

QUALITY OF LEARNING

- 1) Upgrade teachers knowledge of subject matter and pedagogical skills**
- 2) Formative/diagnostic assessment (in classroom)**
- 3) Clinical supervision/monitoring**
- 4) Availability of instructional and student materials with emphasis on appropriate/relevant learning**
- 5) Role models and examples of successful schooling as motivational tools**

GROUP #2

TIME ON TASK

1) Student learning councils

Goal: Increase participation in the learning process

Means: 2-hour/week session of peer-tutoring

2) Textbook Availability

Goal: All children should be provided with textbooks

Means: Combination of purchases and loaned books according to ability to pay

3) Student Attendance

Goal: Increase student attendance

Means: a) Provide meals (lunch)

b) Meaningful curriculum

c) Provide materials

4) Self-paced instruction

Goal: Maximize student learning

Means: Individualized instruction with personalized assessment

RATE OF LEARNING

1) Teacher Ability

Goal: Increase Teacher effectiveness

Means: Provide an in-service training program

2) Diagnosing student disabilities

Goal; To screen students physical disabilities (eyes, hearing, etc)

Means: Cooperation with public health

3) Community Partnerships

Goal: Increase rate of learning for all students

Means: Invite community leadership and parents to mentor/tutor groups of students

4) Student-based assessment

Goal: To increase supervision of performance in group reference context

Means: Evaluation done by students under the guidance of the teacher

GROUP #3

TIME ON TASK

- 1) Stipulating amount of time teachers can use for personnel matters**
- 2) Adjusting length of school day to compensate for time lost through economic activity**
- 3) Integrating seasonal activities into core curriculum**
- 4) Specific timing of school examinations**
- 5) Specifying time at which parents, interest groups and other groups can visit school**

QUALITY OF LEARNING

- 1) Giving a limited time for under-qualified teachers to qualify**
- 2) Regular revision of curriculum**
- 3) Establish time frame for regular teacher renewal.**
- 4) Establish basic standards equipment and materials at school**
- 5) Institutionalize a system of clinical supervision**

GROUP # 4

TIME ON TASK

- 1) Provision of textbooks**
- 2) Nutritional assistance**
- 3) Increase instructional time**
- 4) Transportation**
- 5) Compulsory Homework with specified length of time for homework**

Quality of Education

- 1) Provide increased learning aids**
- 2) Evaluation of student achievement**
- 3) Supervision**
- 4) Enhance teacher effectiveness**

GROUP #5

TIME ON TASK

- 1) Lengthen school year/day**
- 2) Increase school attendance through school feeding programs**
- 3) Providing texts for all students**
- 4) Provide broadcast media programs**
- 5) Make homework an integral part of school work- students must do home work; homework must be meaningful**
- 6) The individual project approach to teaching should be adopted where useful**

RATE of LEARNING

- 1) Providing teaching materials, technology and/or textbooks**
- 2) Provide recognition of students for school achievement**
- 3) Involve parents in schools and provide centers for parental involvement in school**
- 4) Systematic monitoring of students performance**
- 5) Make salaries attractive so as to maintain good quality teachers**
- 6) Group learning to enhance learning**
- 7) Impart study skills to students**

GROUP #6

TIME ON TASK

- 1) Provide teachers with a better understanding of curriculum content through inductive/participatory teacher training**
- 2) Prescribe minimum contact hours per subject**
- 3) Provide sufficient numbers of quality instructional materials so students can spend more time on tasks independently**
- 4) Decrease teacher time spend on non-curriculum activities**
- 5) Reduce class size and establish acceptable teacher-student ratios**

RATE OF LEARNING

- 1) Appropriate teaching materials**
- 2) Appropriate methodology--participatory learning by doing, etc.**
- 3) Instructional supervision at Ministry and school levels**
- 4) Provide support services (remedial and special education)**
- 5) Establishment of strategies for teacher/student motivating; e.g., effectiveness standards**

Annex C

CHARACTERISTICS OF EFFECTIVE TEACHERS

According to participants, effective teachers are able to:

- ELICIT RESPONSES FROM STUDENTS
- STUDY AND ACQUIRE NEW KNOWLEDGE ON THEIR OWN
- STIMULATE THE CLASSROOM ENVIRONMENT
- SATISFY CURRICULUM REQUIREMENTS
- INCREASE PARENTAL INVOLVEMENT
- ARE A SOURCE OF KNOWLEDGE
- USE LOCAL RESOURCES
- COMMUNICATE WITH PARENTS
- PROVIDE FEEDBACK TO STUDENTS
- DETERMINE/SET CLASSROOM POLICIES AND METHODS
- USE A VARIETY OF INSTRUCTIONAL TECHNIQUES
- DIAGNOSE/ASSESS STUDY NEEDS OF STUDENTS
- MANAGE THEIR CLASSROOMS
- ADAPT TO CIRCUMSTANCES
- TEACH STUDENTS HOW TO LEARN
- UNDERSTAND LEARNING
- MANAGE TIME EFFICIENTLY
- RELATE CURRICULUM TO OUTSIDE WORLD
- SET OBJECTIVES AND CREATE INTEREST
- MAKE LEARNING FUN/ENJOYABLE
- VALUE STUDENTS
- KEEP GOOD RECORDS
- SET HIGH EXPECTATIONS FOR STUDENTS
- MAKE SOUND EDUCATIONAL JUDGEMENTS
- PROVIDE SOLID FEEDBACK
- TEACH CRITICAL THINKING
- ALLOCATE INSTRUCTIONAL TIME ACCORDING TO STUDENT NEEDS

Annex D

DEVELOPMENT OF A PLAN TO IMPROVE TEACHING

GROUP #1

GOALS FOR COUNTRY OF GREENMAX

TEACHER EDUCATION

Teachers must develop ability to assess themselves and to

**a s s e s s
s t u d e n t
o u t c o m e s**

In-service
Monitoring

PUBLIC EDUCATION

Must be consciousness raising with respect to policy goals

Teachability of students - need to make parents more aware of t h e i r
responsibiliti
es

Expectations of system for students (SOCIAL CONTRACT)

CURRICULUM DESIGN

Reorientation of subjects

GROUP #2

I. GOALS:

Literate/numerate students

Develop responsible citizens

Ability to adapt to changing circumstances and to continue Learning

Develop sense of self and an historical identify

Desire to excel

II. GOAL 1:

Increase:

Teachers' content knowledge

Knowledge of profession

Attendance of teachers and students

Teacher's knowledge of student context

Well-defined curriculum

ii.

Selection of teachers with adequate knowledge of content (secondary level education)

In-service training: content upgrading

Pre-service training in content and methodology

GROUP #3

GOAL: To improve literacy and to assess student ability

STRATEGIES:

- Assess student ability**
- Employ diagnostic testing**
- State objectives which are achievable**
- Prepare materials which will address students needs**
- Select or employ a variety of teaching/learning techniques**
- Assess the learning outcomes**

FACTORS:

- Socio-economic background**
- Availability of teaching learning materials**
- Nutrition**
- Parental expectations**
- Students low self-esteem**

OPTIONS

- Nutritional status - provide school feeding program**
- Provide teaching materials**
- Reach out to parents through parental education programs**

GROUP #4

GOALS: To prepare individuals to become creative productive contributors to society

FACTORS THAT AFFECT LEARNING (IN SCHOOL)

- Adequate accommodations**
- Teacher effectiveness**
- Instructional materials**
- Time allocation**

FACTORS THAT AFFECT LEARNING (OUT OF SCHOOL)

- Health/nutrition**
- Linkages to employment**

OPTIONS:

GROUP #5

GOAL: Improve achievement levels
Provide basic education for all
Provide skilled manpower
Develop students who are committed to country and with high self-esteem

STRATEGIES:

More learning materials
Provide at least one textbooks/student
Evaluation - formative/summative - teacher made tests and other methods of assessment
Appropriate in-service training to help teachers to manage items 1-3

GROUP #6

GOALS: Developing motivated teachers/students
Sensitizing teachers to teaching learning situation
Effective and organized time tabling

STRATEGIES:

Attractive salaries
Favorable conditions of service
Initiate research on effects of improved school climate

Annex E

DEVELOPMENT OF PROGRAMS TO EFFECT CHANGE

Group #1

Behavior: Higher Order Thinking Skills

Plan: Staff Development, training principals, meetings with parents

Supports: Demonstration, guidance, positive reinforcement

Group #2

Behavior: Indicipline of students in community

Plan: Increase membership in organized groups

Supports: None identified

Group #3

Behavior: Non-completion of homework

Plan: Direct supervision by teacher

Supports: Regular reporting to principal; parents required to sign homework

Group #4

Behavior: Decrease fighting among students

Plan: Confrontation to be reported by students

Support: In case of a fight, parents must come to school

Group #5

Behavior: Identified generalized process for change in student behavior

Plan: Mobilize teachers/parents/community to inform them of the problem; determine underlying factors with contribute to behavior; draw up plan of attach to identify resources, delegate areas of responsibility, monitor, evaluation

Group #6

Behavior: Students not completing homework

Plan: Conduct brief study to collect information regarding reasons for non-completion; institute ministry policy stipulating amount of homework to be assigned; institute school based program to identify how teachers should deal with homework.

Supports: institute textbook program, strengthen library and reference facilities; institute school based reading program and school program to enhance study skills; improve communication with parents

Annex F

MEASUREMENT OF EDUCATIONAL OBJECTIVES

GROUP #1

GOAL: INCREASE READING LEVEL

INDICATORS: 90% OF STUDENTS READING AT GRADE LEVEL
COMPREHENSION AND WORLD RECOGNITION
INCREASE USE OF LIBRARY
USE OF A WIDER RANGE OF TEACHING TECHNIQUES

DATA ELEMENT: TEST SCORES AND OBSERVATION
LIBRARY RECORDS AND STUDENT REPORT
CLASS ROOM OBSERVATION AND SCHEMES OF WORK
OF BOOKS/CHILD/YEAR

SOURCE: TESTS; LIBRARY AND STUDENTS; TEACHERS

GROUP #2

GOAL: INCREASE EFFECTIVENESS

INDICATORS: IMPROVED ACADEMIC PERFORMANCE
ATTENDANCE
COMMUNITY PARTICIPATION
COMPETITIVENESS
HIGH RETENTION

DATA ELEMENTS: EXAMINATION RESULTS
PTA SIZE, BUSINESS/COMMUNITY SUPPORT
PERCENTAGE OF ATTENDANCE
HIGH ADMISSION
LOW DROPOUT

SOURCES: STUDENT REPORTS
STUDENT REPORTS (SCHOOL RECORDS)
SCHOOL RECORDS
APPLICATIONS
SCHOOL RECORD

GROUP #3

GOAL: ACCESS TO HIGHER EDUCATION

INDICATORS: INCREASE % OF SECONDARY SCHOOL WHO GO ON TO HIGHER EDUCATION INSTITUTIONS
NUMBER OF PLACES AVAILABLE
NUMBER OF STUDENTS WHO SEEK ADMISSIONS AND NUMBER OF STUDENTS ACCEPTED
NUMBER OF SCHOLARSHIPS
NUMBER OF STUDENTS WHO SEEK ADMISSION TO SCHOOLS ABROAD
GROWTH RATE OF POPULATION WITH RESPECT TO NUMBER OF HIGHER ED. PLACES AVAILABLE TO AGE COHORT

SOURCE: SECONDARY SCHOOL AND HIGHER ED ADMISSIONS/PER YEAR
HIGHER ED. INSTITUTIONS(PUBLIC AND PRIVATE)
IMMIGRATION OFFICE

GROUP #4

GOAL: INTERNAL EFFICIENCY

INDICATORS: REPETITION RATE
DROP-OUT RATE
PROMOTION RATE

DATA ELEMENTS: ENROLLMENT BY GRADE BY SEX
NUMBER OF REPEATERS BY GRADE BY SEX
NUMBER PROMOTED BY GRADE AND SEX
END OF YEAR ENROLLMENT AT GRADE 6
NUMBER OF TRANSFERS TO OTHER SCHOOLS

SOURCE: SCHOOL

SPECIAL CONSIDERATION: REPORTS NOT SENT IN
FORMS FILLED OUT INACCURATELY
LATE RESPONSES

GROUP #5

GOAL: INCREASED ATTENDANCE

INDICATORS: DAILY ATTENDANCE RECORDS

**AVERAGE ATTENDANCE BELOW 90%
TIMETABLING: SUBJECT OFFERED ON LOW ATTENDANCE
DAYS
ECONOMY**

**DATA ELEMENT: ENROLLMENT BY GRADE AND SEX
DAILY ATTENDANCE RECORDS
LOCATION AND SIZE OF SCHOOLS**

**SOURCE: CLASS REGISTERS
LOG BOOK
MINISTRY OF EDUCATION
PRINCIPALS AND TEACHERS
SCHOOL OR REPRESENTATIVE SAMPLE**

GROUP #6

GOAL: DELIVERY OF MATERIALS

**INDICATORS: QUANTITY PER SCHOOL PER SUBJECT
FEEDBACK**

**ELEMENTS: NUMBER/SCHOOL/SUBJECT/GRADE
RECEIPTS
INVENTORIES
INSPECTORS REPORTS
SCHOOL REPORTS**

**SOURCE: SCHOOL
INSPECTORS**

**SPECIAL CONSIDERATIONS: TIMELINESS
LOCATION OF SCHOOL
METHOD OF DELIVERY
ACCURACY OF INFORMATION**

KEYNOTE ADDRESS

BY

Dr. Luis Crouch

EDUCATIONAL POLICIES WORKSHOP

conducted by

THE ADVANCING BASIC EDUCATION AND LITERACY (ABEL) PROJECT

Kingston, Jamaica

March 21, 1993

Early in my professional life I had to attend many meetings such as this one, and listen to many inaugural or closing speeches. It seemed we thought we could solve the problems of our societies by having meetings and talking. Being a thinking young person in the 1960s was almost an automatic condition for being a radical. Being an impatient radical and listening to those speeches, within a few minutes I grew tired of what I saw as the banalities of my conservative elders, and would spend the rest of the time not listening to the talk, but musing about whether -- twenty years down the line, presumably after the revolution -- whether when my turn came I would simply revenge myself by boring those who now had to listen to me (whether they were younger or not was irrelevant), or whether I would try to make my talk amusing or intriguing even if it meant exaggerating wildly in order to make my points. My conscience won, and I decided to do the latter. I'll try to tell the truth and challenge conventional wisdom, at least as I see it, even if I have to be a bit more poetic than scientific in order to get at the truth. I may no longer be a revolutionary, but I still have the radical's need to challenge.

Kurt Moses has mentioned several trends around the world and the impact he feels these trends will have or should have on developing country governments, donors themselves, and the relationship between the two. He has mentioned two of these trends: first, democracy and second, an increasingly technocratic dialogue between the leaders and the led, which he has termed the "flip chart presidency" -- a style of which both Ross Perot and Bill Clinton partook of (I assume you heard of these two gentlemen?), and which essentially assumes that people are not stupid, and that you can talk about the issues with the people. He concludes that this trend in governance will result in a style of development project that will have to be both more participatory and community-oriented AND at the same time will put demands on the technocracy to explain itself to the community in ways that assume the community is not stupid.

Kurt Moses and I compared the notes for our talks briefly before this evening, essentially plotting to make sure we would at least not contradict each other in front of you all. We found out instead that we were doing something almost as bad, namely agreeing with each other. Since social scientists and donors so seldom agree with each other, agreement is usually interpreted by the host country as a kind of plot, which is why I said that I found our agreement almost as alarming as the possibility that we might have completely contradicted each other... This kind of agreement might reduce our credibility just as much as publicly contradicting each other! However, as you will see, I arrive at my conclusions from an entirely different angle, which I think lends support to the position we both have espoused.

I believe it would not be an exaggeration to say that there is a crisis in the donor agencies. It is not generalized: it is worse in some sectors than in others, and worse in some agencies than others. In some agencies it is only beginning, and will get much worse before it gets better. The crisis has two origins. One, from the outside, the crisis is simply a reflection of the fiscal crisis of the state, particularly in the U.S., and of the taxpayer questioning the use that is made of the money, particularly at a time of high unemployment, crumbling infrastructure, and poor educational performance at home. Under these circumstances, the taxpayer naturally wonders about the wisdom of spending money assisting other countries. Nativist, and America-first sentiments were ably utilized in the U.S. campaign by Pat Buchanan, who at first appeared to pose a serious challenge to George Bush, and by Ross Perot, who might have posed a serious challenge to both Clinton and Bush. There are fiscal and monetary crises in Europe as well, largely related to the effort required to rebuild Eastern Europe, which manifest themselves in the form of monetary crises such as we saw last summer (with interest rates in Sweden hitting several hundred percent in real terms), which could be interpreted as nothing but Germany's attempt to force the rest of Europe to pay for its reabsorption of Eastern Germany. Record unemployment in France, deep economic troubles in Britain and even Japan. Many of these are structural problems, not mere business cycle problems, and they will take some time, perhaps a decade, to solve. Under these circumstances, foreign assistance will be cut back, and perhaps will not increase again for a long time. The global cutbacks may not be very drastic. The drastic impact will be felt in sectoral and geographic areas that cannot justify themselves, in terms of their social and economic impact in the inside of the societies.

So much for the crisis from the outside of the agencies, which is probably well known. There is also, and this is somewhat more hypothetical, or more of a forecast than an analysis of current events, I think, an impending internal crisis at well, caused by the fact that the international technocracy does have a conscience after all, and does evaluate the impact of its projects. During the 1970's and 1980's a very serious questioning of infrastructure projects and agriculture projects started, particularly at the World Bank. Up until then, those were favorite areas of lending. But the realization started to come in that some of these projects were not showing a very good rate of return in financial terms, that they were having little positive impact on the lives of those affected by the project loans, and that in some cases, such as in the ecological area, there was actual damage done. Couple this with the fact that countries have to pay back the loans whether the project pays off or not, and anyone with a conscience has to be ashamed at the lack of success of these projects. Just as the Bank and perhaps other donor agencies were scaling back on these sectors, it and they were building up in the human resources sectors. Bureaucratic success was not in good project design, or in showing good success in the projects, but in how many loans could be approved and how fast the money could be disbursed, and the real results be damned. Now, a lot of good scientific evidence, as we will see during this seminar, shows that human resources, in particular education, can be an excellent financial investment. But from there, there was a leap in logic that said that ANY investment in education, that ANY donor project in these areas was, ex-ante, a good idea, and would have a good return. In fact, the presumption was so strong, that the Bank essentially stopped doing cost-benefit analyses of its education projects. My hypothesis here is that the project chickens are now coming home to roost, and they might be a lot scrawnier than one had hoped.

Add the internal crisis to the external questioning by politicians and taxpayers, and we have the

makings of a real mess.

Those that think this is proof that education is not a good investment, and that education projects should be abandoned in favor of some other sector, would be utterly crazy. Education continues to be an excellent and necessary investment. The problem lies elsewhere altogether. Let me sketch out for you what I believe to be a key problem.

Remember the 1950s and 1960s? Remember community development projects? Integrated community development? Integrated rural development, that involved education, health, and increased agricultural productivity? The record was not good. The failure, we all now know, was that working at the micro level was useless if the macro-economy was totally out of alignment. What was the point of teaching farmers to produce more if, because of unfair and mistaken policies they could not sell their output? What was the point of education and improving quality if the educated could not find jobs, due to the unemployment caused by massive macroeconomic mismanagement? Now that some of our economies have learnt from past mistakes, community development is likely to become all the rage again, except that this time it has a much better chance of working. Unholy alliances of old-fashioned community-development liberals and conservative local government and decentralization types are beginning to form working groups and are effectively working together in this and related areas such as local micro-enterprise development. And the donors are supporting these kinds of efforts. If we are right in our analysis, these efforts are now much more likely to pay off.

I assert that something similar has taken place in education. Donors, host country governments, and other projecteers became obsessed with the technology, the nuts and bolts, the supposed science of education, and entirely forgot who this was for, and whether there was any real demand out there for what they had to sell. I am not questioning whether there is or was real demand in the communities for education. The need is self-evident and cries out to anyone with a conscience. What one questions is whether there was real, sustainable demand IN the communities AND in the host country societies as a whole for sustaining the TYPE of schooling solution being purveyed by donors and governments, based on debt and technique.

Let me submit to you the radical thought that while there is room --in fact, there is need-- for technocracy and for technocratic solutions, the key problem for educational development is social and political will and participation both on the part of the communities and the policy elites. Particularly, let me emphasize that community participation is not something one provides as an adjunct to the "standardized" project list. I am not suggesting that you can solve the problem by simply adding one more technocratic professional named "community organizer" to the already long list of technocrats -- curriculum specialist, teacher training specialist, textbook specialist, education management information systems specialist, distance learning specialist, educational research specialist, educational planning specialists, and all the other purveyors of supposedly effective technical fixes to social problems. The impulse is just to add "community organization" expert to the list, and assume that this is going to take care of things. It does not, as the lessons from the agricultural community organization of the 1950s shows us. I realize I am saying radical things, and that many of you are probably made very uncomfortable about what I am saying, but I hope at least you're not bored. The point is that if, as a society and community, we don't know where we are going, why we are going, or even how to get there,

then having excellent mechanics to fix the car isn't going to do us much good. Which is not to say the car does not need fixing. It does need the technical fix, and badly, but that's the least of our problems. In short, I am suggesting that things like policy work and community participation in education have to be at the heart of our approach to education, and the other technical specialties, while important, are secondary.

Am I being romantic? Is this just some quaint revival of radical notions from the 1960s? I submit not. I submit to you that this is hard-headed and practical, that until we solve the policy and community issues our projects will tend to waste money, the taxpayers will rebel, and we will be out of business. How much more hard-headed can you get? Let me say it again: we will be out of business.

Now, on that business note, let's get practical. What is on the agenda? What am I suggesting we do, specifically?

Well, to begin with, let me emphasize for the nth time, at the risk of boring you, that I am not suggesting we abandon the technical or technocratic approach. While I may show a little impatience with the technical fix and the long lists of specialists, I agree that they are necessary. I am suggesting that we have neglected working in some areas, and that we need to urgently strengthen our work in these areas. What are these areas, in practical terms? I see essentially two inter-related areas, each one divided in turn into two sub-themes.

First, we have to become much more able on the policy arena. Second, we have to re-consider education finance.

On the policy side, I distinguish two levels: high-level policy dialogue to create national or budgetary-level demand for education, and community work to develop community participation in education.

To be brief, let me just say a few words about each. At the high level, policy dialogue has to take place between education authorities and financial authorities. We have to become far better sales persons on the importance of education to our finance and planning ministries and chief executives. Education will not come cheap. One of the problems with the technical fix side of things is the belief in magical bullets, that if we just shorten the formal education of teachers and replace it with in-service training, or if we just put radios in the classrooms, or if we just use modular learning, we will get education on the cheap. But education will not come cheap. We will continue to need resources, massive resources in some cases, and we have to become far more effective spokespersons for our ministries at budgetary time. We have to learn how to use Madison avenue techniques, together with the latest social science evidence, to sell our ministries. We have to learn how to use the NGOs to support us in this endeavor because of their frequent trust and connections with the rich in our societies, who in turn have connections to the finance ministers. We cannot assume that we can communicate the message once, in a technical paper that the Minister of Finance will not read anyway (partly because it comes from those people down in the Education Ministry that the Minister of Finance considers a bunch of touchy-feely softies). We must communicate massively and pro-actively, and in terms the financiers will understand. This will take imagination and brainpower, but will yield results.

Policy work needs to be done at the community level as well. Here the issue is not old-fashioned community organization. Communities organize themselves well enough to take over functions that they see as real assets. Peasant communities have never needed much outside organization to, say, take over a landlord's land. They might need a little inspiration and technical assistance from an outsider, but once inspired they do not need much formal organization. The only time they need much in the way of formal community organizing is when the government is trying to get them to take over a supposed asset that is actually a liability, such as an under-funded school. And then all the organizing in the world will yield little fruit. If the school is well-funded by the center, then getting communities interested in management is no problem.

There is finally policy work that needs to be done inside the ministries. An education system that is child and community centered, entrepreneurial, and proactive, will meet resistance from those who want to do their routine job and collect their paychecks. Those people will have to be won over to a project of national educational renewal. Those who want to renew their education systems will have to communicate their zeal and passion to those who prefer business as usual. Again, this will not be easy, but there is no alternative.

On the finance side, there are a couple of levels as well.

First, on the revenue side, Ministries of Education have to become much more proactive in helping Ministries of Finance think of new sources for money. The timidity and lack of imagination sometimes shown by our Ministers, in demanding budget allocations, is frightening. Sometimes this means tapping sources of tax moneys that are under-exploited precisely because the taxpayers do not appreciate paying for something they don't see the results of. Sometimes it means we have to become much better sales people for our systems. This does not mean making up silly billboards to put up by the side of the roadways, or trite television spots. It means communicating real zeal, passion, and truth about the importance of education.

On the spending side of the finance equation the issue is similar. Re-allocating expenditures in a child- and community-centered manner will be necessary. This, and similar areas, is where the policy work and the finance work intersect. Financial reallocations are always problematic because they affect interest groups. Allocating money from the universities to the basic levels will have the university students up in arms. Intense policy work and policy dialogue will be necessary here too.

In short, it is indeed possible to come up with a practical agenda for reform. We will show you some mechanical tools and approaches that have worked elsewhere to promote awareness in the public and in other ministries about some of these things. But there are two final points to remember here. First, even though these things we will show you have worked well in other situations, they are only mechanical tools. The secret of their working well in other cases is the social and political process that goes along with the mechanics, so that these tools and approaches cannot be transferred wholesale. Second, on policy reform and dialogue, it is important to note that policy reform is particularly not suitable for copying. In fact, in some sense the better it has worked in some places, the greater the dangers. Why? Because the more successful an approach has been in one place, the easier it is to fall into the trap of assuming that what accounts for the success is the visible or mechanical part. Most highly successful reforms are successful precisely

because they are original, those that perpetrated them had few models to go on, and therefore they had to go to first principles, they had to experiment, they had to test and evaluate, until they got it right. Those who come later to copy always try to skip the reasoning based on first principles as source of design ideas, they try to skip the local experimentation and evaluation. This accounts for reform and project fatigue -- a project or reform idea works well at first, and the more it gets imitated and gets out of context, the more it seems to lose steam. How many failures have we seen in attempting to transfer the American education-research-and farming system known as the land-grant system? If a reform movement--no matter how modest-- starts in your countries, I urge you to realize that you have to figure out your own solutions for yourselves, and that aside from inspiration and knowledge about general principles, there is little to copy from the U.S., Japan, Chile, England, or whatever. This is not some fuzzy bromide, but is based on the logic of how one actually solves problems. Going back to first principles, testing and experimenting, are key. Selling education and winning budgets and reforms on the policy battlefield are also key. Hopefully in this seminar we can inspire each other about how to approach these tasks. I think you will agree that indeed Kurt Moses and I have come up to the same conclusions, but by different routes, and you will absolve us of the accusation of plotting.

One last point. You may have noticed that I say "our ministries" or "our countries." You may be thinking that I'm overtaxing your hospitality by going native. I am not. In spite of my yankee accent and other anglo-saxon characteristics, I am a native of one of the larger neighboring islands to the east of here (the Dominican Republic), and have lived everything of which I speak. I come to you not as a scholar or as a development entrepreneur (though I hope I am both), but as a member of the Caribbean community, and what I say to you comes not only from the head but from the heart. Thanks for listening.

ANNEX H

Analysis of Participant Evaluations

Introduction

The design of the evaluation form for the Workshop was based on the Workshop's agenda. Changes made at the Workshop to drop a presentation and incorporate its topic somewhat into what was ongoing, to add an additional activity and to change the closing format were not reflected in the comments requested.

The evaluation was divided into five Sections:

- A. comments, and gradings of Useful, Moderately Useful and Not Useful, on the Workshop's presentations;
- B. "I will probably do the following as a result of the Workshop;"
- C. "I had expected the following from this Workshop;"
- D. "What follow-up activities would be most useful to you;"
- F. comments and gradings on logistical components of the Workshop.

Section E asked the respondents to indicate whether they were Permanent Secretaries (PS), Chief Education Officers (CEO), Education Officers (EO), or Assistant Education Officers (Other). There were 23 respondents as follows: PS-6, CEO-6, ED-7, Other-4 (including two unidentified, one Asst. Ed. Officer, one Director).

As comments from the evaluation forms on the Workshop, and especially items B, C and F, have been presented verbatim in the body of the report, they will not be repeated here. However, analysis of the comments by the positions of the respondents will include some grouping and restatement of the comments.

Section A

The Workshop focussed on three issues, each with two or three presentations. There were very few comments for the issue sections in general, for the presentations or for the keynote presentation. The gradings of the Workshop presentations fell into either Useful or Moderately Useful; there were none in the Not Useful column and a few with no grading offered. In the analysis, we looked at the breakdown between Useful and all of the rest (Less Useful) for each class of respondent, and noted particularly where there were more Useful responses than responses for Less Useful, and vice versa. The results were as follows:

1. Keynote Presentation setting a context for the Workshop: was Less Useful for the CEOs and Education Officers. A later comment was made by an EO that the availability of a copy of the

presentation would have allowed for better questioning by the participants.

2. **Instructional and Curricular Issues:** presentation on Introduction to BRIDGES and SHARE was Useful to the PSES, CEOs, the Others. It is interesting that the EOs, who are generally more directly involved with curricular issues did not find this presentation as useful, perhaps either because they knew the material or because they did not see how they could use it in their daily work.

3. **Management Issues:** in general the session was Useful for the PSES and the CEOs, which is not surprising as they, more than the EOs, are more generally responsible for management of the kind discussed.

Management Issues: presentation on EMIS Design and Development was Useful for the CEOs and Others, but was Less Useful for the PSES. In fact, the difference between the Permanent Secretaries' perceptions and those of the Chief Education Officers' were directly opposite, with five of six CEOs finding the presentation Useful while only one of six PSES graded it as Useful. Perhaps the linkage of EMIS to policy formation was not as obvious to the PSES or that they do not habitually access computers and rely on others for data.

4. **Resource Allocation Issues:** presentation on Strategies for Funding was graded as Useful by the CEOs and Others, but Less Useful by the Education Officers.

Resource Allocation Issues: presentation on Resource Allocation and EPICS was Useful for the PSES, EOs, and the Others.

Section B

Section B posed the following "I will probably do the following as a result of the Workshop." There were 28 individual items mentioned by the respondents, including three who made no response. Review/Implement an MIS was mentioned by at least one PS, CEO and Education Officer. The only other response that cut across three respondent groups was Be more analytical and critical when formulating policy. Two PSES and CEOs mentioned Renewed effort on policy formation, while Share information with appropriate personnel was mentioned by both PSES and Education Officers. Two Education Officers mentioned Learn how to use computers, but the remaining comments were both unique to the level of the respondent and in category.

Section C

"I had expected the following from this workshop" was the item

posed for this section and it generated fifteen responses, plus seven from all levels of respondents who gave no response or who indicated that they had none to give. Eight, from across the spectrum, said Ideas or methods on policy formulation, which is not surprising as all had received a copy of the Workshop's agenda before their arrival. The remainder of the comments were unique, except for Introduction to and experience with management tools, software and techniques which was cited by at least one person in each category of respondent.

Section D

Section D asked for follow-up activity needs in general, in the next six months and in one to two years. There were only four responses to the general needs, but two of them, from Education Officers, mentioned the need for Research on Caribbean education, a request that was later made twice by PSES, once by a CEO and eight more times by EOs. This suggests that either upper level administrators have sufficient research, no time to read it, or don't feel the need for it, and/or that EOs are not getting enough research and feel that it would be useful to them.

Not surprisingly, of the eight PS responses, half of them requested more information on educational policies and policy formation, especially as relates to Caribbean needs. Assistance with EMIS development and data analysis was sought by two PSES, one CEO and two EOs. Leadership and management training was mentioned by two CEOs, and three EOs thought that a workshop in the future to revise and evaluate the results from this workshop would be beneficial.

Section F

This section requested both grading and comments about the logistical facets of the Workshop. While the comments numbered only seven, two of them indicated that directions to group activities were unclear, echoing comments made above. Grading was on a five point scale, from Excellent through Average to Poor. There were no grades awarded for Below Average or Poor, but there were occasional absences of any comment. This was especially true for items relating to travel and food, reflecting either politeness or Jamaican respondents who didn't have travel arrangements made for them.

For analysis purposes, gradings of Excellent and Above Average (Above) were contrasted with all other responses, or lack of response, (Below) and a majority was noted when it existed. The PSES and EOs rated all items as Above. "Usefulness of materials available as resources" and "Appropriateness of the mix of participants" were rated as Above by all groups, as was "support provided to you for by Workshop staff" and "Travel and lodging arrangements."

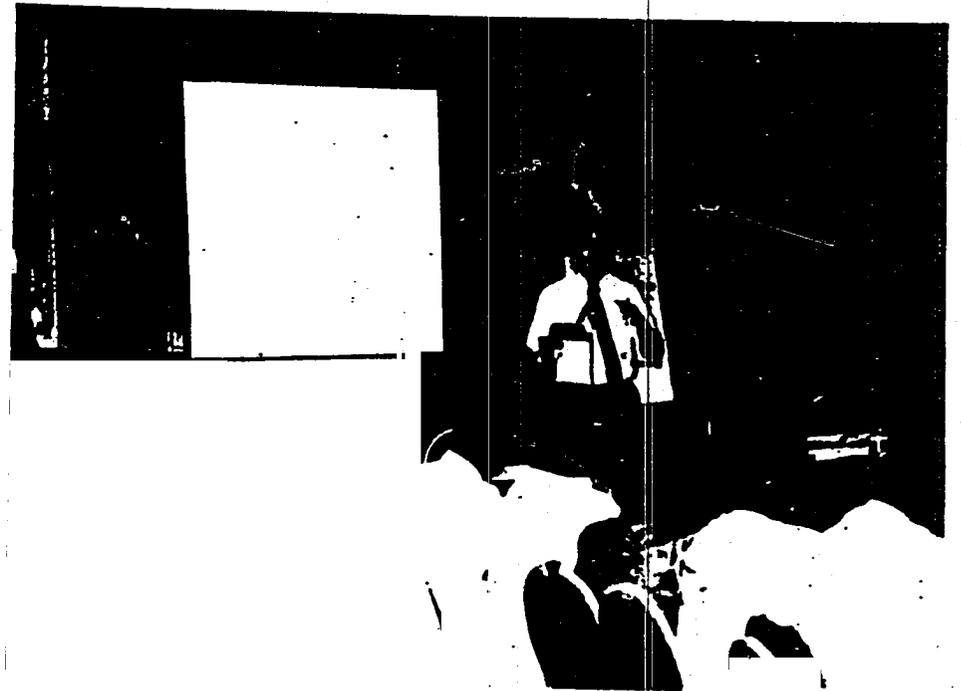
While there were no cases where there was a majority for Below on any logistical item, the CEOs were equally balanced between Above and Below for three items: "Availability of presenters for follow-up discussions", "Usefulness of computers available for the Workshop", and "Meals and food provided."

Conclusion

The Workshop achieved its goals of exposing the participants to tools and methods for educational policy development, and showing them how they have been used elsewhere. In spite of a great deal of attention to the particular needs of the Caribbean nations, more research and experience with the tools in very small countries would have made the presentations more immediately useful to the participants. Follow-up assistance from the Workshop might help to generate some of this research.

The Workshop was apparently useful to the mix of participants, which given the range of responsibilities present and the time available to cover materials, might have been a difficulty. Success for this is due to the efforts of the presenters. Logistical arrangements were generally greatly appreciated, though there were suggestions that a Jamaican cultural presentation would have been a welcomed change from the Workshop's intensity.







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1994

1994

1994

1994

1. Upgrade teachers' knowledge of subject matter and pedagogic skills
2. Formalize diagnostic assessment
3. Supervision/monitoring of teaching
4. Availability of instructional and student materials with emphasis on appropriate/relevant materials
5. Field visits and examples of successful teaching as motivational help

GROUP 1 PICTURE



Student
 Clinical
 Field
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