

# **Mississippi Consortium for International Development Textbooks and Learning Materials Program – Zambia**

**Grant No.: RLA-A-00-05-00073-00**

## **Quarterly Report October 1 – December 31, 2005**

### **I. Activities undertaken during reporting period**

#### **A. New Activities Undertaken During the Current Reporting Period**

The Mississippi Consortium for International Development (MCID) was awarded the three-year Textbook and Learning Materials (TLMP) grant on September 30, 2005 with a start date of October 1, 2005. MCID was notified that it would be working in Zambia at this time – one of the two countries MCID targeted in its proposal.

#### **Team Meeting October 11-12, 2005**

MCID began its activities with a project strategy meeting October 11-12 for all TLMP team members including: Dr. Vivian Taylor, Project Director; Dr. Ally Mack, MCID's Executive Director and Corporate Backstop for TLMP; Mr. Douglas Sheldon, TLMP Coordinator; Dr. Shelby Lewis, Assessment Team Leader; Dr. Lula Collier, Assessment Team Member; Ms. Cristina Radulescu, Administrative Assistant; Ms. Sylvia Gray, Financial Manager; and Mrs. Adrienne Graham, MCID Associate Director. The goal of this meeting was to discuss the entire program, including goals and objectives, roles and responsibilities, budget management, and the work plan. The team was able to meet with an employee of the Zambia Ministry of Education who is on leave to pursue a Ph.D. at Jackson State University. This motivational meeting was invaluable in building a team atmosphere and ensuring that everyone understood the program and their role in its successful implementation.

#### **TLMP Post Award Conference**

MCID's team attended the Conference in Washington, D.C., November 6-9, 2005. Dr. Ally Mack, Dr. Vivian Taylor, Mr. Douglas Sheldon, Dr. Shelby Lewis, and Mrs. Adrienne Graham participated in the meetings. Dr. Beverly Hogan, President of Tougaloo College, attended the conference on the first day. She spoke to the attendees and joined Dr. Sarah Moten and other Presidents for a luncheon meeting.

#### **Assessment Preparations**

MCID began communicating with the USAID Mission in Lusaka immediately upon its award, specifically with Rick Henning, Education Officer. The Assessment was planned for November 12 through December 10, 2005 and included the participation of the Project Director, Project Coordinator, Assessment Team Leader and three Assessment consultants. However, on November 9, following contact with the Mission by MCID's Executive Director and Dr. Sarah

Moten, the Assessment was postponed. As the USAID Mission had a number of other activities that required their attention, it was requested that the Assessment occur in late January.

After further communication with the Mission, it was agreed the Assessment should be conducted January 22 – February 5, 2006. The Assessment Team would include three members, namely: Dr. Vivian Taylor, Project Director; Dr. Shelby Lewis, Assessment Team Leader; and Dr. Lula Collier, Assessment Team Member. MCID has secured the Country Clearance from the Mission and worked very closely with Mr. Henning and Ms. Liz Chisala. Ms. Chisala confirmed all the requested meetings for the Assessment and assisted with logistics such as hotel information, transportation and other issues. It is also planned that Mr. Freeman Daniels, USAID CTO and Backstop Officer for MCID, will join the Assessment Team.

The draft itinerary for the Assessment is attached to this report along with the resume of Dr. Lula Collier. (Dr. Lewis' resume was in the original proposal as she was proposed as the Assessment Team Leader at that time.)

### **Writers and Editors**

MCID has developed a general set of criteria for writers and editors and developed a pool of these specialists in the U.S. These specialists are pulled from all four MCID member institutions as well as from other HBCUs. During the assessment in Zambia, the team will meet several candidates for these positions as well. While the MCID In-Country team will continue to increase the database of specialists in Zambia relevant to this program, the final criteria and selection will not be made until the Activity Identification and Design Plan has been approved by USAID. MCID will balance the team in all aspects, including ethnicity and gender.

Upon approval of the Activity Identification and Design Plan, MCID will conduct a workshop for writers and editors in Mississippi and in Zambia. Dr. Taylor has outlined the agenda and topics for the workshop which will cover everything from culture to subject areas to language. The workshop design will be refined as appropriate after approval of the plan. The outline is attached to this report.

## **B. Project Management**

### **1. Human Resource Deployment**

MCID issued staff contracts immediately upon notification of the award so that the Team was able to focus on the work at hand without delay. In addition, the Assessment Team Leader was immediately contracted as a consultant in order to begin preparations on this key component. MCID terminated the services of the Program Coordinator, Mr. Douglas Sheldon, in November. At this time all Team members as well as other MCID staff are assisting with these responsibilities. While MCID has tentatively identified an In-Country Program Manager, a final decision on the occupant of this position will not be made until a full review of all potential candidates has occurred.

### **2. Home and Field Office Management Activities**

MCID's Executive Director has been very involved in the TLMP program. This is to ensure the smooth startup of the activities as well as to keep the project on track. She will continue this

commitment throughout. MCID has dedicated office space and procured and allocated all necessary equipment for the program. While all logistics have been completed through the home office (Jackson, MS), it is expected that the In-Country Program Manager will handle these arrangements in the future. This individual will have daily communication with the home office through email and telephone calls.

### **3. Field Visits**

The Assessment is scheduled to take place January 22 – February 5, 2005.

### **4. Interaction with USAID (Washington and Country Office)**

MCID's Backstop Officer is Mr. Freeman Daniels. He has played a key role in facilitating communications specifically for MCID and providing guidance on contractual issues. It is important to note that he provided a great deal of insight relative to this project during the conference as well. Mr. Daniels will travel to Zambia and participate in the Assessment.

## **C. Partnership Interaction**

### **Operation of Program Advisory Committee (PAC)**

The PAC will be established in the coming months following the Assessment and in close coordination with USAID/Lusaka and the Ministry of Education. Other partnerships will also be forged during and following the Assessment.

**II. Monitoring and Evaluation Status**

**A. Progress towards Milestones (for past Quarter and upcoming 6 months)**

| <b>Task</b>                         | <b>Milestones</b>   | <b>Plan Date from Last Quarter</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b>  | <b>Comments</b>                      |
|-------------------------------------|---|------------------------------------|--|--|--------------------------------------|
| Grant Agreement Signed              | Grant agreement executed  | Sept. 30, 2005                     | Sept. 30, 2005                             | Completed  |                                      |
| Project Staff hired                 | Contracts issued, orientation conducted   | Oct. 2, 2005                       | Oct. 2, 2005                               | Staff hired and working on project activities.                                 | Program Coordinator will be replaced |
| Assessment Team Leader Contracted   | Contract issued, orientation to program, conference calls with Team   | Oct. 7, 2005                       | Oct. 7, 2005                               | Assessment Team Leader has actively participated in the project since October. |                                      |
| Team Meeting                        | PD, PC, Assessment Team Leader, Financial Manager, Administrative Assistant, and MCID staff meet on technical and logistical aspects of the program   | Oct. 10-12, 2005                   | Oct. 10-12, 2005                           | Team is fully briefed prior to DC workshop                                     |                                      |
| Attend USAID Post-award Workshop    | PD, PC, Assessment Team Leader, MCID's Executive and Associate Director and President of Tougaloo College travel to Washington, D.C. for 3-day post-award workshop and participation in training to strengthen capacity to manage and implement the project | Nov. 6-9, 2005                     | Nov. 6-9, 2005                             | Key staff attend all training sessions   |                                      |
| Prepare and Submit Annual Work Plan | Development of work plan for a one year period to include:<br><ul style="list-style-type: none"> <li>- Key activities planned</li> <li>- Estimated completion dates</li> </ul> -Line-item budget for Base Year  | Dec. 2005                          | December 20, 2005                          | Draft Work Plan submitted  |                                      |

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| <b>Task</b>                          | <b>Milestones</b>  | <b>Plan Date from Last Quarter</b> | <b>Date Completed or Currently Planned</b>                     | <b>Status</b>  | <b>Comments</b>  |
|--------------------------------------|--|------------------------------------|--|--|--|
| End of First Quarter                 | Quarterly technical report submitted by Jan. 20, 2006; quarterly financial reports/forms submitted by Feb 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff   | Dec. 31, 2005                      | January 20, 2006 (Technical) and February 14, 2006 (Financial) | Deadline was extended  | Report to be submitted by new deadline   |
| TLMP Launch                          | MCID's Executive Director and Tougaloo College President will attend Launch in Accra, Ghana  | January 17, 2006                   | January 17, 2006   | Launch attended.   | Launch successful with attendance of First Lady Laura Bush and President of Ghana.   |
| Hire In-Country Project Coordinator  | In-country Project Coordinator (IPC) will have technical and logistical responsibilities. The Coordinator will hire support staff, establish office  | Dec. 31, 2005                      | Jan. 25, 2006  | Project Director will complete this process while in Zambia on the Assessment                                | The Program Manager will identify and assist in hiring a full time coordinator and secretary. Two candidates under consideration; finalization of process taking place within two weeks. |
| Perform In-Country Assessment Review | Assessment will be approximately 2-weeks long and may include but not be limited to:<br>-Review options developed by MOE and USAID mission for the focus on the TLMP activity<br>-Assess each option to validate feasibility through: Interviews, Observations, Focus Groups, and Test scores review | Jan. 21 – Feb. 4, 2006             | Jan. 21 – Feb. 4, 2006   | Shelby Lewis, Vivian Taylor and Lula Collier make up the Team. Freeman Daniels (USAID) will also participate | Team completed visit, preparation of report is in progress.  |

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| <b>Task</b>  | <b>Milestones</b>   | <b>Plan Date from Last Quarter</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b>   | <b>Comments</b> |
|--|---|------------------------------------|--|---|-----------------|
| Project Advisory Committee (PAC) established         |   | Feb. 2006                          | Feb. 2006                                  | The ground work for establishing the PAC will be laid during the assessment. USAID/Lusaka and the MOE will greatly assist on this activity. |                 |
| Submission of Assessment Report                      | Assessment report submitted internally to MCID executive Director; reviewed and revised. This is a technical and logistical report required by MCID.  | Feb. 10, 2006                      | Feb. 15, 2006                              | Report being finalized.   |                 |
| Develop Detailed Activity Identification Design Plan | All tasks and strategies will be developed and time-framed to assure placement of high quality, cost-effective textbooks and/or learning materials in Zambian schools.                            | Feb. 28, 2006                      | Feb. 28, 2006                              |   |                 |
| Activity Identification Design Plan Approved         | Plan submitted, revised as needed   | Mar. 2006                          | Mar. 17, 2006                              |   |                 |
| Implement Activity Identification Design Plan        | Upon approval of activity design/plan , key personnel (including the assessment team) will travel to Zambia to present the plan to the MOE, PAC and other stakeholders and launch in-country work | Mar. 2006                          | Mar. 31, 2006                              |   |                 |

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| <b>Task</b>                                      | <b>Milestones</b>  | <b>Plan Date from Last Quarter</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b>  | <b>Comments</b>   |
|--|--|------------------------------------|--|--|---|
| Publisher Identification                         | Zambian publishers will be sourced and assessed for capabilities. Regional publishers will also be identified as back-up. US Program Coordinator will travel to Zambia to assist in this process.  | Mar. – May 2006                    | Apr. – June 2006                           |  |   |
| Design of Learning Material                      | Primary authors will be identified in Zambia and in the USA. Authors will be organizations and/or individuals. A primary Editor-in-chief will be identified along with editors. A draft workshop has been designed for writers in both countries. It will be refined and conducted upon approval of the Activity Identification and Design Plan. | Mar. 2006                          | Feb. – Apr. 2006                           | A pool of writers has been identified in the US. Final selection will be determined by the subject area, content, and grade focus. The Assessment Team to meet with potential writers and editors during the assessment in Jan. 2006 | Assessment Team met with potential writers and editors and will make recommendations in report. |
| End of Second Quarter                            | Quarterly technical report submitted by Apr. 20, 2006; quarterly financial reports/forms submitted by May 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff   | Mar. 30, 2006                      | Apr. 20, 2006, May 14, 2006                |  |   |
| Development and Compilation of Learning Material | Authors will research, write, and compile textbook materials in concert with the editor in chief. This process will be driven by the priorities of the MOE reflected in the Activity Identification Design Plan. Materials will be relevant as a result of the continuous involvement and ownership of the MOE, PAC and other stakeholders.      | Mar. – Sept. 2006                  | Apr. – Sept. 2006                          |  |   |

| <b>Task</b>                   | <b>Milestones</b>   | <b>Plan Date from Last Quarter</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b> | <b>Comments</b> |
|-------------------------------|---|------------------------------------|--|---------------|-----------------|
| Distribution plan development | Distribution may be an issue. MCID will work with the MOE to review and revise their plan relevant to the anticipated materials.  | May –Aug. 2006                     | May – Aug. 2006                            |               |                 |
| End of Third Quarter          | Quarterly technical report submitted by July 20, 2006; quarterly financial reports/forms submitted by Aug. 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff | June 30, 2006                      | July 20, 2006, Aug. 14, 2006               |               |                 |

**B. Deliverables (for past Quarter and upcoming 6 months)**

| <b>Work Plan Reference</b>       | <b>Deliverable</b>  | <b>Plan Date from last Q</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b>                                  | <b>Comments</b>                                 |
|----------------------------------|---|------------------------------|--|--|---|
| Grant Agreement Signed           | Grant agreement executed  | Sept. 30, 2005               | Sept. 30, 2005                             | Completed                                      | Agreement signed.                               |
| Project Staff hired              | Contracts issued, orientation conducted   | Oct. 2, 2005                 | Oct. 2, 2005                               | Staff hired and working on project activities. | Program Coordinator replaced with Shelby Lewis. |
| Attend USAID Post-award Workshop | PD, PC, Assessment Team Leader, MCID's Executive and Associate Director and President of Tougaloo College travel to Washington, D.C. for 3-day post-award workshop and participation in training to strengthen capacity to manage and implement the project | Nov. 6-9, 2005               | Nov. 6-9, 2005                             | Key staff attend all training sessions         |   |

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| <b>Work Plan Reference</b>                           | <b>Deliverable</b>  | <b>Plan Date from last Q</b> | <b>Date Completed or Currently Planned</b>         | <b>Status</b>         | <b>Comments</b> |
|--|---|------------------------------|--|-----------------------|-----------------|
| Prepare and Submit Annual Work Plan                  | Development of work plan for a one year period to include: <ul style="list-style-type: none"> <li>- Key activities planned</li> <li>- Estimated completion dates</li> </ul> -Line-item budget for Base Year | Dec. 2005                    | December 20, 2005                                  |                       |                 |
| End of First Quarter                                 | Quarterly technical report submitted by Jan. 20, 2006; quarterly financial reports/forms submitted by Feb 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff  | Dec. 31, 2005                | January 20, 2006 (technical and February 14, 2006) | Deadline was extended |                 |
| Submission of Assessment Report                      | Assessment report submitted internally to MCID Executive Director; reviewed and revised. This is a technical and logistical report required by MCID.  | Feb. 10, 2006                | Feb. 15, 2006                                      |                       |                 |
| Develop Detailed Activity Identification Design Plan | All tasks and strategies will be developed and time-framed to assure placement of high quality, cost-effective textbooks and/or learning materials into Zambian schools.                                    | Feb. 28, 2006                | Feb. 28, 2006                                      |                       |                 |
| End of Second Quarter                                | Quarterly technical report submitted by Apr. 20, 2006; quarterly financial reports/forms submitted by May 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff  | Mar. 30, 2006                | Apr. 20, 2006<br>May 14, 2006                      |                       |                 |

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| <b>Work Plan Reference</b> | <b>Deliverable</b>  | <b>Plan Date from last Q</b> | <b>Date Completed or Currently Planned</b> | <b>Status</b> | <b>Comments</b> |
|----------------------------|---|------------------------------|--|---------------|-----------------|
| End of Third Quarter       | Quarterly technical report submitted by July 20, 2006; quarterly financial reports/forms submitted by Aug. 14, 2006; MCID team will travel to Washington, DC for quarterly meeting with USAID program staff | June 30, 2006                | July 20, 2006<br>Aug. 14, 2006             |               |                 |

### **C. Other Materials and Products (informal deliverables)**

As program implementation proceeds, MCID will be able to provide information relative to the following:

1. Success stories
2. Lessons learned
3. Feedback from field tests and trials
4. Sustainability plan
5. M&E Strategy Plan

### **D. Program Modifications**

As discussed in Section I, MCID rescheduled its Assessment activity as a result of communications with USAID/Washington and USAID/Lusaka. Moreover, the Assessment Team was reduced from six to three and the visit was shortened from four weeks to two weeks. Nonetheless, the project team, with the assistance of the USAID Mission and Zambia's MOE, will undertake and complete its program activities in such a manner that the beneficiaries will receive the greatest possible benefits. Further, the resulting Activity Identification Design Plan will reflect the Assessment as well as the input from the Mission, MOE, and other stakeholders.

## **III. Planned Activities for Next Reporting Period**

- Attend the Launch in Accra, Ghana – MCID's Executive Director, Ally Mack, and the President of Tougaloo College, Beverly Hogan, will travel to Ghana for the official launch of the program led by First Lady Laura Bush.
- Employ In-Country Project Manager, Coordinator and Secretary – The In-Country Project Manager's responsibilities will include the identification of candidates for the coordinator and secretary position. MCID will interview these individuals via conference calls and check references.
- Perform In-Country Assessment Review – This assessment will be carried out January 22 through February 5, 2006.
- Project Advisory Committee (PAC) established – This process will begin in January with the assistance of the Mission and MOE.
- Submission of Assessment Report – This report will be submitted by the Assessment Team within ten days following the Assessment visit.
- Develop Detailed Activity Identification Design Plan – This document is the basis of the project. It will be submitted to USAID/Washington by the end of February.
- Activity Identification Design Plan Approved
- Implement Activity Identification Design Plan – The MCID team will return to Lusaka to present the Plan to the MOE and PAC. Projected travel date is the end of March.
- Publisher Identification – MCID's In-Country staff will begin this process in February in order to be prepared to issue the bid solicitations for the actual materials in a timely manner.
- Design of Learning Material – MCID has already identified a pool of U.S. writers and editors and will begin this process in Lusaka in January. However, the final selection will be made upon approval of the Plan.

#### **IV. Problems, Issues and Solutions**

The Assessment was postponed at the request of the Mission as discussed above. This caused the dates of deliverables such as the Assessment Report and Activity Identification Plan to be changed by approximately two months. In MCID's view, this will not delay the project as a whole. Due to the delay in the Assessment, MCID has not hired the In-Country staff. All staff should be under contract by February 28, 2006.

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## ATTACHMENTS

## ***Lula Savage Collier, Ph.D.***

### **EDUCATION**

|       |      |  |   |
|-------|------|--|---|
| Ph.D. | 1979 | St. Louis University, St. Louis, MO    | Curriculum & Instruction and Research Methods |
| Cert. | 1970 | Harris Teacher College, St. Louis, MO  | Remedial Reading                              |
| M.Ed. | 1969 | St. Louis University, St. Louis, MO    | Urban Education Curriculum & Instruction      |
| B.S.  | 1961 | Lincoln University, Jefferson City, MO | Elementary Education and Social Sciences      |

### **PROFESSIONAL EXPERIENCE**

**August 11, 2003 - Present**

**Professor of Education (Tenured)  
Mississippi Valley State University  
Itta Bena, Mississippi 38941-1400**

**January 2002 - June 30, 2003**

**Vice President for Academic  
Affairs/Professor of Education  
Mississippi Valley State University  
Itta Bena, Mississippi 38941-1400**

Served as Chief Academic Officer of the University, member of Executive Staff, member of Chief Academic Officers Council of the MS Institutions for Higher Learning. Worked with students, faculty, and officers of the University to promote academically challenging programs that reflect quality and integrity. Provided overall leadership of academic programs and services of the University, participated in building University budget; prepared and negotiated budgets for academic units; developed/revised academic policies and assessment instruments; coordinated preparation of self-study reports to external accrediting and program approval entities. Identified external funding opportunities and monitored preparation of proposals for such.

**July 1, 1995 - January 7, 2002**

**Jackson State University  
Jackson, Mississippi 39217**

August 10, 2001 - January 7, 2002

Professor of Education/Graduate Faculty  
Director of Rod Paige Math/Science Academy

Accomplishments: Taught graduate course in the School of Education/Department of Education Administration; coordinated planning for the Paige Academy. Participated in writing proposal accepted by SREB to provide technical assistance to improve the JSU education administration program via leadership training and curriculum revision; participated in developing proposal to United States Office of Education which was funded at \$500,000 to plan a reading-based math-science academy via the School of Education in partnership with the Jackson Public Schools System. Directed activities of planning committee, selected staff, developed budget, scope of work and detail work plan for the one-year planning period.

July 1, 1999 - December 31, 2000

Interim Vice President for Academic Affairs  
Professor of Education/Graduate Faculty

Accomplishments: Served as Chief Academic Officer of University and advisor to the President and other executive officers on academic affairs. Provided overall leadership of academic programs of University, including long and short-range planning in light of current trends and successful practices in higher education. Built, negotiated, and monitored budgets for academic units; served on President's Administrative Cabinet; represented President at internal and external events; supervised office personnel of two Associate Vice Presidents, six office support staff; supervised eleven deans and six program directors including Director of Library Services, Director of Faculty Development. Served as liaison to MS Attorney General's Office on legal issues related to academics. Served as Ayers \* liaison between campus and Mississippi Institutions for Higher Learning (IHL); (\*Ayers vs Musgrove desegregation case was recently brought to closure.); developed format for reporting status of JSU Ayers programs to IHL and Ayers monitor; coordinated development of articulation agreements between University and three area community colleges; assisted in developing proposal for joint summer pre-pharmacy program between JSU and University of Mississippi; developed needs-assessment instrument to collect data from personnel at Corps of Engineers and the Waterways Experiment Station in Vicksburg and the City of Jackson as initial steps in delivering educational programs/services to those groups; developed revised format for academic program review; developed Annual Report for Office of Academic Affairs.

July 1, 1995 - June 30, 1999

Associate Vice President for Academic Affairs  
Professor of Education/Graduate Faculty

Accomplishments:

Associate Vice President for Academic Affairs. Served as Chief Academic Officer in absence of Vice President. Coordinated Summer School and special academic projects. Conducted academic research and compiled data for academic reports. Developed and wrote Annual Report for office. Audited and maintained academic inventory. Monitored application of policies of University and IHL System relative to hiring, promotion and tenure. Coordinated development of proposals to establish three new professional schools and eight new degree programs in response to Ayers desegregation decree. All new degree programs, the School of Allied Health Sciences, and the School of Engineering have been successfully implemented. Expanded role in developing new programs included building, presenting, and monitoring budgets; selecting consultants, deans, and other personnel; and coordinating development of Substantive Change Reports for submission to Southern Association of Colleges and Schools (SACS). Developed academic and university-wide policies. Chaired Commencement Planning Committee. Chaired Graduation Clearance Committee; developed and implemented two academic forgiveness policies, developed and implemented Dual Degree Option and Second Baccalaureate Option.

Interim Dean of the Graduate School: (FY 96-97). Served as Interim Dean of Graduate School and Chair of Graduate Council in addition to responsibilities as Associate Vice President for Academic Affairs. Developed and implemented processes and structures to improve overall quality and delivery of services. Negotiated 100% funding increase to add professional staff, increase number of stipends and monthly amount paid to recipients. Chaired Search Committee for Dean of Graduate School.

**November 1, 1991 - June 30, 1995**

**Tennessee State University**  
**Nashville, Tennessee 37209**  
Vice President for Administration  
Professor of Education

Accomplishments: Member of President's Cabinet. Served as Campus Executive Officer in absence of the President. Represented President at national, local and regional meetings. Provided administrative oversight to Directors of external relations areas, i.e., - (1) Alumni Relations, (2) Athletics, (3) Development and the TSU Foundation, (4) Public Relations, (5) Printing Services, (6) Gentry Center (athletics facility), (7) Conferences and Special Events, (8) Title III, (9) Affirmative Action and (10) Institutional Research. Represented University to Ohio Valley Conference of the NCAA and at national meetings of NCAA; member of Nashville Sports Council and NCAA Peer Review Teams. Served as liaison to TN Office of the Attorney General on legal issues related to athletics. Led university strategic planning initiative. Approved and negotiated budgets for reporting units; participated in building budget for University.

**July 1, 1990 - October 31, 1991**

**Tennessee Board of Regents (TBR)**  
**Nashville, Tennessee 37217**  
Assistant Vice Chancellor for Academic Affairs

Accomplishments: Developed and interpreted academic policies and guidelines relative to diverse missions of twenty (20) institutions. Negotiated/maintained budget for and coordinated system-wide remedial and developmental program for under-prepared students; administered staff development and special projects funds for personnel in those programs. Staffed activities aimed at enhancing desegregation in System enrollments and employment; conducted workshops, technical assistance and training sessions for System employees, k-12 teachers and parents throughout the State. Presented reports to Board of Trustees and testified before State legislative committees. Revised policies and guidelines in areas of academic freedom and responsibility, tenure and promotion. Gave first review and approval of tenure and promotion recommendations submitted to TBR by member institutions. Coordinated with TBR Legal Council issues and follow-ups related to faculty grievances of termination, tenure and promotion decisions. Chaired Education Committee of the Nashville Urban League; Chaired Minority Teacher Education Committee; participated in the development of academic studies/reports. Member of Desegregation Monitoring Committee, Advisory Council for Tennessee Pre-professional Programs, and State Department of Education Task Forces.

**1987 - 1990**

**Fayetteville State University**  
**Fayetteville, North Carolina 28301**  
Assistant Dean of School of Education  
Professor of Education/Graduate Faculty

Accomplishments: Monitored development and evaluation of instructional programs. Reviewed and approved tenure and promotion recommendations for submission to VPAA. Coordinated development of NCATE and State Department of Public Instruction (SDPI) self-study documents; co-chaired SACS Self-Study Steering Committee. Developed articulation agreements with area community colleges. Member of SDPI Technical Assistance Teams that worked with other institutions to improve teacher education programs - structure, delivery, and quality; Member of Region V Collaborative, Faculty Senate, State of NC

- 1990 Teacher of the Year Selection Committee, and other School, University, and state-wide committees.

**1986 - 1987**

**Baruch College/CUNY**

**New York, New York 10010**

Chair, Department of Compensatory Education (Academic Unit)

Director of SEEK Program (Academic Support Unit)

Associate Professor of Education

Accomplishments: Directed and evaluated activities of Department and SEEK (R/D) Program within context of policies and guidelines of College and in context of agreements with professional union. (The SEEK Program was designed to strengthen academic performance of educationally under-prepared students who resided within the boroughs. Tenure track faculty in the Department provided credit courses; counselors and other support staff in the SEEK Program provided tutoring, support classes, counseling, and administered financial aid to more than 2000 students annually.) Developed and monitored budgets. Compiled data and supporting documents for State Audit Committee. Developed proposals for submission to external agencies. Coordinated tenure and promotion within the Department; coordinated and conducted research on performance of Program students. Developed articulation agreements with two-year institutions within CUNY System. Member of NY National Urban League BEEP Advisory Committee. At University: Served on President's Advisory Council, Facilities Planning Committee, College Tenure and Promotion Committee, School of Education Tenure and Promotion Committee, and Student Appeals Committee.

**1984 - 1986**

**Harris-Stowe College**

**St. Louis, Missouri 63108**

Executive Assistant to President and Director of Staff Development Assistant Professor of Education

Accomplishments: Developed and monitored implementation of institution's policies. Represented President in his absence; served as liaison with local, state, and national education advocacy and funding agencies. Prepared and monitored budgets. Participated in preparation of rejoinders to North Central Association of Colleges and Schools. Directed Office of Staff Development funded by Danforth Foundation and wrote proposals for continuous funding of office. Supervised Director of Fund Development and Alumni Affairs and the Director of Public Affairs.

**1971 - 1984**

**Southern Illinois University at Edwardsville**

**Edwardsville, Illinois 62025**

(1971 - 1977) Office of Academic Affairs: Director of Supplemental Instructional Program and Director of Special Services Program for Disadvantaged Students.

(1977 -1984) Office of Academic Affairs: Assistant to Associate Vice President for Special Programs and Minority Affairs. Coordinated development of proposals to external agencies to fund ( \$4.5 million +) academic and academic support programs to increase enrollment, retention, and graduation of minority and educationally under-prepared youth from the University's target areas which included the Greater St. Louis Metropolitan Area ( E. St. Louis, IL, City of St. Louis, and St. Louis County). Sixteen credit and non-credit programs were offered on the main campus in Edwardsville and at the E. St. Louis Center located twenty miles away. Programs included the Katherine Dunham Dance and Theater Troupe, five TRIO programs, a state-funded childcare facility, the Experiment in Higher Education - a credit hour producing program, and several community development initiatives. Member of Illinois Committee on Black Concerns,

educational consultant and advisor to Madison County Urban League, founding member of E. St. Louis Community Foundation, and founding member of the Society of Ethnic and Special Studies.

1961 - 1970

**St. Louis Public School System**  
**St. Louis, Missouri**

Taught 2<sup>nd</sup>, 3<sup>rd</sup>, 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> graders including math, remedial reading and self contained classroom.

**RELATED CONSULTING:**

Educational Monitoring and Advisory Committee. St. Louis, Missouri (1991-1998)

Served as lead consultant for academic issues. The court-appointed Committee monitored the adherence of school systems in City of St. Louis and St. Louis County to mandates specified in the State's desegregation plan. EMAC's role was to insure that efforts of the two systems provided equal access to quality education to inner-city youths. As lead consultant, I recommended and evaluated remedial/developmental and educational enrichment activities, participated in compiling data and developing narratives for quarterly reports to presiding judge, conducted workshops for community-based advisory board, school administrators, teachers, and parents.

**INTERNATIONAL (Curriculum Workshops)**

Teacher Training Pre-service Workshops (August 2005, June 2006)

Lead a training team for MCID\* of expatriate and local trainers at four Namibian Teacher Colleges under the EQUIP 2 BES III basic education program

\*(The Mississippi Consortium for International Development (**MCID** is a Consortium comprised of Jackson State University, Alcorn State University, Mississippi Valley State University, and Tougaloo College.)

Infusing African Studies into the Curriculum (November 2003)

Participated in one-day workshop sponsored by the Delta Research and Cultural Institute, division of International Programs at Mississippi Valley State University.

Afro-Cuban Folklore (October 2003)

Participated in two-day workshop sponsored by the Delta Research and Cultural Institute, division of International Programs at Mississippi Valley State University.

Internationalizing the Curriculum (May 2002)

Participated in two-day workshop sponsored by the Delta Research and Cultural Institute, division of International Programs at Mississippi Valley State University.

Internationalizing the Curriculum (1996, 1997)

Conducted workshop during week of International Week celebration sponsored by the Office of International Programs at Jackson State University, MS.

## **Other International Consulting Positions**

### Textbook and Learning Materials Assessment (January 2006)

Participated in a national assessment in Zambia under MCID's TLM Program.

### Teacher Training Assessment (February 2006)

Participated in a mid-term assessment in Namibia of the BES III Program under the EQUIP 2 IQC held by AED.

### University of Mosul, Iraq (Spring 2005)

Lead the evaluation of a two-year partnership between the University of Mosul and Jackson State University.

### American Councils for International Education Kiev, Ukraine (August 6-14, 2004)

Served as curriculum consultant and recruiter. Presented orientation workshops to Ukrainian k-12 teachers who will come to USA campuses to develop curriculum in social science and civic education in cooperation with counterparts in US schools.

### Agostinho Nieto University (ANU). Luanda, Angola (2001)

Served as MCID evaluator and academic consultant with focus on - (1) curriculum development and evaluation, and faculty development, (2) identifying suitable sites from among US member institutions to train political scientists and public administrators via faculty exchange and/or enrollment in graduate programs; (3) conducting workshops on grantsmanship and proposal writing; and (4) facilitating the internationalization of U.S. partner institutions via student and faculty exchanges.

### University of Zululand (UZ). Empangeni, South Africa (2001)

Served as **MCID** evaluator and academic consultant. Assessed status of UZ academic and support programs and personnel relative to addressing requirements and mandates contained in the new *South Africa National Plan for Higher Education*. Focused on (1) strengthening UZ's institutional capacity in areas of program/curriculum development, management and administration; (2) enhancing UZ's capacity to redesign its academic programs in selected disciplines (Chemistry, Agriculture, Consumer Science, Business, and Social Work) and (3) assisting UZ in strengthening all departments and areas of administration, thereby, making it a competitive University in today's South Africa.

### Rivers State Speaker's Assembly. Port Harcourt, Nigeria (2000)

Served as MCID consultant and advisor to Speaker of the Assembly and members in their efforts to promote democracy in that part of the world. Coordinated student exchange and development of mission-specific workshops that took place in US and locations in Rivers State of Nigeria.

### United Nations Educational, Scientific, and Cultural Organization (UNESCO). Paris, France.

((1998) International Conference on Women in Higher Education. (Invited as special guest of UNESCO)

University Nationale, San Jose, Costa Rica. (1997) Served as MCID evaluator and academic consultant for student and faculty exchange programs.

## **Study at Other Universities/Educational Agencies**

University of Vermont. Burlington, VT (2001, 2002)

Annual Conference on Legal Issues in Higher Education. Three and a half days of updates and discussions on the myriad of legal issues faced by higher education institutions. Sessions covered issues in the areas of student affairs, academic affairs, and administration.

Annual Conference of Mississippi Association of Colleges and the MS Institutions for Higher Learning (Every October from 1995 to 2002) Two-day conference designed to present higher education personnel with forums and seminars that address current issues and innovations in higher education.

The Southwest Center for Human Relations Studies. University of Oklahoma at Norman. Norman, Oklahoma (1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000) Certificates awarded in recognition of contributions to National Conference on Race and Ethnicity in American Higher Education.

Arkansas Technological University. Russellville, AR (1995) CEUs earned for participation in Higher Education and Total Quality Management: A Working Conference.®

Atlanta University Center. Atlanta, GA (1988) Certificate awarded for participation in the Executive Training Seminar for Higher Education Administrators.

Brandeis University. Waltham, MA (1987) Certificate awarded in recognition of contributions to workshop on Youth Education and Workforce Development Policies.

Carnegie-Mellon University. Pittsburgh, PA (1979) Certificate awarded upon completion of The College Management Program.

Southern Illinois University at Edwardsville. Edwardsville, IL (1970) Post-master's fellowship to conduct research in curriculum development and educational administration. One of eighteen (18) educators chosen from nation-wide competition to participate in year-long New Exploratory Teacher Education Training Program (NEXTEP). Worked with school systems in Greater St. Louis Metropolitan Area to develop and pilot innovative methods of teaching based on variations of values-clarification models.

### **Additional Professional Preparation**

National Council for the Accreditation of Teacher Education. Washington, D. C. (2001) Four days of workshops and training on new performance-based standards for accreditation of teacher education programs.

NCAA Athletics Peer Certification Training. **Indianapolis, IN (1998)** Review of revised athletics certification guidelines. **Baltimore, MD (1995)** In-depth training on gender-equity issues in athletics. **Dallas, TX (1995)** Intensive training in all areas of certification assessment; this is required preparation for persons selected to serve on certification teams; intensive training for senior women athletics administrators on the requirements of Title IX.

Total Quality Management (TQM). ( 1993, 1994, 1995) Nashville Area Chamber of Commerce, Association for Quality Participation and Control American Society for Quality Control. Certificate received for completion of eighteen clock hours of training.

Student Loan Default Rates. (1993) National Association of College and University Business Officers, Professional Development. Spelman College. Atlanta, GA Certificate received for completion of seminar on Student Loan Default Reduction: Management Strategy and Action.

Institutional Planning and Research. (1991, 1992) National Center for Higher Education Management Systems. Boulder, CO Certificate received for completion of workshop on Developing a Student-Tracking Database@ Certificate received for completion of workshop on Comparative Data for Planning and Research.

Accreditation. (1988-1990) State Department of Public Instruction. Raleigh, NC Certificate for completion of training in K-12 Program Approval Process; symposia to train coordinators of NCATE Self-Study.

Academic Administration. (1987) American Council on Education. Washington, D.C. Certificate awarded for completion of symposium on Chairing the Academic Department.

### **SELECTED PROFESSIONAL PRESENTATIONS**

Academic Accreditation. - National Association for Equal Opportunity (NAFEO) Peer Seminar meeting. Palm Beach, Florida. July 2003

TRIO Programs and Accountability. - Annual NAFEO Conference. Washington, DC (2003)

Section Chair. Preparing Liberal Arts Majors for the Global Market Place.@ Southern Regional Meeting of the College Board. Charlotte, NC (2001)

Programming for Under-prepared Students.- Annual Conference of National Association for Developmental Education. Nashville, TN (1994)

Section Chair. Race and Gender.- Southern Humanities Council Conference. Chattanooga, TN (1992)

Section Chair. Black Female Administrators in Higher Education: Opportunities and Challenges.- Annual Regents Conference. Nashville, TN (1991)

Update on Remedial and Developmental Programming- TN College Assoc. Vanderbilt University. Nashville, TN (1991)

Parental Involvement: Improving academic performance and attendance of high-risk elementary school students.- School of Education 4<sup>th</sup> Annual Educational Forum. Fayetteville State University. Fayetteville, NC (1990)

Sexually active, Black, female teenagers: A population at risk.- Annual Conference of the Assoc. of Social and Behavioral Scientists. Tallahassee, FL (1989)

Using values clarification techniques to motivate underachieving high school students.- Westover High School. Fayetteville, NC (1989)

The status of minorities in the professions.- Educational Conference of Black and Puerto Rican Legislative Caucus. Albany, NY (1988)

### **PROFESSIONAL AFFILIATIONS**

American Association for Higher Education  
American Council on Education/NNWHE  
Kappa Delta Pi National Urban League

National Association for Equal Opportunity  
NAFEO, Co-chair Steering Committee-Chief Academic Officers  
NCAA Athletics Peer Review Team  
SACS Visiting Team, Academic Affairs Consultant

American Association of University of Women  
The College Board Southern Regional Council  
Mississippi Association of Colleges and  
Schools  
National Education Association  
Society of Ethnic and Special Studies

ZAMBIA ASSESSMENT  
ITINERARY

|                                |  |
|--------------------------------|--|
| <b>Arrival-Departure Dates</b> | January 28 – February 6  |
| <b>Traveler</b>                | Philani Danette Jones Vilakazi; Gayla Cook-Mohajane                            |
| <b>Travel Destinations</b>     |  |
| <b>AEI Activities to Visit</b> | AGSP; TT; TLMP; IA (3)   |
| <b>USG Contacts</b>            | Fredrick (Rick) Henning & Cornelius Chipoma                                    |
| <b>Planning Stage</b>          | All dates not yet confirmed.<br>Coordination with various partners in progress |

**TENTATIVE SCHEDULE**

|                      |  |
|----------------------|--|
| Sunday January 28    | Arrival  |
| Monday January 29    | <p>Meet with USAID Officials<br/>Discuss TLMP, Teacher Training, AGSP, IA Activities</p> <p>Contact Persons: Fredrick Henning Cornelius Chipoma<br/>351 Independence Avenue<br/>Tel: 260-1-254-303<br/>Email: <a href="mailto:fhennig@usaid.gov">fhennig@usaid.gov</a>; <a href="mailto:cchipoma@usaid.gov">cchipoma@usaid.gov</a></p> <p>Meet with Play Pump Coordinators</p> <p>Meet with TLMP Project Coordinators (2)<br/>Meet with AGSP Partner, FAWEZA</p> |
| Tuesday January 30   | <p>Meet with Teacher Training/Innovative Activities Partners</p> <p>Education Development Center (QUESTT)<br/>Discuss Teacher Training and Community Radio Program</p> <p>American Institutes for Research (CHANGES II)<br/>Discuss Teacher Training and Book Donation</p>   |
| Wednesday January 31 | <p>Teacher Training Site Visit<br/>Meet with Trainers, Trainees, other Beneficiaries</p>   |
| Thursday February 1  | <p>Travel to XXX</p> <p>Visit AGSP Sites<br/>Focus group of selection committee members<br/>Focus group of scholars<br/>Focus group of parents<br/>Focus group of teachers/school officials</p>  |

Focus group of mentors (if different from groups above)

- Friday February 2    Travel to XXX
- Visit AGSP Sites
  - Focus group of selection committee members
  - Focus group of scholars
  - Focus group of parents
  - Focus group of teachers/school officials
  - Focus group of mentors (if different from groups above)
- Monday February 5    Meet with TLMP partners
- Focus group with Zambia Technical Team
  - Meet with officials from the Ministry of Education (MOE)/PAC
  - (Additional meetings as identified by Vivian at MCID, forthcoming)
  - Debrief with USAID
- Tuesday February 6    Depart

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| PERFORMANCE INDICATOR<br>Performance Indicator (What is being measured)  | DATA ACQUISITION   |   | FINDINGS/RESULTS |             | Additional Comments   |
|--|--|---|------------------|-------------|---|
|  | Data Source<br>(Document, database and/or informant)   | Method of Data Collection<br>(How data are collected)   | Quantitative     | Qualitative |   |
| (Directly from PMP)  | (Actual vs. planned)   | (Actual vs. planned)  | (Finding)        | (Finding)   | (Any comments needed to clarify findings)   |
| <b>Awardee Sub Intermediate Result 1.1: Developed high quality learning materials</b>  |  |   |                  |             |   |
| (Required) TLM standards of quality developed jointly with MOE and PAC (at a minimum standards should include age appropriateness, durability, and contextual relevance) | Docs: MOU, Work Plan, Needs Assessment, Zambian Standards, Documentation of communication, PMP; Informants: MOE reps, MCID team  | Discussions during Needs Assessment Visit; Dialogue and communication regarding quality standards and PMP quality indicators  |                  |             | This process will begin in May with the drafting of the TLM; writers workshop in US addressed this issue thoroughly, as will the writers workshop in June in Zambia   |
| (Required) TLM prototypes have been vetted, revised, and approved by PAC, MOE, Awardee, and educators  | Prototypes, work plan, MOUs, any correspondence related to prototypes Informants: PAC, Educators (US and Zambian including classroom teachers), MOE, textbook approval team  | Develop and agree on the process with MOE and partners - process for vetting effort (read through once and revise or several read through?) In-country visits, revision and approval process; Multiple places - Approval process chain, per grant agreement |                  |             | Not yet at this stage; discussions with CDC and Mission will begin with Dr. Taylor's visit in April.  |
| (Required) The TLM is aligned with the national curriculum   | Approved Standards of Zambia and Cubiculum Guide, Communication between MCID and MOE, MOU Informants: CDC/MOE, Permanent Secretary at MOE, Standards Officer of MOE, Mission | Needs Assessment Data, discussions about National Curriculum.   |                  |             | MCID is in daily contact with CDC key staff; writers in the US have read the assessment report and other key project documents; waiting to received the national curriculum from MOE. The TLMs proposed are in line with the MOE's strategy.  |
| (Illustrative) TLM includes the cross-cutting theme of HIV/AIDS  | The content of the TLM for age and content appropriateness Informant: PAC, MOE, CDC, USAID Zambia, consult with Ministry of Health HIV/AIDS advisors; Health NGOs in Zambia  | Input from the curriculum Sample TLM. Comparison with other MOE materials, consultations  |                  |             | All TLMs will address this issue in some form, however the Revised edition of the Mathematics of HIV/AIDS will support the numeracy core and sensitize teachers and students to this issue. The Gender Literacy as well as the teacher training will also address and integrate HIV/AIDS. This subject will be addressed with sensitivity in honest terms. As the MOE has final approval, the MCID Team will work closely with them in terms of what level they are comfortable with and what level would be acceptable to the project. |
| (Illustrative) TLM includes the cross-cutting theme of Gender Equity   | The content of the TLM for gender specific, age and content appropriateness Informant: PAC, MOE, CDC, USAID Zambia   | Input from the curriculum Sample TLM. Comparison with other MOE materials.  |                  |             | All TLMs will address gender equity in a Zambian context.   |

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|---|---|---|------------------|-------------|---|
|   | Data Source<br>(Document, database and/or informant)  | Method of Data Collection<br>(How data are collected)   | Quantitative     | Qualitative |   |
| (Illustrative) TLM reflects cultural sensitivity including the appropriate translation or use of language   | Specific multi-cultural themes, concepts, ideals represented in the content of TLM. Informant: PAC, MOE, CDC, USAID Zambia, Editor in Chief | Input from the curriculum Sample TLM. Comparison with other MOE materials.  |                  |             | The TLMs will be in English - by 4th grade the students do read, speak and write in English. All writers will write with British English, and the Editor in Chief will be responsible for confirming the language used is appropriate. MCID recognizes that there may be differences in terminology even between British English and "Zambian" English. But determinations may also have to be made as to teaching "correct" English, i.e. slang terms, local terminology for modern technology, etc. |
| (Illustrative) TLM includes technology based materials  | CD/DVD cassettes and content. Informant: PAC, MOE, CDC, USAID Zambia  | Input from the curriculum Sample TLM. Comparison with other MOE materials.  |                  |             | All TLMs will be distributed on CDs (possible DVDs). Copyrights will allow for this distribution and reproduction.  |
| (Illustrative) TLM integrates life skills   | The content of the TLM for coverage/infusion of life skills. Informant: PAC, MOE, CDC, USAID Zambia   | input from the curriculum Sample TLM. Comparison with other MOE materials.  |                  |             | The MCID Team, PAC and MOE will first decide on life skills to address. This will be done in May. However, numeracy is a priority in Zambia - the TLMs will relate this to home finances and finances, purchasing, inventory and other small business skills.   |
| <b>Awardee Sub Intermediate Result 1.2: Successfully produced and distributed learning materials to intended recipients</b>   |   |   |                  |             |   |
| (Required) The Roadmap to Publication includes a clear production and distribution strategy as developed with the MOE and PAC (Roadmap - this can be a simple and short document provided to CTO - defined at conference in notebook - essentially the same as the PMP narrative handout) | MOU, Distribution plan - existing distribution strategy, annual work plan, Activity Design,   | Review of all data sources by technical, administered Team, PAC   |                  |             | The MOE has requested MCID work closely with them in this area. MCID will provide any technical guidance necessary on developing the distribution plan. In addition, MCID has taken on the responsibility of soliciting contributions from industry, companies, and any other possible donors.  |
| (Required) Number of TLM produced   | Docs: Printing orders and invoices, delivery confirmations to MOE; Informants: Printing Company, PAC members                                | Collection and review of publication orders against invoices and delivery confirmations; direct exchange with MOE (telephonic, in-person, electronic) |                  |             | MCID will publish the minimum of 600,000 TLMs but a determination will be made after the drafts as to whether the budget can support more and exactly what constitutes a TLM, i.e. one integrated Foundation of Learning Kit - or each component? The Core Components as one TLM or each part of the Core (math. and Rainbow kit, workbook and CD)?   |

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|--|--|--|------------------|-------------|--|
|  | Data Source<br>(Document, database and/or informant)   | Method of Data Collection<br>(How data are collected)  | Quantitative     | Qualitative |  |
| (Required) Number of TLM distributed per school  | MOE distribution plan, receipts, Informants: MOE, Transportation companies; Review of weigh bills, calls, signed invoice, site visits,   | Review and tracking of TLMs distributed, delivery schedules, signed invoices, and site visitations   |                  |             | These numbers must correspond to the number produced and received by the MOE prior to distribution. MCID and USAID also do not want to see these TLMs sitting in locked closets and will be aware of actual use in the classroom.                            |
| (Required) Number of pupils with access to TLM   | Log to determine where TLMs are located and the number of pupils with access to that location. How many children are in a classroom that has a certain number of TLMs. A tracking document must be created. Relying on MOE for statistics of number of pupils in schools. They may have formulas they use now. | Collect and review of MOE data, assessment report,   |                  |             | MCID is also interested in how many share each workbook and if the students are allowed to take it home.   |
| (Illustrative) Number of teachers with access to TLM   | Log to determine where TLMs are located and the number of pre-service and in-service teachers with access to TLM. Informant: MOE/CDC Procurement and Distribution Committee  | Use of systematic tracking system/instrument for data collection following the procurement and distribution process  |                  |             | MCID is interested in if the teachers are issued the guides for the year or must request access on occasion.   |
| <b>Awardee Sub Intermediate Result 1.3: Designed cost-effective learning materials</b>                     |  |  |                  |             |  |
| (Required) Expenditure and budget tracking system has been developed and disaggregated by each type of TLM | Budget, budget tracking system, actual final cost of each TLM based on the accepted bids, will have to decide how many of each item will be produced -Informants: Budget Manager, Publishing Rep   | Through the bidding process, updated budget (weekly) through Team meetings (PAC and in-country partners)   |                  |             | MCID's financial manager will develop a spread sheet to show cost per Component, per total TLM and per unit. (This cost will later be broken down by student and teacher.)   |
| (Required) TLM is designed to be affordable for MOEs to reproduce or adapt in the future                   | Docs: Previous years' MOE budget, Awardee expenditures; Informants: PAC members, MOE reps, Awardees  | Collection and review of MOE budget against Awardee expenditures; direct exchange with MOE staff and publication companies (telephonic, in-person, electronic) |                  |             | MCID is in the process of meeting printers and in consultation with CDC and the procurement staff and the MOE on these issues. This will be a consideration in the bid process. Durability and affordability must be integrated to an acceptable compromise. |

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|--|--|---|------------------|-------------|---|
|  | Data Source<br>(Document, database and/or informant)   | Method of Data Collection<br>(How data are collected)   | Quantitative     | Qualitative |   |
| (Required) Best-value publisher was identified through a competitive process   | Solicitation, Competitive Bids from publisher, samples, USAID procurement policy , Informant: MOE Procurement Officer  | Collection and reviewing documents  |                  |             | MCID is in the process of meeting printers/publishers. A bid package will be developed following the draft TLM. MCID will send the package to known printers in Zambia and post the bid for fair competition. The PAC will review the bids in consultation with the MOE and the Mission. All members of the MCID staff will be involved in this process.        |
| (Illustrative) Developed cost share tracking forms for all partners  | Documentation on MCID standard forms   | Statements, copies of invoices  |                  |             | MCID has standard cost share documentation forms.   |
| (Illustrative) In-country partners use TLMP to leverage funds  | Record of donor contributions, letters of solicitation and pledges, financial statements   | Identify and list funding sources or related matching resources   |                  |             | MCID staff are currently developing lists of private companies and other donors to approach for donations and contributions. One focus area is the distribution of the TLMs. The MOE is severely under budgeted but has almost no ability to distribute books. MCID's In-country Manager will market this project aggressively to a large variety of companies. |
| <b>Awardee Sub Intermediate Result 1.4: Incorporated the intended utilization of learning materials into project design</b>                        |  |   |                  |             |   |
| (Required) A vision statement that describes pupil and teacher use of the TLM is developed jointly by PAC, MOE, and Awardee                        | RFA, MOU, Technical proposal, quarterly reports, annual reports, Activity design, work plan, PAC meeting minutes, assessment report                          | Review and sharing of documents   |                  |             | The PAC will draft this statement at the first meeting (May/June)   |
| (Required) Utilization assessment study is completed and includes feedback from a sample of teachers and students on utilization and effectiveness | Surveys, questionnaires, focus groups, observations of classroom use/enthusiasm over use; train evaluators from MOE to do this                               | Survey, and interviews with teachers, students as well as administrators and other stakeholders. Also informal classroom observations will be used. |                  |             | TBD   |
| (Illustrative) Number of educators trained to use TLM  | Docs: Documents, reports, and receipts from trainings, surveys of teachers and school admin.; Informants: MOE, Awardees, educators and school administrators | Collection and review of reports, receipts, and documents from the trainings (or intended trainings)  |                  |             | TBD -- Training is key to the TLMP. MCID will develop a comprehensive training program. MOE and other key individuals will be trained as trainers.  |

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|---|---|--|------------------|-------------|--|
|   | Data Source<br>(Document, database and/or informant)  | Method of Data Collection<br>(How data are collected)  | Quantitative     | Qualitative |  |
| (Illustrative) Number of pre-service teachers trained to use TLM  | TLMP Professional development training roster provided by teacher training college and program coordinator  | Survey teacher education programs to recruit participants for TLM training who will respond to questionnaires related to the training and use of TLM |                  |             | TBD  |
| (Illustrative) Buy-in by teachers and administrators confirmed  | Focus groups, documents supporting TLM, i.e. policy statements, and minutes of meetings held by stakeholder groups                                      | Teacher and administrator survey, interview and questionnaire feedback data  |                  |             | TBD  |
| <b>Awardee Sub Intermediate Result 2.1: Established functional operative partnerships</b>   |   |  |                  |             |  |
| (Required) Identified appropriate members of the PAC and put a communication strategy and knowledge sharing system in place Members of PAC demonstrate that they are adequately informed about project's progress | Docs: Country Assessment, TLMP proposal; website, emails; newsletters; PAC minutes; Informants: PAC members, MOE, Awardees                              | Communication with MOE and PAC members; meeting notes; surveys administered to PAC members, emails   |                  |             | The MOE, MCID and USAID identified candidates for the PAC and the MOE will confirm all candidates. MCID will announce the members and present bios to USAID Washington as soon as the MOE confirms. A formal communication flow will be designed, preferably electronic. |
| (Required) Effective division of roles and responsibilities are evident in the MOU and Job descriptions and Scopes of work  | MOU, Job Descriptions, PMP, Work plan, Consultant Scope of work   | Communication with MOE and PAC members; meeting notes; surveys administered to PAC members, team members, team members, emails                       |                  |             | The MOU has been circulated for two months with revisions on all areas. This negotiation process will be complete in early April and all parties will sign by the first week of May.   |
| (Illustrative) Establishments of collaborative partnerships beyond TLMP   | Formal or informal agreements (MOUs) between partners, evidence of collaboration, success stories, leveraged funds                                      | Follow-up reports of collaborative involvements for sustainability after the funding cycle.  |                  |             | partnerships will be developed with private companies to contribute to the project; local NGOs will also benefit from trainings  |
| <b>Awardee Sub Intermediate Result 2.2: Built institutional capacity</b>  |   |  |                  |             |  |
| (Required) Strategy for strengthening each institution (Awardee and African) developed and is aligned with country and organizational assessment findings   | Docs: Work Plan, Roadmap, or MOU; narrative, discussions and memos on needs from MOE; Informants: PAC members, MOE reps, Awardee reps, University Reps, | Review of Work Plan, Roadmap or MOU for strategic elements relating to institutional capacity  |                  |             | The Assessment report addressed areas of capacity building. MCID has identified US team members to assist in the process and will continue to identify Zambians to assist including at the Universities.   |

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|---|--|--|------------------|-------------|--|
|   | Data Source<br>(Document, database and/or informant)   | Method of Data Collection<br>(How data are collected)  | Quantitative     | Qualitative |  |
| (Required) Awardee and African institutions demonstrate areas of increased capacity (i.e. financial management, textbook design, etc.) as a result of project | Docs: Surveys of teachers, writers, publishers and students, and annual reports. Informants: PAC, MOE reps, Mission reps, teachers and students. | Implements post assessments of capacity of African institutions using surveys, interviews, as well as an examination of textbook designs and management systems. |                  |             | The Assessment report addressed areas of capacity building. MCID has identified US team members to assist in the process and will continue to identify Zambians to assist including at the Universities. |
| (Required) Awardees and African institutions apply new skills   | Docs: Questionnaires, surveys, quarterly reports. Informants:  | Survey, and interview faculty and administrators to determine new skills application. Also informal observations will be used.                                   |                  |             | TBD  |
| (Illustrative) Use of innovation and technology to increase efficiency of textbook delivery or collaborative process  | Docs: Quarterly reports, log of emails, telephone statements. Informants: Writers, consultants, Partner representatives.                         | Interview, surveys and informal observations will support data collection.   |                  |             | TBD - related to capacity of MOE as well as districts and individual schools.  |
| (Illustrative) Use of innovation and technology to increase capacity in training, communication and management  | Docs: Documents, reports, surveys of teachers and school admin.; Informants: MOE, Awardees, and writers.   | Questionnaires, surveys and informal observation will used to collect data.  |                  |             | TBD - related to capacity of MOE as well as districts and individual schools.  |