CLASSIFICATION

# PROJECT EVALUATION SUMMARY (PES) — PART I

Report Symbol U-447

| 1. PROJECT TITLE | 2. PROJECT NUMBER | 3. MISSION/AID/W OFFICE |
|---|---|---|
| CARIBBEAN EDUCATION DEVELOPMENT: UWI/USAID PRIMARY CURRICULUM SUBPROJECT | 538-0029 | RDO/Caribbean |

4. EVALUATION NUMBER (Enter the number maintained by the reporting unit e.g., Country or AID/W Administrative Code, Fiscal Year, Serial No. beginning with No. 1 each FY) 538-83-03

☒ REGULAR EVALUATION ☐ SPECIAL EVALUATION

| 5. KEY PROJECT IMPLEMENTATION DATES | 6. ESTIMATED PROJECT FUNDING | 7. PERIOD COVERED BY EVALUATION |
|---|---|---|
| A. First PRO-AG or Equivalent FY 79<br>B. Final Obligation Expected FY 84<br>C. Final Input Delivery FY 84 | A. Total $ 4,253,790<br>B. U.S. $ 3,795,990 | From (month/yr.) July 1981<br>To (month/yr.) June 1982<br>Date of Evaluation Review May 17 - June 12, 1982 |

8. ACTION DECISIONS APPROVED BY MISSION OR AID/W OFFICE DIRECTOR

| A. List decisions and/or unresolved issues; cite those items needing further study. (NOTE: Mission decisions which anticipate AID/W or regional office action should specify type of document, e.g., airgram, SPAR, PIO, which will present detailed request.) | B. NAME OF OFFICER RESPONSIBLE FOR ACTION | C. DATE ACTION TO BE COMPLETED |
|---|---|---|
| 1. Complete the proposals for regional activities in Educational Planning. | RDO/C and UWI | Mar. 83 |
| 2. Fill the vacant position of Project Evaluation Specialist. | UWI | Dec. 82 |
| 3. Utilize the app. US$30,000 made available by the University for the purpose of recruiting one additional Project staff member. | UWI | Mar. 83 |
| 4. Procure short-term technical assistance to facilitate: (a) the preparation of graded readers in Language Arts; (b) the completion of the plan for the dissemination of Project materials beyond pilot schools. | RDO/C and UWI | Mar. 83 |
| 5. Collect data to show pupil achievement in Project classes. | UWI | Mar. 84 |
| 6. Train teachers, principals and subject leaders in evaluation procedures. | UWI | Mar. 84 |
| 7. Seek a workable solution for the payment to UWI Project staff of per diems that do not exceed USAID's maximum per diem rates and at the same time do not violate UWI's procedures and regulations. | RDO/C and UWI | Mar. 83 |

9. INVENTORY OF DOCUMENTS TO BE REVISED PER ABOVE DECISIONS

- ☐ Project Paper
- ☐ Financial Plan
- ☐ Logical Framework
- ☐ Project Agreement
- ☐ Implementation Plan e.g., CPI Network
- ☐ PIO/T
- ☐ PIO/C
- ☐ PIO/P
- ☐ Other (Specify) _____
- ☐ Other (Specify) _____

10. ALTERNATIVE DECISIONS ON FUTURE OF PROJECT

- A. ☒ Continue Project Without Change
- B. ☐ Change Project Design and/or ☐ Change Implementation Plan
- C. ☐ Discontinue Project

11. PROJECT OFFICER AND HOST COUNTRY OR OTHER RANKING PARTICIPANTS AS APPROPRIATE (Names and Titles)

Dr. Harold Freeman - Hum. Res. Dev. Officer
Dr. Nicholas O. Frederick - Sen. Edu. & Hum. Res. Dev. Off.
Prof. Aubrey Phillips - Dean, UWI, Sch. of Edu., Jamaica
Dr. Desmond Broomes - Vice-Dean, Scho. of Edu., Barbados
Dr. Leonard Shorey - Project Coordinator
RDO/C- C/CDO:DBoyd; PRM:TLiancke; A/DIR:AMorse;SPS:DEClarke

12. Mission/AID/W Office Director Approval

Signature: [signature] for

Typed Name: William B. Wheeler, Director (AID)

Date: 1/6/83

AID 1330-15 (3-78)

## PROJECT EVALUATION SUMMARY (PES) - PART II

### 13. SUMMARY

This is a report on the second interim evaluation of the Caribbean Education Project. The first was conducted in June 1981 at the end of the second year of the Project and the second was completed in June 1982 at the end of the third year. The major emphasis in this report is therefore to evaluate project implementation since the last evaluation - that is, during the third year of the project.

The Caribbean Education Development Project comprises three subprojects: the Primary Curriculum Subproject executed by the University of the West Indies (UWI); the Secondary Curriculum Development Subproject implemented by the Caribbean Examinations Council (CXC); and the Primary School Construction and Rehabilitation Subproject whose executing agency is the Caribbean Development Bank (CDB).

The Caribbean Education Development Project seeks to enable the human resources of the Caribbean to achieve their full potential through the improvement of the learning environment for the primary and upper secondary age groups.

The Primary Curriculum Subproject (hereinafter referred to as the Project) attempts to improve the learning environment of the primary school age group (7-11), by means of improved curricular units, materials and related teacher training as well as to enable the UWI to expand and extend its assistance to the territories in improving their educational systems.

The Project is being actively implemented and the following outcomes were noted during the year following the previous evaluation:

a) During the year new curricula were developed in 4 subject areas, for age groups 9-10 years, in 5 pilot schools per territory, in each of 9 territories, as a result of 2 Regional Workshops, 18 Territorial Workshops and about 95 Local Workshops. During the three-year period, therefore, new curricula have been developed in 4 subject areas, for age groups 7-8 years, 8-9 years and 9-10 years in 5 pilot schools per territory, in each of 9 territories, as a result of 4 Regional Workshops, 36 Territorial Workshops and about 140 Local Workshops.

b) During the year a total of 205 headteachers and supervisors from 10 territories acquired additional skills to support the curriculum innovations as result of 10 territorial workshops which have been executed. Most of them had attended previous workshops organized under the Project. This brings the totals during the three-year period to about 255 headteachers and supervisors being trained through 20 workshops.

c) No additional training took place in educational planning although plans are being formulated for expanded activity. The total number of people who have been trained remains at 18 persons from 10 territories.

d) There has been a continued expansion of UWI services to the territories. To date approximately thirteen (13) members of the UWI School of Education Staff have served as resource persons at Project regional and territorial workshops.

Two major problems were encountered, as follows:

a) There is still a backlog of baseline data that has not yet been analyzed for the purposes of the internal evaluation of the Project;

b) While efforts are being made to measure student performance on segments (units) of instructional materials developed under the project, there is still a need to arrive at ways of assessing student achievement resulting from the total Project activity.

The Team, appointed to conduct the second independent evaluation of the Project, determined on the basis of a questionnaire mailed to Chief Education Officers (CEO's), that the Project was having strong or very strong impact on the five pilot schools in their respective territories. All CEO's scored the development of instructional materials as the Project component ranking first or second in terms of impact, the training of teachers and dissemination of materials as second or third, followed by the provision of consultative help and training of administrators.

The Team made the following concluding statements on the accomplishment of the Project.

> "In closing, the team conveys plaudits for the exceptional accomplishments of the Project administration, the outstanding quality of leadership throughout the Project, the excellent curriculum materials produced, and the notable spirit of perseverance and dedication prevailing among Project implementers throughout the territories. The team is confident that US-AID will find in 1984 that the investment has produced significant impact far exceeding expectations held in the original proposal.
>
> The team made similar comments in the concluding paragraph of the 1981 report. This year we began by questioning our findings in that report. We end by validating them with even more confidence than we had last year." (p.46)

14. EVALUATION METHODOLOGY

The Project Paper required the preparation of a comprehensive Evaluation Plan during the first year of the project. It also called for three formal evaluations by a panel of AID funded evaluators. The first evaluation would be conducted in 1981 at the end of Project Year 2, the second at the end of Project Year 4 in 1983, and the terminal evaluation at the end of Project Year 5 in 1984.

As reported in the previous PES, the Evaluation Plan was prepared in May 1980. Also, the first formal evaluation was conducted in June 1981 by a three-person team and, on the basis of the evaluation report, a PES was drafted. The team (whose composition is given below) recommended in its report that the second formal evaluation be advanced one year - that is, in 1982 at the end of Project Year 3. This would have the advantage of permitting the evaluators to point out possible implementation problems early enough for correction during the remaining project life. The recommendation was accepted.

It was felt by both UWI and USAID that this second evaluation would be more thoroughly and expeditiously done by the same team members on account of the familiarity which they had acquired with the area. Accordingly, in consultation with ICET (the International Council on Teacher Education), the same persons were recruited as follows:

(a) Dr. Karl Massanari, formerly Associate Director of the American Association of Colleges for Teacher Education (AACTE) and Director of the ERIC Clearinghouse on Teacher Education, Washington, D.C.; now Consultant to the College of Education, University of Florida;

(b) Dr. Joanne Rand Whitmore (Assistant Dean for Teacher Education, College of Education, Kent State University, Kent, Ohio);

(c) Dr. Cordell Wynn (formerly Dean, School of Education, Alabama A and M University; now President of Stillman College, Tuscaloosa, Alabama.)

During its three-week assignment, from May 17 to June 12, 1982 the team formulated its evaluative judgements on the basis of a comprehensive scope of activities including:

1. conducting interviews with 20 territorial Ministry of Education personnel;

2. conducting interviews with all 10 of the Project Implement Officers (PIOs);

3. visiting 31 of the 50 Project schools;

4. visiting all 10 of the participating territories;

5. interviewing 33 Project School principals and 106 teachers;

6. interviewing 38 territorial Subject Leaders;

7. visiting/observing 94 classes in Project schools;

8. attending four Project Implementation Unit (PIU) meetings and one territorial workshop;

9. conducting interviews with UWI faculty - six at Mona, and 11 at Cave Hill;

10. conducting interviews with the five primary Project staff members;

11. interviewing two USAID officers;

12. examining numerous Project reports submitted by Project staff, PIOs and consultants;

13. examining available data summaries and analyses;

14. integrating findings, summarizing observations, and formulating evaluative judgements.

The amount expended for the present evaluation exercise was about US$16,000, thereby bringing the total cost of evaluation for the Project to about US$32,000. There was provision for this in the Project budget.

15. EXTERNAL FACTORS

During the course of the year there were no new changes in host government priorities affecting participation in the Project.

The status of Grenada remains more or less the same as reported in the last PES - namely, it has given no commitment to participating in the Project.

Nevertheless, additional territories opted to make use of materials produced by the Project (see Section 20).

16. INPUTS

| INPUTS EXPECTED DURING LOP | INTERIM EVALUATION COMMENTS |
|---|---|
| 1. Technical Assistance | |
| a) 52 months short-term consultants, costing $217,000. | Approximately 12 months of short-term consultancy was used during the year amounting to about $45,000. This brings the total employed in the Project to 16 months of consultancy amounting to about $60,000. |
| b) UWI visits to territories, costing $263,769. | Approximately $60,000 was spent on visits to the territories by UWI staff during the year. This brings the total spent to date to approximately $120,000. |
| c) 11 UWI AID-funded staff, costing $951,192. | There was a decrease by one (1) staff member during the latter part of the year due to the demise of the Evaluation Officer. The staff now stands at 10 UWI AID-funded persons, with the 11th. position, that of Graphic Artist, being filled on a part-time, seasonal basis. Staffing costs during the year amounted to about $154,000 bringing the total spent to date to about $324,000. |
| d) External Evaluation, costing $34,500. Provision has been made for three (3) external evaluations. | One additional external evaluation was conducted during the year, costing approximately $20,000. This brings the total number of external evaluations thus far conducted to two (2) costing approximately $32,000. |
| 2. Training | |
| a) 8 Regional Workshops, costing $329,600 were originally expected in Project Document. Approval given to reduce the number to 4. | 2 Regional Workshops were held during the year costing approximately $30,000. This brings the total number of Regional Workshops |

16. INPUTS cont'd

| INPUTS EXPECTED DURING LOP | INTERIM EVALUATION COMMENTS |
|---|---|
| a) cont'd | conducted to date to 4 costing about $85,000. (see Note 1 below). |
| b) 80 Territorial Workshops costing $99,640. | 18 Territorial Workshops were held during the year, costing approximately $17,000. This brings the total number of workshops thus far held to 36 costing about $35,000. |
| c) 48 Administrative Workshops, costing $240,000. | 10 Administrative Workshops were held during the year costing $8,000. The total number thus far held has been 20 workshops, costing about $31,000. |
| d) 480 Local Workshops, costing $37,200. | Approximately 95 Local Workshops were held during the year, costing about $5,000. The total number of workshops so far held is about 140 costing approximately $6,000. |
| 3. Travel and Replacement Costs | |
| a) Project Advisory Group, (PAG), costing $37,440. Nine (9) meetings scheduled. | One (1) PAG meeting was held during the year, costing approximately $9,000. To date three (3) PAG meetings have been held, costing approximately $21,000. |
| b) Replacement Staff, costing $513,000. Provision was made for ten (10) full-time Project Implementation Officers (PIO's) and 29 full-time equivalent subject matter leaders. | There has been no change in the size of staff during the year. Costs amounted to about $94,000 for the year. The corps remains at nine (9) full-time PIO's and 26 full-time equivalent subject matter leaders costing the Project to date about $184,000. |
| c) UWI travel, costing $15,000. | Approximately $3,000 was expended during the year bringing the total to date to approximately $12,000. |

16. INPUTS cont'd

| INPUTS EXPECTED DURING LOP | INTERIM EVALUATION COMMENTS |
|---|---|
| 4. Materials | |
| Costing $69,000 | Approximately $23,000 was expended during the year, thereby bringing the total to $48,000. |
| 5. Furniture and Supplies | |
| Cost $34,750. | During the year approximately $2,000 was expended, the amount so far spent under the project being approximately $33,000. |
| 6. Other Costs | |
| a) Inflation (10%) compounded annually), totalling $605,900. | To date, no claim has been made. Nevertheless inflation has been built into the costs of goods and services which have been procured under the Project. |
| b) Administrative and Common Services (10%), totalling $335,999. | Administrative and Common Services amounted to approximately $49,000 bringing the total to date to about $99,000. |

Note 1: A special regional workshop was conducted for selected representatives for the purposes of training them in developing reading materials for pupils (see Note 1 under Section 17). At least one other regional workshop will be held during the remaining two years of the project, bringing the total expected under the Project to at least five (5).

## 17. OUTPUTS

| ANTICIPATED OUTCOMES | INTERIM EVALUATION COMMENTS |
|---|---|
| 1. Curriculum | |
| New curricula to be developed in 4 subject areas (Language Arts, Mathematics, Social Studies, Science), for age group 7-11 years, in 5 pilot schools per territory, in each of 10 territories. | During the year new curricula were developed in 4 subject areas (Language Arts, Mathematics, Social Studies, Science), for age groups 9-10 years, in 5 pilot schools per territory, in each of 9 territories. These augment comparable materials which were prepared in previous years for the 7-8 and 8-9 year-olds. (see Note 1 below). |
| a) Development of improved syllabi for primary education in the above subjects. | During the year improved syllabi continued to be developed in the subjects, to be systematically evaluated before use according to specific criteria, field tested, revised appropriately, and disseminated. |
| b) Development of improved teachers manuals to accompany the syllabi. | During the course of the year teachers' manuals continued to be developed, with specific guidelines for instruction, background information and assessment techniques. |
| c) Development of improved instructional aids for pupils. | There continues to be the appropriate development of instructional aids based on the syllabi as well as the revision of these aids based on evaluative feedback from teachers. |
| d) Generation of a "refined model" for the curriculum development process including an accompanying administrators manual. | The model which has been adopted for curriculum development in this regional project evidently continues to be an appropriate one. |

17. OUTPUTS cont'd

| ANTICIPATED OUTCOMES | INTERIM EVALUATION COMMENTS |
|---|---|
| e) 450 teachers and supervisors per year (45 x 10 territories) including 60 subject matter leaders, trained in the use of new/revised syllabi and teachers manuals, through Territorial and Local workshops, supervision, consultations and revision. | Approximately 450 teachers, PIO's and subject leaders achieved these outcomes during the year bringing the totals for the project to 655. (see Note 2 below). |
| 2. Administration | |
| 280 Headteachers and supervisors per year - 25 x 10 territories plus 30 in Jamaica - trained: (a) to be familiar with new or revised syllabi and manuals; (b) to improve skills in curriculum development, in using a variety of appropriate teaching methods, while working with teachers, and in the use of a variety of assessment procedures; (c) to improve administrative skills in record keeping, financial accounting, discipline, scheduling, reporting, relationships with the community and PTA, school organization, and relationships with the Ministry of Education. | During the year a total of 10 territorial workshops were held to train approximately 205 principals and supervisors (20 x 9 territories plus 25 in Jamaica). As a result, the Project has thus far conducted 20 territorial workshops and trained about 255 principals and supervisors (including 39 in Jamaica). |
| 3. Education Planning | |
| Improved skills in educational planning on territorial basis. | No training activities took place in educational planning during the year. The sum total of training activities in this sphere therefore remains at one (1) regional workshop for 12 territories. |

17. OUTPUTS cont'd

| ANTICIPATED OUTCOMES | INTERIM EVALUATION COMMENTS |
|---|---|
| 4. Pupil Behaviour/Performance | |
| Pupils achieving specified objectives in subject matter areas and increased learning by pupils. | The Project emphasized during the year the development and administration of tests for units of work developed. Such units tests have therefore become the rule rather than the exception as was the case reported for previous years. There still remains, however, the problem of devising strategies of making overall assessments of student achievement as a result of the total Project effort. |
| 5. UWI Services to Territories | The following comments were made in the previous PES report: |
| Strengthening UWI to enable that institution to expand and extend its assistance to the territories in improving their educational systems, through (a) addition of faculty expertise, (b) expanding kinds of services rendered, (c) extending services to more territories on more frequent basis, (d) faculty development, (e) on-going involvement in the Projects as trainers in the workshops, consultants, evaluators. | "Seven (7) members of the UWI, Cave Hill staff - three from the R & D Section - have served as resource persons at Project regional and territorial workshops. Feedback from workshop participants indicated that their contributions were helpful. Feedback from principals indicates the the contributions of the three who participated in the educational administration workshops were especially useful. Arrangement for securing UWI staff assistance appear to be on an ad hoc basis rather than through a formal structural basis; Subject Matter Specialists have found that UWI faculty are responsive to requests for assistance. |

17. OUTPUTS cont'd

| ANTICIPATED OUTCOMES | INTERIM EVALUATION COMMENTS |
|---|---|
| | Restrictions on the R & D Section imposed by the UWI budget suggest that university contributions will continue at about the same level in terms of both quantity and quality."<br><br>Contrary to expectations there has been since then a continued expansion of UWI services to the territories, with a total of about 15 members of UWI serving in a resource capacity. |
| 6. Disseminations of Curricular Materials<br><br>Subprojects to give rise to (a) [illegible] analysis of materials reproduction, (b) development of a plan for inexpensive reproduction and dis[illegible] (c) distribution of [illegible] Project participants and territories, (d) development of a plan for wider disseminations in the territories beyond the pilot schools. | To date the plan for the wider dissemination of project materials has still not been completed and it seems likely that technical assistance may be sought in order to assist in completing the task (see Section 23). |
| 7. Territorial Capability for On-going Curriculum Development<br><br>Territories will develop a capability for improving their educational curricula which can be used after termination of the Project. | During the course of the year significant progress was made towards this outcome, as subject matter leaders assumed significant roles in curriculum development. |

BEST AVAILABLE

17. OUTPUTS cont'd

| ANTICIPATED OUTCOMES | | INTERIM EVALUATION COMMENTS |
|---|---|---|
| 8. | Project Advisory Group (PAG) and Project Implementation Units (PIU's) established. | During the year PAG's continued to meet and function in all territories. |

Note 1: The Evaluation Team made the following relevant remarks:

"The territorial governments have expressed a need for a greater emphasis to be placed on the development of appropriate readers for pupils. The special regional workshop on reading (see Note 1 under Section 16) trained a cadre of Language Arts subject specialists to prepare suitable materials for their pupils but there remains the problem of recruiting additional central staff to expedite the collation of the materials in the form of graded readers suitable for use on a regional basis."

Note 2: "The evaluation team founded evidence that steady progress was made during 1981-82 in all areas of curriculum development: Language Arts, Maths, Science and Social Studies with the last providing an exemplary model, in the judgement of the team. More guidance in the use of the materials has been provided by SMSs (Subject Matter Specialists) and resource persons including help in developing timetables or schemes and in using the materials more flexibly." (p.34).

"The curriculum materials produced by the Project were found to have had a significant impact on improving primary education in the pilot schools, and promises of having a similar impact on all primary schools in the region if they are disseminated widely and accompanied by training."

"Training activities conducted for teachers during the third year (1981-82) have given more attention to addressing the needs of participants. More persons (e.g. principals and non-Project teachers) are taking

Note 2 cont'd

advantage of training opportunities. There is a noticeable improvement in the training of administrators both in terms of number of opportunities and in program design and content." (p.45).

18. PURPOSE

The Project purpose was given in the previous PES, which contains a quotation from the Project Paper as follows:

> "The basic purpose of this subproject is to improve the learning environment for the primary school age group (7-11 years of age) throughout the Region. A related subpurpose is to strengthen the University of the West Indies School of Education, a regionally supported institution, to enable that institution to extend and expand its ongoing assistance program to the territories in their efforts to improve their educational programs."

The Project is designed to involve 12 English-speaking Caribbean territories in its three components as follows;

a) Curriculum development: Antigua, Barbados, Belize BVI, Dominica, Grenada, Montserrat, St. Kitts-Nevis, St. Lucia, St. Vincent.

b) Educational administration: The 10 territories mentioned above plus Jamaica.

c) Educational planning: The 11 previously mentioned territories plus Trinidad/Tobago.

Following are the approved End of Purpose Conditions with appropriate comments for the present PES.

| END OF PROJECT STATUS | EVALUATOR'S COMMENTS |
|---|---|
| 1. Pupils achieving learning objectives. | During the year a great deal of emphasis was placed on the development and administration of tests to accompany instructional units. There is still a need to ascertain how much students have achieved as a result of the total project effort. (see Section 23). |
| 2. Improved syllabi, teachers manuals and other instructional materials used by teachers. | During the year new materials for 9-10 year-olds were developed and will be provided to teachers in September 1982 for field testing in the pilot schools during 1982-83. These materials augment those for 7-8 and 8-9 year-olds that have already been piloted and revised. |
| 3. Teachers applying new instructional methods, e.g. increased use of child-centered activity. | All evidence suggests that pilot school teachers continue to be enthusiastic in using the new instructional materials and methods. Furthermore there was, during the year, a great demand by non-pilot schools and teachers for these new instructional materials. (see Section 20). |
| 4. Teachers covering a broader, more enriched content. | All evidence suggests that the curriculum syllabi/teachers guides continue to represent a significant improvement over the baseline syllabi and that the content remains relevant and interesting to pupils. |
| 5. Teachers utilizing more frequent classroom testing as part of the evaluation process. | This year, in particular, there has been increasing attention to the development of tests to accompany instructional units produced under the Project. There is evidence of this in all four subject areas. |

18. PURPOSE Cont'd

| END OF PROJECT STATUS | | EVALUATOR'S COMMENTS |
|---|---|---|
| 6. | Teachers creating materials for use by students. | Territorial workshops continue to assist teachers not only to familiarize themselves with the new curricula but also to enable them to create the materials. |
| 7. | Headteachers, principals and supervisors supporting the curriculum development process. | Of the 255 principals and supervisors who have been trained (see Section 17), the 45 pilot school principals are generally very supportive of the curriculum development process. |

We conclude this section on the same note as that struck on the last PES - namely, it seems likely that, with sustained enthusiasm from the Project participants, the learning environment for the 7-11 year olds will be improved and the Project purpose, therefore, achieved.

19. GOAL/SUBGOAL

The goal of the Caribbean Education Development Project is to enable the human resources of the Caribbean to achieve their full potential. The Primary Curriculum Subproject, in turn, attempts to contribute towards the accomplishment of this goal inasmuch as the subproject tries to improve the quality of the learning environment for the primary school age group.

The objectively verifiable indicators of the goal are (a) the reduction of unemployment levels, (b) increase in productivity and (c) lower birth rate. The annual reports and statistics of government are to be the means of verification.

Indeed it is as yet too early to determine whether the subproject, during its two years of implementation, has assisted in the attainment of this broad goal. Nevertheless, it appears that pupils in the region are developing understandings and skills which ultimately should have pay-off in terms of the reduction of unemployment levels and increase in productivity. Objective indicators of this impact cannot be available until much later, perhaps 8 to 10 years. Nevertheless, pupils are now beginning to develop significant understandings through Social Studies of their families, communities, and territories,

to develop higher level thinking skills through Mathematics and Science, and to develop improved oral and written communication skills through Language Arts. They will, therefore, eventually become more productive citizens in their respective territories.

20. BENEFICIARIES

The Project Paper states that the principal beneficiaries of the Project will be the estimated 18,000 pilot primary school students, and their 450 teachers and 50 headmasters (plus 270 other headmasters and supervisors) receiving administrative training. Ultimately the entire regional population of 1,020,000 primary pupils would share in the benefits of Project activities as their results are disseminated over a period of years by the processes put in place by the Project. Additional beneficiaries would be the unspecified number of individuals to develop a capability in educational planning.

During the year the Project intentionally initiated training for the following minimum number of persons: approximately 2008 primary school students and their 94 teachers in pilot schools as well as 25 principals and supervisors in Jamaica. Thus, the total number of persons who have been trained and continue to receive training under the Project to date is about 6124 primary school students, 282 teachers as well as about 255 principals and supervisors. No additional training was provided for educational planners during the year, with the result that the number of beneficiaries remains the same as reported in the last PES - that is, 18 middle level educational administrators from 12 territories having received training.

It is clear, however, that many more persons have benefitted from the Project than was anticipated at this phase of implementation (see Section 21 on the serendipitous effects of the Project). For the year under consideration, such people included the several additional classes of pupils that pilot schools have exposed to the new materials, the pupils outside of pilot schools that have been exposed through Ministry of Education, Teachers Colleges and individual principal and teacher efforts, the many children in non-participating territories (e.g. Anguilla and Turks and Caicos Islands) who are being exposed to the materials, as well as the several non-pilot teachers who have attended workshops.

21. UNPLANNED EFFECTS

The Evaluation Team appointed to review the Project stated in their June 1982 report that the following serendipitous outcomes, among others, have been noted:

1. The Project Office has issued the first in a series of Project Newsletters designed to share information among participating territories regarding the implementation of the Project. This new communication vehicle should prove useful in disseminating information about successful practices initiated under Project auspices.

2. In St. Kitts a Remedial Reading Centre was established in order to use Project material more effectively with slower learners. It is exemplary in its structure and the quality of services provided.

3. Several territories have begun to develop reading materials specially for their children.

4. In Belize there is a high degree of integration among the programmes and functions of the Ministry of Education and the Primary Education Project. For example, the Curriculum Development Centre has become integrally involved in the dissemination of Project materials.

5. At Georgetown School in St. Vincent, the implementation of the Project curriculum has led to the development of team teaching three days per week for Language Arts, Mathematics, and Social Studies.

6. A principal in St. Lucia reports that his school was "revolutionized" as teachers at the higher levels helped teachers at the lower levels and in so doing became inspired to make comparable changes in their teaching and curriculum prior to official involvement in the Project.

7. Throughout the territories teachers report remarkable growth in the thinking abilities and enthusiasm of pupils for Project learning experiences.

8. Some untrained teachers were found to be functioning effectively with groupings in subjects and individualizing learning experiences as a result of following the Project guides and participating in Project workshops.

9. Project curriculum materials are becoming widely used in Teachers' Colleges.

10. In one Project school in St. Vincent, Project teachers cooperated in taking the 80 pupils in their classes on an extended field trip to the Airport, the first ever for the school. Appropriate spin-offs resulted in Language Arts and Social Studies classes.

11. Several principals began to prepare teachers of 9-10 year-olds through staff meetings and direct assistance in advance of the Project schedule. This advance planning was perceived as evidence of high administrative commitment and involvement in the Project process.

12. There now exists a coordinated working relationship between the Project and the Pan American Health Organization (PAHO) in the development of curriculum materials. Continuation of this relationship, including the dissemination of health-related

curriculum products, is anticipated during the next two years.

13. There has been even greater spread of Project impact than was reported in the previous PES. There was substantial evidence that Project materials were often disseminated to non-Project teachers and sometimes those teachers were included in Project workshops. Another spread effect occurred as a result of Project materials becoming widely used in Teachers Colleges, as well as in the classrooms used as field sites for practice teaching. (In Antigua some Teachers College students, as part of their field work, are even doing research on the effectiveness of Project materials). A third example of spread effect has occurred through a British Development Division Science Advisor, who is now using Project Science materials as a basis for training teachers and has taken the materials to territories either not involved in the Project (viz. Anguilla and the Turks and Caicos Islands) or those which are involved but which did not opt for Science under the aegis of the Project (viz. Antigua and Dominica).

22. LESSONS LEARNED

Experiences during the year lead us to reiterate the following statements made in the previous PES concerning the management of multilateral projects that are executed by regional institutions.

> "Projects of a regional nature pose complex implementation problems because of the multiplicity of bureaucratic procedures among the participating territories. For example, the determination of an appropriate budgetary allocation for the travel of Project Implementation Officers (PIO's) requires a careful consideration of the widely differing procedures used by the various governments in paying the travel of their public officers. A certain measure of empathy must, therefore, guide attempts to resolve administrative issues which arise during project implementation."

In the same section in the previous PES we suggested that if the Project is to have maximal impact on the territories, one highly recommended follow-on activity would be to disseminate the new, improved instructional materials beyond the pilot schools during and/or after the life of the project, following a study of alternative methods of disseminating the materials.

It is true that the plan has not been completed as quickly as was anticipated and that technical assistance may be needed to complete the task. Nevertheless it is becoming clear that the success of the dissemination efforts reside not merely in the reproduction of the instructional materials on a regional basis, but also on appropriate orientation being given to potential users of these materials.

Also regarding possible follow-on activity, it was stated that while new improved instructional materials would have been produced for the 7-11+ age group under this subproject and for the 15 to 17 year olds under the CXC/USAID Secondary Curriculum Subproject, no attention has yet been paid to the age group 12-15 years. The Project has also recognized that the needs of children in the infant age group 5-7 have not been addressed. Finally the question of whether the proposed termination of the Project in May 1984 will permit the adequate evaluation and final revisions of all instructional materials,has been of some concern to the Project administrators. As a result UWI is now giving some preliminary thought to the possibility of extending the Project in time, in target group level, or both. Obviously both UWI and USAID will need to give careful consideration to these matters at the appropriate time.

23. SPECIAL COMMENTS OR REMARKS

This section contains remarks on the status of previous evaluation recommendations and on new issues which need to be addressed.

Status of previous evaluation recommendations. In the previous PES we recorded a number of issues which needed attention and we now report on the status of these.

1. The search for a workable solution for the payment to UWI Project Staff of per diems that do not exceed USAID's maximum per diem rates. There has been no further discussions of this issue ever since USAID indicated several months ago its inability to pay rates that exceed its maximum rates and asked the University to work out a preferred solution on the basis of some proposals that it informally suggested.

2. The determination of a realistic level of participation in Project territorial activities by R & D Staff at UWI. The participation of the UWI staff has increased (see Section 17). Furthermore the University has made available the sum of app. US$30,000 for the appointment of one faculty member to assist in Project activities but the appointment has not yet been made (see below).

3. The upgrading of the quality of materials produced in Language Arts. Curriculum development in this area has progressed considerably. In the area of Reading, too, much expertise has been developed amongst local personnel as a result of project activity and steps are now being taken to obtain technical assistance to assist in the compilation of graded readers, based on materials that have been produced under the Project.

4. The development of a plan of regional activities under Education Planning. At the last Project Advisory Group (PAG) meeting held in May 1982, the Chief Education Officers clearly prioritized their needs in the area of educational planning based upon a position paper prepared by the Project Office. The tentative proposals still need to be costed.

5. A study of the feasibility of disseminating Project curriculum materials beyond pilot schools. A rough estimate of the cost of dissemination was provided by the Project Office during the year. Subsequent discussions with key project personnel have indicated that the plan, if it is to be successful, must provide for appropriate orientation for non-pilot school teachers who are to use the disseminated material. It is now quite likely that technical assistance may be recruited to expedite the preparation of the plan. (see also Section 17).

6. Obtaining additional help to complete the collection and analysis of all baseline data. In the previous PES we noted that the Project Evaluation Design requires that a considerable amount of baseline data be provided for the establishment of a benchmark to measure progress toward the achievement of Project activities but that much of the collected data remained untreated. During the year the University's computer facilities were used to analyze some of the data. Most of the baseline data, with the exception of data on pre- and post-tests from pupils (see below) have been collected, processed and, in a number of cases, reports have either been prepared, or are in preparation, or will be completed shortly. The task has not been completed partly on account of the demise of the Evaluation Specialist. For this reason as well as because of the continuing and emerging needs in the sphere of evaluation (see below), it is crucial that the vacant post be filled as quickly as possible.

New issues which need to be addressed. - During the year the following new issues emerged.

1. Finding a replacement for the Evaluation Specialist. As indicated above, the year under evaluation saw the unfortunate demise of the Evaluation Specialist. The search for a suitable replacement has been initiated but this needs to be accelerated so that the Project staff will have, at the earliest possible date, an individual to give direction to internal Project evaluation during the remaining two years of the Project. Such a person is needed also to ensure: (a) that data collected is not merely voluminous but provides real evidence of Project success; (b) that the slight alterations in the Evaluation Plan proposed by the team are implemented; (c) that data is collected to show evidence of pupil achievement in the Project classes (see below); (d) that the necessary data is collected to justify a request for an extension of the Project; and (e) that data is collected in preparation for the terminal evaluation.

2. The utilization of app. US$30,000 made available by the University. During the year the University made available to the project the sum of app. US$30,000 to recruit one additional staff member to assist in Project work. To date this additional staff member has not been recruited.

3. Procuring short-term technical assistance to facilitate: (a) the preparation of graded readers in Language Arts; and (b) the completion of the plan for the dissemination of Project materials beyond pilot schools. (see Section 17).

4. The need to collect data to show pupil achievement in Project classes. The Evaluation Team admitted that this aspect of evaluation is complicated. Possible sources of data would be: the comparison of pre-and post-test results for individual units of work; the results of term-end or year-end achievement tests set by teachers; and the results of standardized tests to compare the performance of Project class pupils with that of non-project class pupils. This aspect of internal evaluation underlines the need for expeditiously recruiting an Evaluation Specialist for providing central leadership.

5. The need to train teachers, principals and subject leaders in evaluation procedures. The team made this recommendation in the face of the inadequacy of the reporting by subject specialists, consultants, resource persons and PIO's. What is needed, the team pointed out, was not merely a descriptive reporting of what happened but also evidence that what happened had some effect/impact on teachers and pupils. In this respect too, the team pointed out that while the educational administration workshops reflected the important elements of quality, timeliness and relevance, there was some evidence that greater emphasis should be placed on workshops activities to assist administrators to become skillful in evaluation procedures and curriculum development.

ATTACHMENT

Evaluation Report of the UWI/USAID Primary Curriculum Subproject - (Caribbean Education Development Project No. 538-0029). Submitted by Dr. Karl Massanari, Dr. Joanne Whitmore and Dr. Cordell Wynn. 46pp. plus Appendices.

PRIMARY EDUCATION PROJECT

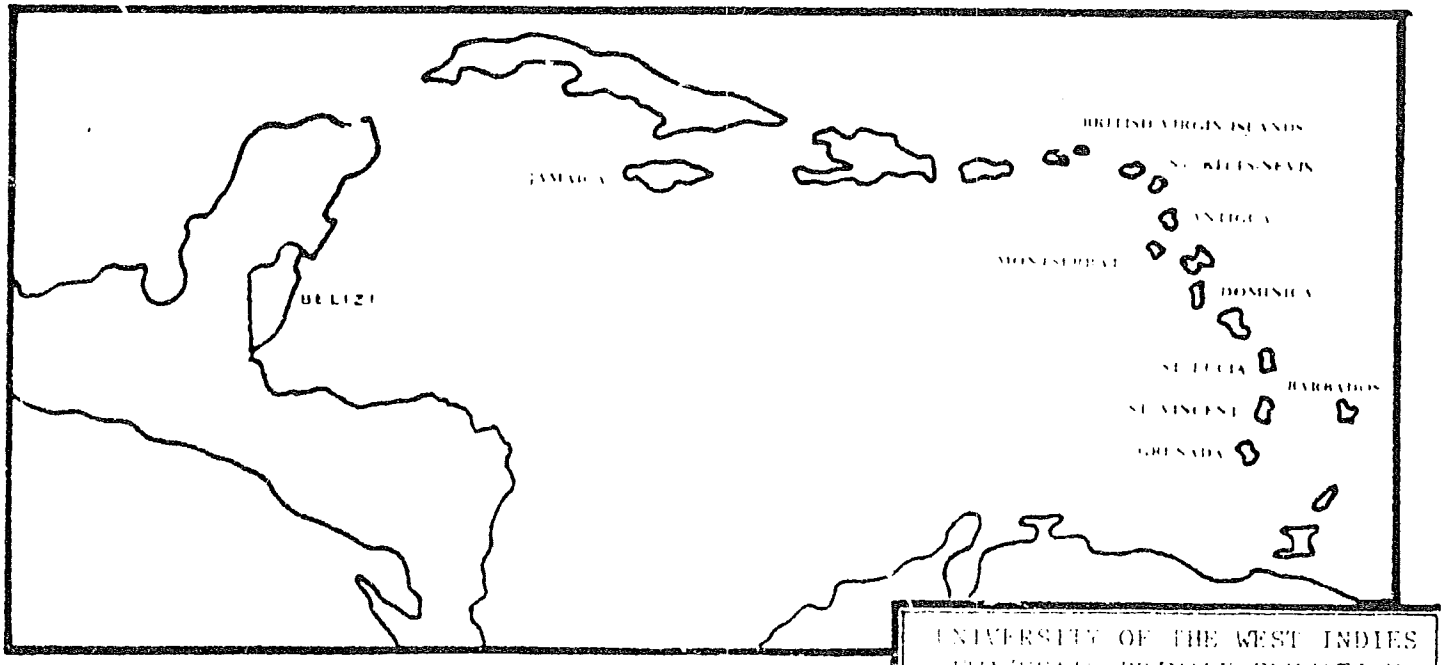
# EVALUATION REPORT OF

# THE UWI/USAID PRIMARY EDUCATION PROJECT

Caribbean Education Development Project
No. 538 - 0029

Submitted by

Dr. Karl Massanari
Dr. Joanne Rand Whitmore
Dr. Cordell Wynn




UNIVERSITY OF THE WEST INDIES
UWI/USAID PRIMARY EDUCATION
PROJECT
SCHOOL OF EDUCATION

June 23, 1982

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## INTRODUCTION

This is the report of an external evaluation team from the United States to evaluate the progress of implementation in the third year of the five-year UWI/USAID Primary Education Project. It is the second annual mid-Project evaluation report prepared by the same evaluation team. The three-member team was composed of the following persons:

| | |
|---|---|
| Dr. Karl Massanari, Chairman | Former Associate Director of the American Association of Colleges for Teacher Education and Director of the ERIC Clearinghouse on Teacher Education, Washington, D. C; currently Consultant to the College of Education, University of Florida |
| Dr. Joanne Rand Whitmore | Former head of teacher education programs in Early Childhood, Elementary, and Special Education, George Peabody College for Teachers, Nashville, Tennessee; currently Assistant Dean for Teacher Education, College of Education, Kent State University, Kent, Ohio |
| Dr. Cordell Wynn | Former Dean, School of Education, Alabama A and M University, Huntsville, Alabama; currently President of Stillman College, Tuscaloosa, Alabama |

The team was invited to visit the ten participating territories during the period May 17 to June 12, 1982.

The team wishes to express its appreciation of the warm hospitality extended to members and the cooperation received in conducting the evaluation visit. Without such cooperation and assistance the work of the Team would have been seriously hampered. Special acknowledgement is due to Dr. Desmond Broomes, Vice Dean of the School of Education, UWI/Cave Hill, who in effect serves as the Project Director in the absence of the officially designated Project Director, Dean Aubrey Phillips, located at the Mona Campus of UWI; Dr Leonard Shorey, Project Coordinator; and Ms. Jan Best, Project Secretary.

The Project Implementation Officers (PIOs) in the territories visited by the team also deserve special thanks; their assistance was indispensable to the facilitation of our work.

| | | | |
|---|---|---|---|
| Kenneth Agard ..... | Barbados | Verna West ..... | Montserrat |
| Veronica Augustin .... | St. Lucia | Charles Roberts ... | Antigua |
| Cynthia Edwards ..... | St. Kitts/ Nevis | Darrell Diaz ..... | Belize |
| Jerome Joseph ..... | Dominica | Lucia Walters ..... | BVI |
| Austin Nurse ..... | St. Vincent | | |

Dr. Trevor Turner serves as Coordinator of the Jamaica UWI Mona Campus component of the Project.

The Role of the Evaluation Team

The role of the external evaluation team is to make and report judgments concerning progress being made in meeting Project objectives as delineated in the Basic Project Document. An evaluation plan, developed during the first year of the Project, assisted the team in giving structure to its work and report.

The team made its observations and formulated its evaluative judgments this year on the basis of a comprehensive scope of activities including:

- conducting interviews with 20 territorial Ministry of Education personnel
- conducting interviews with all ten of the Project Implementation Officers (PIOs)
- visiting 31 of the 50 Project schools
- visiting all ten of the participating territories
- interviewing 33 Project School principals and 106 teachers
- interviewing 38 territorial Subject Leaders
- visiting/observing 94 classes in Project schools
- attending 4 Project Implementation Unit (PIU) meetings and 1 territorial workshop
- conducting interviews with UWI faculty: 6 at Mona, and 11 at Cave Hill
- conducting interviews with the 5 primary Project staff members
- interviewing 2 US-AID officers
- examining numerous Project reports submitted by Project staff, PIOs, consultants
- examining available data summaries and analyses
- integrating our findings, summarizing our observations, and formulating our evaluative judgments.

A detailed summary of the team's visits, interviews and activities is presented in Appendix No. 1 to this report. The comprehensiveness of the scope of evaluation activities provided the necessary background for the team to formulate its judgments, make its recommendations, and prepare this report.

For the purpose of clarifying the role of the evaluation team, it should be noted that it is not the function of the team to collect and analyze data prepared by the various territories. This is a responsibility of the Project Staff. The team studied the internal project evaluation based on the analysis of data and used this information as further background for formulating its observations and recommendations.

## The Nature of the Evaluation

The nature of this evaluation, as was true of the evaluation in 1981, should be regarded as formative rather than summative evaluation. That is, while it addresses the matter of progress being made in achieving anticipated Project outcomes, at the same time it provides direction for modifying the conduct of the Project in ways that hopefully will enhance its effectiveness between now and 1984. Thus, formative evaluation can be used to strengthen Project implementation.

## The Nature of this Report

This report is to be viewed and interpreted as an extension of the 1981 report submitted by the same team. It was considered unnecessary to repeat detailed descriptions of processes included in the earlier report. This report treats new developments occurring during the 1981-82 year as well as comments on the implementation of the team's recommendations included in the 1981 report.

This report is presented in two major parts (1) specific and brief comments related to the progress of Project implementation as outlined in the evaluation plan, and (2) a discussion section including observations, concerns and recommendations.

## PART I. OVERVIEW OF PROJECT ACCOMPLISHMENTS

Part I of this report includes appropriate comments by the evaluation team using the original evaluation plan designed for Project implementation. However, attention is called to Section II - B in Part II in which the team makes specific recommendations for modification of the original plan for documentation and internal evaluation. The team recommends that for the remainder of the Project during 1983 and 1984 those modifications replace the original evaluation plan. The rationale for modifications of the original plan also is included in Section II - B of Part II of this report.

| Baseline Data About: | What we want to know about the present situation* | How we propose to find out about the present situation | Time Schedule | Evaluator's Comments 1981 |
|---|---|---|---|---|
| 1. Curriculum content and materials for primary education in<br>• language arts<br>• science<br>• math<br>• social studies | a. appropriateness of syllabi now used: content, organization, sequencing<br>b. appropriateness of syllabi for age level of pupils: language, understandability of content<br>c. appropriateness of teachers' manuals especially in regard to encouraging the use of a range of teaching methods/approaches, and assessment procedures<br>d. appropriateness of syllabi and manuals from the standpoint of specification of learner objectives<br>e. appropriateness of instructional aids for pupils | a., b., c., and d. and e.<br>• examination/analysis of syllabi, manuals, and instructional aids for pupils in terms of established Guidelines (See p. 11)<br>• examination/analysis to be conducted at workshops (R, T, and L) and at other times and with the involvement of teachers, head teachers, supervisors, PIOs, subject specialists, teachers college and UWI staff, CEOs, and project staff.<br>• determination of appropriateness of curriculum content and materials to be made on the basis of collective professional judgment | First stage August, 1980 and thereafter on-going | Some territories submitted no syllabi; some territorial syllabi comprised only a brief list of topics; some territories had relatively well developed syllabi. Generally, baseline syllabi were found lacking in scope and depth of content, sequencing of learning experiences, provision of objectives, and guidelines for instructions. With very few exceptions tests and instructional aids were not included, and a variety of teaching methods were not suggested. Although time did not permit an extensive systematic evaluation of syllabi against specific criteria Subject Matter Specialists did engage in a deliberate, methodical collection and analysis of syllabi to determine a common core of content among territories and strengths/weaknesses in existing content and practices. |

1.a-e 1982

No further comments.

| | | | | |
|---|---|---|---|---|
| 2. Teacher behavior/ performance | a teachers' perceptions about use of curriculum materials<br>b the kinds of teaching methods/approaches that teachers now use<br>c the extent to which they now develop instructional aids for their pupils<br>d. the kinds of assessment procedures they now use<br>e. the kinds of help teachers now need most to improve their teaching | a. Teacher Survey Instrument (TSI)<br>b. TSI and classroom observation by trained observers (See p. 13 & p. 15)<br>c. Same as b.<br>d. Same as b.<br>e. TSI | Begin October, 1980 | 1981<br>Data collected, not analyzed<br><br>1982<br>No new information available to team; apparently, no change. |

* The collection of baseline data is needed by the Project for three reasons:

1. To confirm the basic assumptions made in the Project document
2. To provide a basis for giving direction to Project activities
3. To provide a basis for evaluating Project achievements

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| Baseline Data About: | What we want to know about the present situation | How we propose to find out about the present situation | Time Schedule | Evaluator's Comments |
|---|---|---|---|---|
| 3. Head Teacher and Supervisor behavior/ performance | a. their perceptions about their respective roles<br>b. their perceptions about changes needed in curriculum content and materials, teaching methods, other<br>c. their rating of the present learning environment for pupils<br>d. the kinds of help they need most to improve administrative/ supervisory skills<br>e. their perception of the significance of the project | a.-b.-c.-d.-e.<br>Administrators/Supervisors Survey Instrument (ASSI)<br>and / or<br>Administrators/Supervisors Interview Schedule (ASIS) | Begin October, 1980 and thereafter on-going | Data collected but not analyzed<br>3. a-e 1982<br>No new information available to team apparently, no change. |
| 4. Pupil attitudes as an aspect of the learning environment | How pupils feel about school, their subjects, their peers, out-of-class activity, and about themselves | Pupil Attitude Inventory (PAI) to be administered by teachers and with additional information about each pupil to be provided by the respective teacher (See p. 17) | Begin October, 19 and thereaf on-going | 1981<br>Data collected but not analyzed<br>1982<br>No new information available to team; apparently, no change. |
| 5. UWI activity in the region | Information about the nature and extent of assistance now provided by UWI to the territories to assist them to improve their educational systems | Survey Instrument and/or Interviews<br>• appropriate UWI School of Education administrators and faculty<br>• other: e.g., territorial ministries of education, PIOs, subject matter specialists | Completed by August, 1980 | 1981<br>UWI reports that the R and D section, Cave Hill, for years has been involved in various territories with providing assistance in curriculum development and personnel training<br>1982<br>Increased involvement by the R and D Section and the In-Service Unit of UWI-Cave Hill Campus, School of Education. |



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| | | | | |
|---|---|---|---|---|
| 1981 | | | | |
| 6. Primary education systems/pilot schools | Characteristics of systems: e.g., structure, provisions. Nature of pilot schools: urban/rural, locale, size, t-p ratio. Teachers - quality, number Pupils - number, sex, age | Instruments to be administered by the ministry, PIOs, Heads, and Teachers | Begin August, 1980 | Data collected and analyzed<br>1982<br>Data collected, analyzed, and reported to USAID and to territories. |
| 1981 | | | | |
| 7. Eleven-plus examinations | Information regarding nature of contents of the various examinations | Collect and analyze sample copies of examinations annually from the ministry of education | Completed by August, 1980 | Not completed<br>1982<br>No new information available to team; apparently, no change. |

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| Aspect of Educational Program | INTENDED OUTCOMES: what we are trying to accomplish. Changes we are trying to bring about; PRODUCT we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS - 1981 |
|---|---|---|---|---|---|
| 1. 1981 Curriculum | a. formulation and establishment of Guidelines to be used for curriculum content and materials development, and for evaluating current resources | • PS develops draft<br>• reactions from PIOs, CEOs, SMS, Con, others<br>• revision<br>• dissemination | • evaluation of appropriateness of Guidelines based on professional judgment of PIOs, SMS, CEOs, PS, Con, other | On-going through the life of the project | No evidence of established guidelines for developing curriculum content/ materials or for evaluating resources<br>1982<br>a. Although curriculum products reflect a systematic approach to curriculum development and evaluation, no written guidelines are in evidence. |
| 1981 | b. development of improved syllabi for primary education in 4 subject areas | • development based on Guidelines, at Terr. and local workshops<br>• field testing<br>• revision<br>• dissemination | • evaluation of instrument based on Guidelines, by T, HT, Sup, SMS, PIOs, Con, PS, other<br>• effectiveness of field testing judged by T, HT, Sup, other | | Improved syllabi were developed for levels 7-8 and 8-9, systematically evaluated before use according to specific criteria, field-tested, revised appropriately, and disseminated |
| | c. development of improved teachers manuals to accompany the syllabi | • same as b. above | • same as b.-1 above<br>• effectiveness of field testing judged by T, HT, Sup, CO, other | | Syllabi were developed as teachers' manuals with specific guidelines for instruction, background information, and assessment techniques included. |
| | d. development of improved instructional aids for pupils | • same as b. above<br>• development by teachers locally | • same as b.-1 above<br>• effectiveness of field testing judged by P and T | | Instructional aids have been appropriately developed for syllabi and revised based on evaluative feedback from teachers. |
| | e. generation of a "refined model" for the curriculum development process including an accompanying administrator's manual | • PS develops drafts of model and manual<br>• reactions from CEOs, PIOs, SMS, HT, other<br>• revision<br>• dissemination | • appropriateness of model and manual judged by HT, PIOs, CEOs, Con, PS | 1984 or after | The "model" is evolving as the process of curriculum development demonstrated and experienced in the project.<br>1982<br>The model is continuing to evolve. |
| | | | • for a., b., c., d., and e., activities will be evaluated to ascertain effectiveness of the process used in achieving anticipated outcomes; feedback used to improve project implementation | | 1982<br>b-c-d. The development of appropriate syllabi (core curriculum outlines), teachers' manuals (teaching/ learning experiences) and instructional aids for pupils (worksheets and activity resources) has been completed through level III (ages 9-10). |

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| 1981 Aspect of Educational Program | ANTICIPATED OUTCOMES: What we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS - 1981 |
|---|---|---|---|---|---|
| 2. Teacher behavior/performance | a. the use of new/revised syllabi and teachers manuals | • training through Terr. and local workshops, supervision, consultation<br>• field testing and revision | Teacher Survey Instrument and Classroom Observation by trained observers using a Classroom Observation Schedule | On-going through the life of the project | PIOs trained to do observations;<br>Data collected, but not analyzed |
| | b. improved skills in using new/revised syllabi and manuals | • same as a. above | | | |
| | c. use of a variety of appropriate teaching methods/approaches | • same as a. above<br>• demonstrations by master teachers | | | |
| | d. development and use of a variety of appropriate instructional aids for pupils | • same as a. above | | | |
| | e. use of a variety of appropriate assessment procedures | • same as a. above | | | |
| | f. use of assessment results for modifying instruction as well as for measuring pupil learning outcomes | • same as a. above | | | Some units developed for 7-8 yr. olds; 8-9 yr. old units being prepared as part of the curriculum development process |
| | | | • for a., b., c., d., e., and f. activities will be evaluated to ascertain effectiveness of process used in achieving anticipated outcomes; feedback used to improve project implementation<br>• analysis of needs to be reported back periodically | | 1982<br>2. a-f. PIOs, Subject Specialists, and Subject Leaders are making more visits to schools and observing more classes. Systematic observation of classroom teaching using a formal schedule/instrument no longer seems feasible. (See section II-B in Part II treating documentation and internal evaluation.) |



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| 1981<br>Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS – 1981 |
|---|---|---|---|---|---|
| 3.<br>Administrators (Head Teachers) and Supervisors behavior/ performance | a. familiarity with new or revised syllabi and manuals<br>b. improved skills in curriculum development process<br>c. improved skills in working with teachers in using a variety of appropriate teaching methods<br>d. improved skills in the use of a variety of assessment procedures, and in the use of assessment results<br>e. improved skills in planning and conducting faculty development programs<br>f. improved administrative skills in such other areas as:<br>• record keeping<br>• financial accounting<br>• discipline<br>• scheduling<br>• reporting<br>• relationships with community and PTA, including conducting PTA meetings<br>• school organization<br>• relationships with Ministry of Education<br>• other<br>g. improved skills in educational planning on territorial basis | TRAINING: through territorial workshops and consultative help provided at the local level by PIOs, consultants, other | Administrators and Supervisors Survey Instrument<br>and / or<br>Interviews with administrators and supervisors using Interview Schedule<br>and / or<br>evaluation by teachers, CEOs, PIOs, other | On-going through the life of the project | Workshops have been held to familiarize principals/head teachers and supervisors with new syllabi and teachers manuals and to assist in the improvement of administrative skills |
| | | | | | 1982 |
| | | | | 3. a–f. | Training of administrators has occurred on a more frequent basis; more people are involved and there is more participation of principals in regional and territorial workshops. |
| | | | | | One workshop on educational planning held |
| | | | • for a., b., c., d., e., and f., activities will be evaluated to ascertain effectiveness of process used in achieving anticipated outcomes; feedback will be used to improve project implementation | | 1982 |
| | | | | | g. Plans are evolving through the PAG to provide more training at the territorial levels. |

| 1981<br>Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS - 1981 |
|---|---|---|---|---|---|
| 1.<br>Pupil behavior/ performance | a. use of the new/revised instructional aids for pupils developed by teacher | • to be achieved through appropriate teacher activity: instruction, supervision | • Teacher Survey Instrument<br>• Classroom observation | On-going through the life of the project | Baseline data collected, not analyzed |
| | b. improved attitudes toward school and learning | • to be achieved through use of new curriculum content and materials, and improved methods of teaching | • Use of Pre-Post Pupil Attitude Inventory | | |
| | c. pupils achieving specified objectives in subject matter areas | • same as b. above | • Periodic assessment of pupil achievement of specific objectives by teacher | | Drafts of unit tests have been developed for some subject areas and for some units<br>No assessments to date other than the Stanford Reading Diagnostic Test |
| | d. increased learning by pupils | • same as b. above | • Detailed records maintained by teacher | | |
| | | | • for a., b., c., and d., activities will be evaluated to ascertain effectiveness of process used in achieving anticipated outcomes; feedback will be used to improve project implementation | | 1982<br>No major changes noted this aspect. See section II-B in Part II for recommendations. |

BEST AVAILABLE

| 1981<br>Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS - 1981 |
|---|---|---|---|---|---|
| 5.<br>UWI services to territories | a. strengthening UWI to enable that institution to expand and extend its assistance to the territories in improving their educational systems | • addition of faculty expertise<br>• expanding kinds of services rendered<br>• extending services to more territories and on a more frequent basis<br>• faculty development<br>• on-going involvement in the Project as<br>- trainers in the workshops<br>- consultants<br>- evaluators | • evidence of UWI commitment<br>• evidence that kinds of services have been expanded<br>• evidence that services have been extended<br>• evidence of involvement in project activities<br>• assessment of the effectiveness of services rendered to be judged by T, HT, SMS, PIOs, CEOs, PS, | On-going through the life of the project on an annual basis | . seven members of the UWI, Cave Hill staff - three from the R and D Section - have served as resource persons at PEP regional and territorial workshops<br>. feedback from workshop participants indicates that their contributions were helpful<br>. feedback from principals indicates that the contributions of Mr E Newton, Mr R Nicholson and D F Scott were especially useful in the administration workshops<br>. arrangements for securing UWI staff assistance appear to be on an ad hoc basis rather than through a formal structural basis; Subject Matter Specialists report that UWI assistance has been adequate and reasonable within the constraints of time and budget set by the University; SMSs have found that UWI faculty are responsive to requests for assistance<br>. restrictions on the R and D Section imposed by the UWI budget suggest that university contributions will continue at about the same level in terms of both quantity and quality<br>. it was reported that PEP has provided professional development opportunities for some UWI staff |
| | | | • activities will be evaluated to ascertain effectiveness of the process used in achieving anticipated outcomes; feedback used to improve project implementation | | |

1982

There has been a continued expansion of services to the territories.

| 1981 Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS – 1981 |
|---|---|---|---|---|---|
| 6. Dissemination of Curricular Materials | | | | | Not yet completed. |
| | a. cost analysis of materials reproduction | • by Project staff | • cost analysis report | Annually and on-going | 1982 No new information; still a major need. |
| | b. development of a plan for inexpensive reproduction and distribution | • by Project staff in consultation with UWI and other agencies<br>• reactions from CEOs, PIOs<br>• revision | • assessment of effectiveness of plan | | Not yet completed |
| | c. distribution to CEOs, HT, T, Sup, SMS, PIOs, Project staff, other | • in accordance with the plan - b. | • assessment of effectiveness of plan | | Not yet completed |
| | d. development of a plan for wider dissemination in the territories beyond the pilot schools | • same as b. above | • evaluation by CEOs, PIOs, T, HT, Project staff | | Not yet completed |

b-c-d. 1982

A general plan for the region has not been completed yet. However, the team observed significant movement toward the establishment of a cost effective method of dissemination in numerous territories, i.e., discussions and preliminary plans for reproducing and distributing (a) project materials to non-project schools and (b) materials in the subject area not selected for project activity. Evidence of fully developed plans for systematic dissemination with adequate financial support to enable success still is not in existence.

| Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS – 1981 |
|---|---|---|---|---|---|
| 7. Territorial capability for ongoing curriculum development | Territories will develop a capability for improving their educational curricula which can be used after termination of the Project | • by gaining experience through participation in the 5-year Primary Education Project<br>• by having available increased expertise<br>• motivation for continued efforts should come from positive results of having participated in this Project | • Evaluation can not be made until after termination of the Project | End of Project | Not applicable |

1982

Significant progress toward this outcome already observable.

| Aspect of Educational Program | ANTICIPATED OUTCOMES: what we are trying to accomplish; changes we are trying to bring about; PRODUCTS we propose to develop | PROCESS: activities leading to achievement of anticipated OUTCOMES | EVALUATION: how we propose to evaluate the extent to which the anticipated outcomes were realized | TIME SCHEDULE | EVALUATOR'S COMMENTS – 1981 |
|---|---|---|---|---|---|
| 8. Territorial eleven-plus examinations | Impact on nature of the examinations and their content | • involving ministry of education personnel in on-going activities of the Project<br>• involve them in construction of appropriate end of year tests for 11-year-olds | Analysis of eleven-plus examinations in relation to Project goals by Project staff | Annually | analysis of 11 plus examinations incomplete<br>assistance given to one territory in developing common entrance examination |

1982

The team is unaware of any progress in this area. We see a potential problem regarding the importance attached to the 11+ examinations and the probable incompatibility of their contents to that included in the PEP curriculum materials. We recommend rapid progress toward revision of the 11+ exams so that the content taught to 10-11 yr. olds under PEP will be reflected and so that these students will not be at a disadvantage when writing the territorial 11+ exams.

# PART II

## DISCUSSION SECTION: OBSERVATIONS, CONCERNS, AND RECOMMENDATIONS

This part of the report includes the observations, concerns, and recommendations of the team and includes sections on administration of the project including ancillary support systems; documentation and internal evaluation; the curriculum development process, products, and dissemination; the training component of the project; looking ahead to the terminal evaluation in 1984 and to a possible extension of the project; and a conclusion section.

### I. Administration of the Project including Ancillary Support Systems

This section pertains to the functioning of the administration of the Primary Education Project. It includes not only those units which have primary responsibility (UWI's School of Education and the Project Staff), but also those units which have indirect responsibility and which are part of the ancillary support system which assists in Project implementation. It includes team observations, concerns, and recommendations.

#### The University of West Indies, School of Education, Cave Hill Campus

Because of its critical importance to Project implementation, the team wishes to comment at greater length on this aspect of Project administration than is true of other aspects.

As the grantee of the US-AID Primary Education Project, the University of West Indies carries primary responsibility for its implementation. As noted in the Project document (page 1), "the Project will improve the quality of the learning environment for the primary school age group (7-11), and enable the UWI to expand and extend its assistance to the territories in improving their educational systems." Further in this document (page 13) it is noted that "the participation of UWI will help to cement its role as an outreach organization since it will be working more closely with more Ministries."

Overall management responsibility for PEP is vested in UWI operating through its School of Education. The Dean of the SOE (located on the Mona Campus) serves as the Project Director. For administrative purposes, the PEP is organized as a "separate" unit within the School of Education - Cave Hill Campus, the other two responsible units being the R and D Section and the Inservice Education Section (IES). The former is financed directly from the general University funds, while the latter is funded entirely by the government of Barbados.

The team's perception of the contextual arrangements within which PEP is conducted suggests that, while the Project necessarily is organized separately as an administrative unit within SOE, it is SOE which functionally carries responsibility for Project implementation. That is, PEP is part of the whole, but it is the whole of SOE which carries overall responsibility.

If this perception is accurate, as we believe it is, then the degree and quality of interrelationships among the three units are of paramount importance to successful Project implementation. This means that there should be collaboration, interaction/interfacing, and cooperation among the three units on a continuing basis. The concept of "twinning" Project personnel with SOE faculty members (mentioned by several of the faculty members interviewed) seems especially appropriate in this connection. This means further that the Project in all phases of its implementation must be viewed as an integral part of the SOE on a continuing basis, and not as an isolated island with only perfunctory ties to the main base. This in no way, however, diminishes the role or the responsibilities of the Project Coordinator. In a larger sense, it can enhance his role.

In this context the team wishes first to comment on certain positive developments which have occurred during the past year (1981-1982):

1. The University has allocated from its own resources the sum of BDS$60,000 to be used by the Project for much needed additional personnel. This allocation is indicative of a University-wide commitment to the Project.

2. There has been some progress in utilizing the expertise available in the R and D Section and in the Inservice Section for Project implementation.

3. There is an increased readiness on the part of at least some faculty members in R and D and in Inservice to be used in Project activities on an above-the-regular-load basis.

4. There is evidence that there was an increase in the number of meetings held involving personnel from the three units (R and D, Inservice, and PEP).

5. There appears to be greater awareness and sensitivity on the part of personnel in all three units for the need to work together in meeting UWI/SOE's obligations for Project implementation.

6. There is some evidence to indicate that, while PEP has received some positive contributions from the SOE at-large, the SOE has also benefitted from participation in the Project.

Secondly, the team wishes to register the following major concerns and recommendations regarding this aspect of Project administration:

1. It is recognized that a search process is underway to secure a replacement for the Evaluation Specialist's position. The team, however, is concerned that this process must be accelerated to the fullest extent possible so that the Project staff will have available, at the earliest possible date, an Evaluation Specialist to give direction to internal Project evaluation during the remaining two years of the Project. The importance of this concern and recommendation is highlighted by the team's comments in the Documentation and Evaluation section of this report which follows.

2. While the University at-large has allocated BDS$60,000 to the Project for addition of much-needed personnel, particularly in the areas of Language Arts and Maths, little of this money has been used. It is recognized by the team that there are problems in identifying and securing a qualified person (or persons), and that some steps have been taken to secure help on a consultative, part-time basis. However, the team believes it is urgent that steps be accelerated immediately to obtain additional personnel on a more permanent basis (1982-84) to assist in Project implementation.

   The team also suggests, in this connection, that some attention be given by appropriate administrators (in PEP, R and D, and IES) to find more creative ways to match available personnel with available resources. Open and free-wheeling discussions might yield new options and opportunities.

3. While an increased number of meetings were held on a fairly regular schedule involving personnel from the R and D Section, the Inservice Education Section (IES), and PEP, there is strong evidence to suggest that some participants (if not many) regard these meetings as largely perfunctory in nature, i.e., the reporting of information on Project activities and events. The team recommends that the expertise available in these meetings be capitalized on, particularly in the areas of planning and evaluation. More meaningful involvement of these persons in shared decision-making will increase the sense of ownership and responsibility of all persons concerned, and will emphasize - on a continuing basis - that the Project is indeed a School of Education project. The planning of agendas for these meetings might well involve inputs from the respective heads of R and D and Inservice.

4. It is clear that some faculty members, particularly those in the Foundations area of the R and D unit, feel that their expertise is not used fully in Project implementation. The team wishes to point out that expertise in the areas of social and psychological foundations can be used profitably in Project implementation. Such expertise can speak to the impact of cultural background on teacher and pupil behavior, the developmental characteristics of children of differing age levels, enhancing motivation in learning, nurturing self-concepts in learners, assessment of learning outcomes and of teacher and pupil behavior, to mention just a few areas which one typically associates with such expertise. It was also noted that the faculty members referred to also have had a considerable amount of classroom teaching experiences on which they could draw in making their contributions to PEP.

5. There is strong evidence of the need for an increased flow of clear communication within the SOE regarding Project implementation to eliminate misinformation and miscommunication. The flow of communication should be timely, i.e., in advance of meetings/interviews/conferences/workshops and in connection with follow-ups to those activities. Placing verbal agreements in writing will assist to reduce the possibilities of misunderstanding. Much of the information to be shared regarding Project activities already held can be done in writing thus freeing valuable time in group meetings for

more substantive activity. Organization theory makes clear that the more complex an organization is, the greater the need for a free and open flow of clear communication among its parts on a continuing basis.

6. While personality differences and conflicts are to be expected within any organizational structure, every possible step must be taken to assure that such differences and conflicts do not impede the achievement of common goals in an approved, agreed-upon undertaking. The implications here are self-evident.

7. The team wishes to comment on one additional matter. In our interviews with Cave Hill Campus faculty, it was mentioned by some that in a region where faculty members know each other and their areas of expertise on both a professional and personal basis, coordination of activity to achieve common goals is not important, if not unnecessary. Organization and administration theory is clear on this point of view, namely, that it is unsound to depend solely on personal and professional relationships to ensure effective operation of an organization. Turnover of personnel and shifts of emphases in individuals' expertise make it necessary to conduct the organization on a more dependable basis. This argument supports the need for coordination of activities on a more systematic basis.

Project Director. The Project Director, located at the Mona Campus, continues to provide strong leadership for the overall regional Primary Education Project. This was evidenced, not only by the regularity and frequency of communication between the Director and the Coordinator, but also by the fact that several visits were made by the Director to Cave Hill campus to assist and participate more fully in Project implementation.

Project Coordinator. The Coordinator continues to provide strong leadership in the implementation of PEP. Together with his staff, they have set a positive administrative tone in the territories for Project implementation. His role will become increasingly important during the closing two years of PEP. Certain comments in the University of West Indies, School of Education, Cave Hill campus sub-section (above) are relevant here.

Secretarial and Support Staff. A competent staff continues to provide good support for Project implementation. The contribution of the head secretary, especially, is worthy of mention. The staff is short in number for the increasing amount of materials production ahead.

The team suggests here that, if there are budgetary problems in adding support staff, the Coordinator give consideration to the possibility of securing volunteer assistance from the USA/Peace Corps and/or the British Volunteer Orgnaization.

Project Subject Specialists. Continuity in personnel is a strength. There has been some shift in role expectations in the territories for Subject Specialists to serve as teacher trainers. That is not to say that their role as curriculum developers is no longer an important function -- it continues to be so. The team notes the need for greater coordination as more persons are used to assist the Specialists in carrying out their responsibilities. This is evident already in the Language Arts area.

Consultants and Resource Persons. Competent consultants and resource persons have been used to assist in Project implementation, particularly in the conduct of regional and territorial workshops. Ways need to be found to use additional qualified persons who are available, and to use more frequently those who are now being used. The team notes that there is a substantial sum of money available in the Project budget for technical assistance on a short-term basis that barely has been tapped. More attention needs to be given to finding additional creative ways to match these available resources with Project needs.

As more and more persons become involved in Project implementation, the greater the need for coordination, as pointed out elsewhere in this report.

The UWI - Mona Campus. As already mentioned, the Project Director is the Dean of the University-wide School of Education and resides in Jamaica. Jamaica's involvement in the Project is, in effect, a separate component of the total Project and involves the training of administrators in that territory. As noted in the Training section of the report, this component is being conducted effectively by a team of very competent professionals. In addition, personnel from the Mona Campus serve as consultants for administrator training in other territories in the western and southern parts of the Caribbean region.

The US-AID Staff. Staff of the US-AID office who have responsibility for monitoring PEP provide strong support for Project implementation. They demonstrate positive support to ensure the success of the Project. On a continuing basis, they provide assistance to the Coordinator as needed for the implementation of the Project.

Project Implementation Officers (PIOs). With one major exception, (Antigua), there is continuity of personnel in the participating territories. There is evidence that their roles have become increasingly demanding during the past year. They are competent persons dedicated to the Project and its successful implementation. They are well-respected and well-known in their respective territories. The roles of the PIOs are critical to the success of the Project in the territories, and will become even more critical during the next two years. Some problems still remain regarding salary adjustments. For the sake of morale and for ensuring continued successful Project implementation, these problems should be ironed out as quickly as possible.

Project Implementation Units (PIUs). The PIUs provide forums for an exchange of ideas and for giving direction to the Project within the participating territories. Their memberships include educational leaders, e.g., personnel from the Ministry of education, PIOs, Subject Leaders, Project school principals and teachers, and staff members from Teacher Training Colleges. In some territories, PIUs function as a dynamic force in Project implementation. In others, the intended advisory role is yet to be developed. CEOs and PIOs in these territories should do whatever they can to strengthen the role of their PIUs.

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Chief Education Officers (CEOs). CEOs appeared to be more informed about PEP this year and they clearly evidenced, in a recent group meeting in Antigua, a high level of commitment to and involvement in planning for expansion of Project impact and extension of the funded effort. Generally, the PIOs felt more supported by the CEOs and there was substantial evidence that many CEOs were concerned about institutionalization of Project activities. During the Spring of 1982, CEOs were contacted formally by the team to obtain evaluative data about Project implementation. The results of this survey are included in the Documentation and Evaluation section of this report.

Territorial Subject Leaders (SLs). Their roles are becoming increasingly more important and expanded to include more responsibility for teacher training and evaluation. Project teachers depend heavily on assistance from the SLs. SLs report a high degree of responsiveness on the part of Project teachers to the help provided. In some territories, SLs will be attached next year to Teacher Training Colleges to assist with providing inservice education. The team notes that there is variation in the scheduling of SL visits to Project schools. In some territories these are conducted on a regular basis, in others much less regularly. There continue to be some problems in providing adequate support for travel. These problems should be ironed out as quickly as possible.

Project Schools: Principals. There is evidence of the training of principals in selected aspects of administration. (Details are presented in a later section of this report). There is need for more training in the areas of instructional leadership and evaluation. The support for PEP is generally very positive among Project School principals except in a few cases where the team observed apathy. Every effort should be made to develop and utilize the potential of principals in Project implementation, particularly in providing support and assistance to Project teachers.

Project Schools: Teachers. There is clear evidence that among many teachers interest in and enthusiasm for PEP curriculum materials continues to be strong, and in some cases is increasing, especially where there is continuity of effective personnel. Increased evidence of more effective teaching was observed. The need for much additional training still exists and there are problems resulting from a high turnover of teachers in some schools.

Teacher Training Colleges (TTCs). There is evidence that in some territories the relationship between PEP and the TTCs is increasing in importance and in positive ways resulting in mutual benefits. These linkages are important to ensure the durability of Project impact in the territories and should be encouraged/strengthened in those territories where they have not yet been established or where they are weak. There is evidence that PEP is significantly impacting on the nature of teacher training programs in the TTCs.

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Terrtiorial Curriculum Development Centres and Reading Centres. There is evidence that in some territories the Curriculum Centres and Reading Centres are relating more closely to PEP. In some, PEP is an integral part of the total effort to revise primary curricula with major responsibility assigned to the Curriculum Centres. PEP has been catalytic in the establishment of at least one new Reading Centre (St. Kitts), and plans are underway to establish one in Belize.

PAHO Linkage. There exists now a coordinated working relationship between PEP and the Pan-American Health Organization in the development of curriculum materials. Continuation of this relationship, including dissemination of health-related curriculum products, is anticipated during the next two years.

Project Newsletter. The Project Coordinator has issued the first in a series of Project Newsletters designed to share information among the participating territories regarding implementation of PEP. This new communication vehicle should prove useful in disseminating information about successful practices initiated under Project auspices.

The above review of the Project's administrative structure and its supporting ancillary systems and units illustrates clearly the complexity and comprehensiveness of the Primary Education Project. It makes clear why Project management is so important to the success of the Project. The achievements to date are significant and due in large measure to Project leadership and the contributions of key Project personnel. The team notes that during the next two years the scope of the Project will be expanded, and its complexity will increase, requiring a continuing high level of leadership and expanded roles of responsibility for Project staff and territorial personnel. The team believes that the implementation of the recommendations and suggestions incorporated in this section of the report will serve to strengthen even further the administration of this massive, regional undertaking which up to this point is operating so successfully.

## II. Documentation and Internal Evaluation

This section of the report contains two major parts:

A. An update on data collected and analyzed for baseline and formative evaluation purposes, and

B. An elaboration of the team's recommendations for specific modifications in the original evaluation design to ensure successful completion of essential evaluation procedures by Spring, 1984.

The team urges that this section (B) of the report receive highest priority with Project staff in the months ahead before attention becomes focused on the preparation of a proposal for Project extension.

### A. Data Collection and Analysis

The Evaluation Team Report, June 1981 (pp 21-22) succinctly describes the plan for the collection of baseline data for PEP. An updating status report prepared by the Project staff for the team, a summary of responses from CEOs to an external survey conducted by the team during the Spring of 1982, and salient observations and concerns derived from interviews and visits comprise the content of this sub-section.

1. Project Report on the Status of Baseline Data, March 1982

Most of the baseline data planned, with the exception of data on pre- and post- tests from pupils, have been collected, processed and in a number of cases reports are either prepared, in preparation, or will be completed shortly. The following are some of the relevant details.

1.0 Pupil data

1.1 Pupil attitude to school related matters.
Data collected and processed already.
A report on this is in preparation.

1.2 Pupil attitude and behaviour - teacher report.
Data collected and processed. Two types of reports have been prepared -

(a) Information sheets - feed back to individual terrtitories based on the data from that territory

(b) Overall reports based on data from all territories.

1.3 Pupil performance. The data from a diagnostic test in Language Arts are being processed.

1.4 Pre-post tests as units of materials are reportedly making a slow progress. Some territories have begun to administer these tests.

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2.0 Teacher data

2.1 Data on teachers' practices and perceptions have been processed and two types of report have been prepared -

(a) Two information sheets to each territory based on the data from the territory concerned.

(b) An overall report based on all data.

2.2 Classroom Observation data have been collected and are being processed.

3.0 Educational Administrators/Supervisors data

Data from principals and teachers have been collected, processed and two types of reports are in preparation but not complete.

(a) Information sheets to individual territories.

(b) Overall report based on data from all territories.

4.0 Territorial subject Curriculum data

4.1 The subject consultants are preparing baseline reports on the 4 individual subject areas.

4.2 It is planned to rate curriculum prepared using the curriculum evaluation guidelines devised.

5.0 Teachers' and Pupils' materials

The evaluation is based on feed back during Territorial and local workshops, and during school visits. It has been decided to include a feed back data form with each unit of new materials produced.

6.0 Project Activities

All project activities are evaluated using questionnaire and a report prepared.

7.0 Education system

Data on provision and allocation of teachers in the territories are being processed for information sheets and reports.

2. Survey of CEOs conducted by the Team, Spring, 1982

In addition to the above data collection reported by the Project staff, the team itself collected some data from the territories. A survey was mailed to all Chief Education Officers by the evaluation team to assess their perceptions of Project impact to date. Those responses (8 out of 10 were returned) were summarized and analyzed by the team. All CEOs reported the Project as having strong or very strong impact on the five pilot schools in their respective territories. Project impact on non-pilot schools was reported with greater variability two indicated little or no impact, three reported some, and three described the impact as strong. Of the Project components the CEOs were asked to rank order in terms of positive impact, all ranked the development of materials as first or second. Generally, the training of teachers and dissemination of materials were ranked second or third, followed by the provision of consultative help and training of administrators. Comments indicated all components were highly valued and of greatest concern to CEOs was the possibility of extending the Project past 1984 in order to serve more schools and program levels.

3. Salient Observations/Concerns

(a) There continues to be a lack of baseline data on pupil achievement. This is crucial to the overall documentation of PEP and immediate steps should be taken to get the data collection and analysis process underway.

(b) There is a need to move ahead as rapidly as possible in analyzing data collected and reporting results to appropriate individuals in decision-making positions.

(c) There continues to be a need to study the problem of quantity in data collection and analysis. Sampling designs are adequate. (See Section B below.)

(d) There is an acute need to press forward in training teachers, principals, and subject leaders in evaluation procedures. The team notes that this endeavor, when accomplished, should greatly facilitate the critical need for data collection and analysis.

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B. Recommendations for specific modifications of the original evaluation plan

As noted in the comments on the original evaluation plan, which is outlined in part one of this report, and in the observations and comments which are included in the preceding sub-section, some progress has been made in collecting and analyzing data in certain aspects of Project implementation. However, the entire process of documentation and internal evaluation is seriously behind schedule (for understandable reasons), and needs to be simplified and prioritized. For four reasons, the team is especially concerned about implementation of the internal evaluation process during the next two years:

1. We are confident now that the expectations of the original evaluation plan were too high given the restraints of personnel time and financial resources available for internal evaluation. Consequently, the present situation exists where the process is behind schedule in a number of areas. Lack of concentrating efforts on high priority aspects of internal evaluation have resulted in collecting less useful data than is needed to demonstrate real evidence of Project success. This problem was mentioned in the Team's 1981 Report.

2. Due to the unexpected, tragic death of the Project Evaluation Specialist, Mr. Frank Vincent, this situation is now more critical than before. While steps are underway to find a new person for this position, it will be some time - perhaps a year - before a new Evaluation Specialist can be employed and become fully acquainted with the Project and its implementation. Internal evaluation must continue during this interim.

3. The results of internal evaluation activities, particularly those which are detailed below, will be needed especially at the time of the terminal evaluation in 1984. The team's evaluative judgments about the extent to which the Project has achieved its objectives and the overall impact of the Project in the Caribbean region will have to be made, largely, on the basis of internal evaluation results.

4. If there is to be a proposal to US-AID for an extension of the Project beyond 1984, as now appears likely, the proposal will be strengthened proportionately to the degree that a sound evaluation design is in operation and results show real evidence that Project outcomes were achieved. Therefore, addressing the internal evaluation problem now and during the remaining two years of this Project will strengthen a proposal which may be forthcoming.

In view of the above, the team has given some thought to the prioritization of internal evaluation activities and to how they might be carried out. The overriding guideline is that, in the present circumstances, these activities must be carried on cooperatively: the Project can no longer depend primarily on one person to do the job. Strong leadership needs to be given by the Coordinator. Cooperation on the part of Project staff will be needed and expansion of the roles of the PIOs will be necessary.

Our recommendations for prioritizing internal evaluation activities follow

1. The quality (completeness and specificity) of reporting by Subject Specialists, Consultants and Resource Persons, and PIO's needs to be upgraded, and in some cases substantially so. What is needed more than descriptive reporting of what happened is evidence that what happened had some effect/impact on teachers and pupils. Evidence of effect is more important for evaluation purposes than is descriptive information. Some data regarding effect can be collected on site at the end of an activity; data are also needed to show effect over time. Steps should be taken immediately to upgrade the quality and consistency of reporting. The development of a reporting form with at least some common elements would be useful in implementing this recommendation. Reporting as used in this paragraph refers particularly to the documentation of workshops but to other Project activities as well. If the documentation of workshop impact over time (longer-range effects) becomes unfeasible for all workshops, a sampling of representative workshops should be made.

   On a semi-annual or annual basis, PIO reports should identify precisely which strategies have contributed most to the implementation of the Project, and what may have been the impediments or restraining factors.

   On an annual basis, the reports of Subject Specialists, Consultants and Resource Persons, and the PIOs should be analyzed and the results summarized for the purpose of showing Project effects.

2. On a semi-annual or annual basis, data should be obtained from all key persons involved in the Project to evaluate the utility of curriculum products, changes in teacher behavior, changes in pupil behavior, and changes in parental involvement which lead to enhancement of learning environments. The following matrix shows in graphic form what the team recommends.

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| Aspect | Evaluation inputs to show evidence of effect from | | | |
|---|---|---|---|---|
| | Subject specialists and Consultants | P I Os | Principals | Teachers |
| Evaluation of the utility of the curriculum products<br>- by subject area<br>- by level<br>- by type | | | | |
| Evaluation of changes in teacher behaviour | | | | (self-evaluation) |
| Evaluation of changes in pupil behaviour and achievement (See No. 3 below) | | | | |
| Evaluation of changes in parental involvement which lead to enhancement of the learning environments | | | | |

A common form should be developed soon to collect these evaluations from the individuals noted. Data collection could begin as early as this summer for curriculum products for 8-9 year olds, and for Project activities conducted during the 1981-1982 year.

Data from these evaluations should be analyzed and summarized on a yearly basis to show Project effects.

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3. The third recommendation treats the collection of data to show pupil achievement. This aspect, of course, is more complicated and likely will need to provide for more variability in its implementation. In any event, data are needed to evidence pupil achievement in Project classes.

One source of such data is the comparison of pre- and post-test results for individual units of work. It is unreasonable to expect data to be collected for all units of work taught. A representative sample for one year which takes into consideration subject area, grade level, and territory should be used for this purpose. Steps should be taken to develop the sample design and to begin collection of this kind of data which then should be summarized to show evidence of this dimension of Project effect.

A second source of such data is the results of term-end or year-end achievement tests. Teacher made tests reflecting the content taught in PEP curriculum materials should be administered. The results of the performance of Project pupils on such achievement tests will provide additional evidence to demonstrate Project effect. Again, the use of a representative sample of schools/classes is adequate.

A third source of such data is the results of standardized tests used in the territories. Comparisons between the performance of Project class pupils and non-Project class pupils could be made particularly in the subject areas of Language Arts and Maths. Again, the use of a representative sample of schools/classes is adequate. Participating territories should be expected to provide the raw data from which such comparisons could be made.

What is of paramount importance for this aspect of internal evaluation is central leadership, not only for constructing the design of the samples, but also for initiating and monitoring internal evaluation activities

4. The team wishes to suggest a fourth recommendation, though it is not regarded as having as high a priority as the first three. It emerges from a discovery through visiting the territories. There is some evidence to show that pupil attendance, punctuality, and courtesy are better in Project than in non-Project classes. Hard data were presented by two principals to substantiate this observation. A systematic collection and analysis of such data from Project schools might reveal significant findings to show Project effect. This involves analyzing data which Project school principals could provide to the Staff on an end-of-the-term or end-of-the-year basis. A few principals already are beginning to make an analysis of this kind of data for their schools.

What the team has attempted to do in sub-section B of this section of the report is to highlight the priority areas for internal evaluation activities. The team believes that these rather specific recommendations will simplify the overall task of internal evaluation and, if implemented, yield the kind of evidence most needed to show Project impact and effect at the time of the terminal evaluation in 1984.

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## III. The Curriculum Development Process, Products, and Dissemination

In this section of the report, team findings will be updated with regard to (a) the curriculum development process, (b) evaluation of the products to date, (c) evidence of Project impact and potential, and (d) the past and future dissemination of products. Particular attention will be given lastly to the evidence of progress made in response to the specific recommendations and concerns delineated in the 1981 report, pages 30-33.

### The Curriculum Development Process

Evidence generally continues to be very positive regarding the effects of the curriculum development process on (a) teacher interest in the PEP materials, (b) teacher preparation for effective use of the products, and (c) the quality of the curriculum materials. Subject Matter Specialists (SMSs) reported in interviews that the process has been significantly affected by the discovery that teachers generally need much more help than was anticipated during Project planning. The high percentage of untrained teachers with very limited educational backgrounds in some territories has altered the process to focus much more attention on developing teacher knowledge and understanding of subject matter required for effective use of the curriculum, and to direct more time and effort than anticipated to the training of teachers in basic pedagogy. That attention in the process has been described elsewhere in this report in terms of (a) the expanded roles of Subject Leaders (SLs) as consulting teachers and (b) the increased provision of local workshops designed by Project Implementation Officers (PIOs) and SLs to meet specific needs identified. SMSs reported that PIOs have provided teachers with excellent reinforcement and follow-up to workshops.

The development of curriculum materials has been achieved on schedule. Core Curriculum Outlines (syllabi) and Teaching/Learning Experiences (teachers' manuals) have been developed through Level III (ages 9-10) for all subject areas. Tests (diagnostic and achievement) have been constructed for the three levels in Maths, Science and Social Studies. Supplementary teaching materials have been produced also (e.g., Maths worksheets, Science Work-cards, Language Arts reading resources). Revised forms of the Level I (ages 7-8) materials evidence significant improvement over earlier drafts where substantial revisions were recommended (e.g., Language Arts in which lessons were more systematically sequenced and edited to increase clarity). Final revisions also contain refinements by the SMSs and SLs (e.g., the removal from early level materials of conceptual content found to be too advanced for the development characteristics of the pupils). Furthermore, the first and second drafts of materials for Levels II and III in Maths, Science and Social Studies evidence a continual refinement of the materials that suggests also the refinement of a fundamentally sound developmental process.

In summary the evaluation team continues to regard the process as an excellent model for curriculum development. Additional resources, however are needed to adequately provide for the teacher training dimension of the process, especially in Language Arts and Maths.

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## Evaluation of the Products to date

In the judgment of the evaluation team, the curricula developed for Level III (9-10) this past year in Mathematics, Science and Social Studies have been excellent. Improvement has been noted in the Language Arts materials but, in comparison with the other curriculum areas, they appear underdeveloped.

Four notable aspects of curriculum development contributed significantly to the team's judgment that the Maths, Science, and Social Studies curricula are of excellent quality. First, leaders in each area are systematically developing the curricula materials based on a predetermined scope and sequence of instructional objectives that will result in the sequential development of knowledge and skills in the learners. Secondly, tests have been developed and disseminated to encourage teacher evaluation of student learning. Third, the teachers' manuals include considerable background information pertaining to the subject matter, specific guidelines and steps for the teacher to follow, and other preparatory assistance for teachers. Although teachers and subject leaders continue to indicate that more explanations of the content and guidelines for implementation are needed, the team commends the SMSs and the assisting SLs for excellent responses to that need. Similar supportive help to teachers needs to be added in Language Arts guides. The fourth distinctive characteristic of these excellent materials is in their attention to the development of higher levels of thinking, especially in Science and Social Studies. The curriculum materials are outstanding in their use of activities involving forecasting, estimating, evaluating, analyzing, synthesizing, thinking critically and creatively, and experimental problem solving. We would also note the exceptionally fine language development activities incorporated in the Science and Social Studies curricula. A brief report of findings in each curriculum area follows.

## Language Arts

There is much evidence that teachers have been meaningfully involved and influential in the curriculum development process for Language Arts. Their input has significantly influenced the materials developed. For example, in response to teacher requests, a resource book on reading instruction (ages 6-9) was developed through a regional workshop (Antigua) April 1981 and disseminated, it has been praised by teachers and administrators as meeting an acute need. A different example is the apparent resolution of the earlier controversy over content emphases. Most teachers and administrators now report they believe the Language Arts curriculum will be appropriately balanced between oral language development and reading. Another example is the extent to which requests for help with the problems of dialectal interference in the acquisition of Standard English speaking and reading skills continue to shape curriculum development in Language Arts.

The team regarded the revised Levels I and III (7-8/8-9) products as improved over first drafts. Supportive help to teachers does need to be expanded (a) to provide more relevant background information on content and pedagogy, (b) to include diagnostic and achievement tests plus guidelines for evaluation, and (c) to define a scope and sequence of skill development through the primary school years. The team again encourages the Language Arts team to help teachers see the opportunity to reinforce and extend the Language Arts curriculum through the many language activities contained in Science and Social Studies - e.g., describing, defining, dictating, stories, sequencing, etc.

The development of supplementary reading materials at territorial and local workshops, the cooperative assistance of the Pan-American Health Organization (PAHO) with supplementary health readers, and the production of the Teacher's Resource Booklet (Reading, 6-9 year olds) are commendable and successful efforts to be responsive to expressed needs. However, such activities should not prevent the full completion of the basic PEP curriculum materials: i.e., development of tests, evaluation guides, and resource materials/teacher helps in the manuals. The team again stresses the urgent need to employ additional staff to assist in Language Arts, preferably with expertise in reading. More collaborative planning and evaluating among the professional team (SMS and resource persons) is strongly recommended also to facilitate the successful completion of the total set of curriculum materials and to provide more systematic training in the use of the materials.

Mathematics

Materials for thirteen units of instruction were reviewed: graphs, number concepts, length, geometry, sets, time, capacity, money, fractions, operations, shapes, expanded notation and place value, and counting. Tests and worksheets accompanied separately the manual for Teaching/Learning Experiences. It is suggested that the entire curriculum package be bound in one document for teacher use even though tests and worksheets will be maintained separately also for duplication purposes. It is also suggested that the content of the manuals be more consistent in introductory and supportive information provided to the teachers. Specifically, the team recommends adding the 7-8 Introduction to the 8-9 and 9-10 manuals; adding a description of the curriculum scope similar to the 8-9 guide to the 7-8 and 9-10 manuals; and adding the 8-9 guidelines for working with slow and gifted students to 7-8 and 9-10 manuals.

The document titled, Constructing Classroom Tests in Mathematics, reflects a seemingly thorough Montserrat workshop on testing - diagnostic and achievement. The team hopes a similar workshop is available to all Project teachers. It might be helpful if Maths objectives were identified in the manuals according to levels of learning, as used by James Halliday in the workshop, and also if more emphasis were placed in the workshop on the value and use of pretests.

Science

Materials for teachers and pupils were reviewed for units on matter, musical instruments, time sequence, magnets, heat, time, measurement, water, rocks and soils, machines, sound, light, living things, weather, energy and forces. These materials are very strong in their systematic development of concepts moving from the simple and known to the more complex. Workcards of fine quality have been constructed to accompany the tests as aids to the teacher. Of special value to teachers has been Improvisations in Science, a guide to the simple and low cost construction of materials for teaching Science. Teacher help in the guide included alerts to complementary content in Maths (e.g. Measurement and Time). Similar alerts should be made wherever appropriate to help the teacher relate the lesson to complementary content in Language Arts and Social Studies.

Social Studies

Last year the team regarded the 8-9 guide in Social Studies as an exemplary model and questioned whether continued production of such comprehensive guides would be a reasonable expectation. The team found the 9-10 guide equally outstanding in pedagogical quality and in background information for an even more complex area of subject matter content. Once again, the team suggests the products in this area serve as a guiding model.

It would seem beneficial to have the final curriculum products in each subject area organized systematically into a single bound document in each level similar to Social Studies. Introduction, Aims (we would note the delineation of aims pertaining to knowledge and understanding, skills, attitudes and values), the Core Curriculum (sequence of topics), Teaching/Learning Experiences (sequence of units), Suggestions for Evaluation Procedures, and Teacher Resource Materials. We also recommend comparable organization of the Curriculum Core and the Teaching/Learning Experiences to include the identification of organizing concepts, generalizations to be developed, specific behavioural objectives major content ideas, pupil skills to be developed, and steps for teachers to take in preparation. The single document provides the teacher with a comprehensive guide to teaching Social Studies for the year.

The SMS is to be acknowledged for her excellent workshop designed to assist Montserrat with preparation to teach its territorial history. In this subject area, level II (8-9), the syllabus required each territory to develop its specific curriculum content to teach pupils about the territory in which they live. That content obviously placed an additional workload on the SMS.

Summary

The evaluation team found evidence that steady progress was made during 1981-82 in all areas of curriculum development Language Arts, Maths, Social Studies, and Science. The quality of materials are regarded as excellent in Mathematics, Science, and Social Studies with the last providing an exemplary model, in the judgment of the team. More guidance in the use of the materials has been provided by SMSs and resource persons including help in developing timetables or schemes and in using the materials more flexibly.

Suggested Examples of Project Impact and Potential

This section contains a selected list of examples of evidence of Project impact to date or of potential Project impact. The list is in no way exhaustive of notable findings.

1. In St. Kitts a Remedial Reading Centre was established in order to more effectively implement Project material with slower learners. It is exemplary in its structure and the quality of services provided.

2. In Belize there is a high degree of integration among the programs and functions of the Ministry of Education and the Primary Education Project. For example, the Curriculum Development Centre has become integrally involved in the dissemination of PEP materials.

3. At Georgetown School in St. Vincent, the implementation of PEP curriculum has led to the development of team teaching 3 days per week for Language Arts, Maths, and Social Studies.

4. A principal in St. Lucia reports that his school was "revolutionized" as teachers at the higher levels helped teachers at the lower levels and in so doing became inspired to make comparable changes in their teaching and curriculum prior to official involvement in the Project.

5. Throughout the territories teachers report remarkable growth in the thinking abilities and enthusiasm of pupils for PEP learning experiences.

6. Some untrained teachers were found to be functioning effectively with groupings in subjects and individualizing learning experiences as a result of following the PEP guides and participating in Project workshops.

7. Several territories have begun to develop reading materials designed specifically for their children.

8. PEP curriculum materials are becoming widely used in Teachers' Colleges.

9. In one Project school in St. Vincent, Project teachers cooperated in taking the 30 pupils in their classes on an extended field trip to the Airport, the first ever for the school. Appropriate spin-offs resulted in Language Arts and Social Studies classes.

10. Several principals began to prepare Level III (9-10) teachers through staff meetings and direct assistance in advance of the Project schedule. This advance planning was percieved as evidence of high administrative commitment and involvement in the PEP process.

Dissemination

Concerns about production costs and time have persisted this year, magnified by the volume of materials produced for three levels of teaching. One can only expect the problem to become more severe unless additional staff and/or methods of duplication are found. Several territories reported shortages of materials received (i.e. less than the amount ordered) and delays in delivery so that workshop participants did not have time to review the materials in advance of the workshop.

Perhaps the greatest hope regarding this need for more efficient dissemination is in the increasing effort within territories to contribute local resources toward the solution. The evaluation team members, in their visits to the 10 territories, heard many preliminary discussions of local efforts to find a way to duplicate and distribute Project materials to non-Project schools and to disseminate materials in the subject area not chosen to be part of the Project. Serious consideration was given in these conversations to the development or expanded use of territorial curriculum materials centres. Leaders in several territories also expressed a willingness to employ Project consultants/resource persons with local funds in order to provide teacher training in the use of the materials in non-Project schools.

In relation to dissemination of products, there seemsto be an observable spread effect of Project impact occurring in a number of ways. As has been stated, the team found substantial evidence that Project materials were often disseminated to non-Project teachers and sometimes those teachers were included in PEP workshops. Another spread effect noted earlier occurred as a result of the PEP materials becoming widely used in Teachers' Colleges, including in the classrooms used as field sites for practice teaching. (In Antigua some Teachers' College students even are doing research on the effectiveness of Project materials as part of their field work.) A third example of spread effect has occurred through a regional Science advisor, Michael Ratcliffe, who is now using PEP Science materials as a basis for training teachers and has taken the PEP curriculum materials to several territories not related to the Project.

The team wishes to comment on another aspect of Project impact which has potential for longer-range effects of a more general nature. Pupils in the region are developing understandings and skills which ultimately should have pay-off in terms of the reduction of unemployment levels and increase in productivity. Objective indicators of this impact cannot be available until much later, perhaps 8 to 10 years. However, the fact that pupils are now beginning to develop significant understandings through Social Studies of their families, communities and territories; to develop higher level thinking skills through Maths and Science, and to develop improved oral and written communication skills through Language Arts, all point to the conclusion that in time they will become more productive citizens in their respective territories.

The evaluation team was impressed by the degree of spread effect occurring in only the third year of the Project.

Progress on 1981 Recommendations and Concerns

1. Significant progress has been made in some territories with regard to understanding the potential relationship of PEP curriculum to other curriculum requirements and materials in the territories, There was mention in many territorial visits of integration and complementary use of a number of curriculum resources. Examples are Mr Ratcliffe's integration of PEP materials into the basic Science curriculum for St. Kitts and Antigua, and the territorial plans of CEOs in Belize and Dominica.

2. There was no evidence that SMSs had begun to prepare composite descriptions of the scope and sequence of learning experiences in levels I-IV so that teachers will know in each subject the total primary education curriculum and what children are expected to learn before and after their year with them.

3. There was an accelerated effort in test development this past year accompanied by growing teacher resistance to the use of pretests. More teacher preparation in the use of tests, particularly for diagnostic and grouping purposes, needs to occur.

4. Only in the Maths curriculum were guidelines found on how to group pupils and individualize instruction to meet specific learner needs. Those Maths guidelines could be much more developed, particularly to help teachers see the value of diagnostic testing and to understand the various modifications recommended in teaching strategies (e.g., task analysis, providing enrichment, etc.). Similar guidelines need to be included in all subject area guides.

5. The Science curriculum explicitly acknowledges complementary relationships between Maths and Science units. It is not at all evident that Language Arts teachers are aware of complementary opportunities to develop language and reading skills in Science and Social Studies curricula. Recommendations to the teachers that they intentionally integrate content across subject areas need to be included in all guides.

6. Some impediments to Project implementation reportedly were removed by Ministries of Education in several (but not all) territories - especially, release of teachers and compensation for travel costs. Lack of adequate space and supplies as well as high teacher-pupil ratios remain problematic in most territories.

7. PIUs in most cases were convened once a term though the agenda involved more progress reporting than meaningful involvement in decision-making, according to participants. However, some PIUs are becoming extremely influential and productive in their advisory capacity.

8. A serious problem remains with the lack of appropriate materials available to teachers, especially in Science and Social Studies. This lack of support has discouraged some teachers in their attempts to implement the curriculum. The Science document, Improvisations in Science, is a very significant product addressing this problem area.

9. More territories found it possible to release teachers all or part-day in workshops. No territory now reports release of teachers for workshops as categorically impossible.

10. The role of SLs has been expanded and all territories now release them to serve as consulting teachers. In at least one case (Belize), an additional teacher is assigned to each Project school where a regular faculty member serves as a SL.

In summary, significant progress was made this year on more than half of the 1981 recommendations. The team encourages Project implementers to continue to attend seriously to all 10 recommendations and continue to make progress regarding them.

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The development of these materials is noteworthy and it should encourage other educators in the region to concentrate their efforts and expertise on developing other needed resource materials for training. The team notes that two of the three above-mentioned persons are Project Implementation Officers.

2. There continues to be the need to give more attention to coordinated and collaborative planning among resource persons in determining workshop content, in Language Arts in particular, and in other subject areas in general.

3. There is the need to give increased response to territorial needs in workshop content and activities, e.g., teaching skills in remedial/ developmental reading, assistance with Science materials, skills in dealing with dialectal interferences, training of consulting teachers, and, possibly, assisting teachers to develop skills to work more effectively with the mental and physically handicapped students in regular classrooms.

4. There is also the need to conduct specially designed local workshops to assist new pilot teachers - replacements as a result of resignations and transfers - to become more knowledgeable about the implementation of PEP, and to develop necessary skills.

5. There continues to be the need to work on developing strategies for improving attendance at territorial workshops where it is poor. It is recognized that this creates problems for principals to replace teachers, but the matter should be given special consideration.

6. Workshops are being conducted in keeping with the established schedule.

B. Training of Administrators

The Project Document, page 28, states "... an essential element in improving the learning environment is the efficiency and effectiveness of the key leadership staff in carrying out their leadership function ...". In keeping with the letter and spirit of the above statment, a series of workshops have been held for administrators of PEP pilot schools in each of the territories. The team notes that these workshops are of two different types. In Jamaica, the workshops are conducted during the summer for a four-week period. They are competency-based and focus on the problems associated with leadership in the Jamaican primary schools. Systematic follow-up is provided through the conduct of seven seminars and on-site visits. In all other territories, training was provided through one-week workshops.

The selection of content for the training workshops for administrators is made from a cooperatively developed program outline and includes topics on administration, human relations, implementation, decision-making, organization, supervision, leadership, management and communication.

Salient Observations/Concerns

1. The content of these training workshops, as revealed by the evaluation data from participants, reflected the important elements of quality, timeliness, and relevance.

2. There was sufficient evidence to indicate that emphasis was placed on assisting administrators to break away from preoccupation with the status quo and administrative trivialities and, instead, raise substantive dialogue toward improving leadership skills as efficient and effective change agents.

3. There is some evidence that greater emphasis should be placed on workshop activities to assist administrators to become more skillful in evaluation procedures and curriculum development.

4. There is need to develop a systematic follow-up design to measure training impact in all territories (excepting Jamaica) where such is well in place and operating effectively.

5. There is a need to gather and analyze empirical data on workshop effectiveness giving attention to the identified needs of individual administrators.

- There is much evidence to indicate that coordination and collaborative planning are common practices in training activities across the region.

C. Educational Planning

The evaluation team views the educational planning component of PEP as the central vehicle to assist in building strong and viable educational systems in the territories. The team found some evidence to suggest that more than cursory efforts have been made in the area of educational planning during 1981-82.

One activity, described in the June, 1981 Evaluation Team Report, page 21, sets the stage for focusing on substantive future issues/concerns about the need and direction for educational planning. On several occasions since the initial activity, a small resource group has been working to develop a detailed operating proposal to provide training for educational planning suitable to all constituencies. Attention was given to the suitability of this plan to fall within the framework of the funds available for this purpose.

The team notes that the PEP Coordinator has set in motion a mechanism to obtain input/feedback from CEOs on the approach before submitting a formal proposal. (See Appendix No. 2, a memorandum dated 1982-05-07, from Dr Leonard Shorey, Project Coordinator to CEOs, for more detailed description.)

The evaluation team strongly endorses the fundamental concept of the proposed underlying objectives and procedures envisaged so that the important component of educational planning can be implemented successfully.

Salient Observations/Concerns

1. There is a need to move ahead with plans to formalize a comprehensive plan of action for the educational planning component of PEP.

2. This action plan (No. 1) should address the conduct of an assessment and analysis of territorial data needs, and the organization of a central information base for decision-making purposes in educational planning.

## V. Looking Ahead

### A. To the Terminal Evaluation, 1984

Based on the evaluation team's experiences in conducting the external Project evaluation for years 2 and 3, we have given considerable thought to how the final evaluation in 1984 might be organized and conducted to accomplish the important task thoroughly, accurately, and efficiently. It is our concern that the scope of the review will be significantly larger due to the lapse of two years of Project activity during which production of materials and internal Project evaluation activities (i.e. data collection and analyses, documentation) are expected to be expanded and accelerated. Drawing from our experiences with other external program reviews, we have formulated some recommendations to facilitate the final evaluation visit.

We recommend that:

1. Considerable advance planning occur for the 1984 team visit -

   (a) that the Project staff begin immediately to plan for the documentation and organization of "evidence to us" that will facilitate the team's review of Project accomplishments. The recommendations made by the team under the Documentation and Internal Evaluation Section of this report are intended to guide that process.

   (b) that the evaluation team hold a 3-day planning session (in Gainesville, Florida), if it is to be the same team, during the early fall of 1983. The purpose of the session would be to prepare guidelines for the final preparation of the May-June visit. Specific suggestions would be transmitted to the Project staff, especially the Coordinator, regarding, (a) arrangments for territorial visits, (b) preparation of a final report documenting Project outcomes established through internal evaluation procedures, (c) organization of gathered data, and (d) the preparation of a master schedule of team members' activities to be disseminated to all persons involved in the review no later than March 1984.

2. At least four weeks be allowed for the team visit with the first two weeks involving individual visits to the territories visited in 1982 and the last two weeks divided between (a) study of evidence items and interviews, and (b) preparation of the report. A specified period of time in the schedule should be allocated for conducting visits and interviews in Barbados. Most of the final week should remain free to allow time for team consultation, writing, and editing.

3. All "evidence items" (i.e., curriculum materials, reports, data summaries, etc.) be placed in one room at the University in which the team members may work. Evidence files clearly labelled may be the most useful way to organize the material to be reviewed.

4. Secretarial assistance be made available to team members during the writing phase of the visit.

## D. Toward the Possibility of an Extension

The evaluation team encourages the UWI School of Education to apply for an extension of time in order to complete the original goal of disseminating the curriculum materials to all schools in the territories involved. The critical factor of teacher training to accompany that dissemination has become increasingly evident during the first three years of the Project. Therefore, we suggest that a request for extended time focus on widespread dissemination and teacher training, plus the continued training of administrators, with emphasis on completing the institutionalization of the Project impact within each territory. Extension of Project activities to other instructional levels is an appropriate plan we support if funding is available for another 5 years.

The team recommends that Project staff begin the work toward a proposed extension by establishing solid evidence of PEP impact on student achievement and ultimate employability, a more general outcome desired by USAID. Secondly, the proposed extension must be well conceptualized and carefully planned, particularly with regard to production and dissemination costs and to availability of needed personnel. Third, strong support for the request must come from the territories involved with guarantees of Ministry support to increase the durability and scope of Project impact. Plans for territorial institutionalization of the Project (i.e. mechanisms and support for ongoing curriculum revision and teacher training to upgrade primary education) would be most helpful in strengthening the proposal. The anticipated impact of loss of US-AID funding to these territories also might be persuasive.

BEST AVAILABLE

## VI. Conclusion

The team, which this year had the opportunity of visiting all 10 of the participating territories in the Caribbean region, consistently has found that the PEP has had remarkable positive impact during the first three years of its existence. As one would expect, this impact has increased noticeably during 1981-1982. The Project is well known throughout the territories and is credited, not only with sharpening the awareness of the need, but also with generating increased enthusiasm for cooperative efforts to upgrade primary education in the Caribbean. A strong commitment to upgrading primary education in the territories appears to be evolving among an increasing number of decision-makers and key professionals.

The curriculum materials produced by the Project were found to have had a significant positive impact on improving primary education in the pilot schools, and promising of having a similar impact on all primary schools in the region if they are disseminated widely and accompanied by training.

Training activities conducted for teachers during the third year have given more attention to addressing the needs of participants. More persons (e.g., principals and non-Project teachers) are taking advantage of training opportunities. There is a noticeable improvement in the training of administrators both in terms of number of opportunities and in program design and content.

While it is not the purpose of this concluding section to summarize the team's concerns and recommendations which are incorporated in the body of the discussion section, the team wishes to highlight those problems which we believe pose the most serious challenges to the Project's effectiveness during the next two years.

The first major problem is in the area of personnel, as related to:

- filling the vacant position on the staff -- Evaluation Specialist
- securing additional personnel to assist Subject Specialists, especially in Language Arts and Maths
- securing more technical assistance on a short-term basis to assist in such areas as materials production and dissemination to Project schools, internal evaluation, cost-effectiveness study of wider dissemination of curriculum products, educational planning, and in the conduct of workshops, etc.
- the addition of office support staff.

Attending to the implementation of these recommendations should be given highest priority by the Coordinator. His responsibilities will become even heavier during the next two years, especially in the absence of an Evaluation Specialist, and as the Project expands its scope of operation. The need for adding personnel now is critical. The possibility of staff burnout (as pointed out in the 1981 report) still exists. In the team's judgment, the securing and orchestration of personnel may be the single most important task of the Coordinator during the next two years. Fortunately, the availability of financial resources to secure personnel is not a problem.

The second major problem area is the documentation and internal evaluation of Project implementation.

This problem exists for understandable reasons and is delineated in Section II-B above. In essence, it involves the collection of real evidence of Project effect. Such evidence is needed at the time of the terminal evaluation and to support a proposal for Project extension.

The team notes that until such time as an Evaluation Specialist is employed and oriented, it will be the responsibility of the Coordinator to provide leadership and direction for internal evaluation. In recognition of this circumstance, and of the fact that the expectations of the original evaluation plan were too high, the team has included specific recommendations for conducting internal evaluation activities during the remainder of the Project.

In closing, the team conveys plaudits for the exceptional accomplishments of the Project administration, the outstanding quality of leadership throughout the Project, the excellent curriculum materials produced, and the notable spirit of perseverance and dedication prevailing among Project implementers throughout the territories. The team is confident that US-AID will find in 1984 that the investment has produced significant impact far exceeding expectations held in the original proposal.

> The team made similar comments in the concluding paragraph of the 1981 report. This year we began by questioning our findings in that report. We end by validating them with even more confidence than we had last year.

# APPENDIX NO. 1

## SUMMARY OF THE INTERVIEWS AND VISITS CONDUCTED BY THE EVALUATION TEAM - 1982

| NO. OF PERSONS VISITED/ INTERVIEWED; OTHER | | J'CA | BVI | B'DOS | ANT. | ST.K. | ST.L. | ST.V. | MONT. | DOM. | BEL. | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ministry of Education | Minister of Education | | 1 | | 1 | 1 | 1 | | | 1 | | 5 |
| | C.E.O. | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 10 |
| | Other | | 1 | | 1 | | 3 | | | | | 5 |
| P.I.O. | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 9 |
| Pilot Schools | Number | 4 | 5 | 0 | 5 | 3 | 2 | 2 | 2 | 2 | 6 | 31 |
| | Principals | 4 | 5 | 2 | 5 | 3 | 2 | 2 | 2 | 2 | 6 | 33 |
| | Proj.Tchrs. | 16 | 20 | 4 | 14 | 10 | 6 | 7 | 4 | 8 | 17 | 106 |
| Subject Matter Leaders in TERR. | Lang. Arts | | 1 | | 2 | 2 | 2 | 2 | 2 | 1 | 2 | 14 |
| | Maths | | 1 | | 2 | 1 | | 1 | 2 | 1 | 2 | 10 |
| | Soc. Studies | | 0 | | 2 | 0 | 2 | 2 | 2 | 1 | 2 | 11 |
| | Science | | 0 | | | 1 | 2 | | | | | 3 |
| Teachers and Principals in Non-Project Schools | | | 2 | | 1 | 1 | | | | | 1 | 5 |
| Classes visited in Project Schools | | 16 | 18 | 0 | 12 | 8 | 6 | 6 | 4 | 6 | 18 | 94 |
| PIU Meetings | | | 1 | | 1 | | 1 | | 1 | | | 4 |
| Territorial Workshops | | | | 1 | | | | | | | | 1 |
| Tchr.Tr.Colleges | | | | | 1 | 1 | | | | 1 | 1 | [illegible] |
| Teacher Training College Fac./Admin. | | | | | 3 | 2 | | 1 | | 6 | 1 | 13 |
| U.W.I. Fac./ Admin. | Mona Campus | 6 | | | | | | | | | | 6 |
| | Cave Hill | | | 11 | | | | | | | | 11 |
| PROJECT STAFF | Director(J'ca) | 1 | | | | | | | | | | 1 |
| | ViceDean(B'dos) | | | 1 | | | | | | | | 1 |
| | Coordinator | | | 1 | | | | | | | | 1 |
| | MATHS Spec. | | | | 1 | | | | | | | 1 |
| | LANG.ARTS Spec. | | | 1 | | | | | | | | 1 |
| | SOC.STUD. Spec. | | | 1 | | | | | | | | 1 |
| | SCIENCE Spec. | | | 1 | | | | | | | | 1 |
| US-AID STAFF | | | | 1 | | | | | | | | 1 |
| OTHER: | T.V. broadcast | | | 1 | | | | | | | | 1 |
| | Radio " " | | 1 | 1 | 1 | | | | | | 1 | 4 |
| | CXC personnel | 1 | | | | | | | | | | 1 |
| | Cur.Dev.Cntrs. | | | | 1 | | | | | 1 | 1 | 3 |
| | Reading Cntrs. | | | | 1 | 1 | | | | | | 2 |
| | Presentations to PIU Meetings | | 1 | | 1 | | 1 | | 1 | | | 4 |
| | PAHO | | | 1 | | | | | | | | 1 |
| | Presentation to Rotary Club | | 1 | | | | | | | | | 1 |
| | Presentation to a meeting of | | | CEOs----1---and Ministers in territories | | | | | | | | 1 |

NOTE: There will be some slight overlap in the figures since some persons occupy more than one position.

APPENDIX NO. 2

UWI/USAID PRIMARY EDUCATION PROJECT

MEMORANDUM

From: Leonard Shorey, Project Coordinator

To: Chief Education Officers attending PAG Meeting, May 1982

Date: 1982-05-07

Subject: Educational Planning - Proposals

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Background

1. Funding for the USAID Primary Education Project provides for use of some US$100,000 to assist territories in developing their educational planning capacity.

2. At a meeting of the University Advisory Committee re the School of Education) in 1981 some general approaches with respect to possible activities were considered by the several Ministers of Education then present. One of the activities considered desirable was that of providing attachments, and various Ministers indicated, in principle, the willingness of their Ministries to offer assistance or the interest of their Ministries in receiving assistance of this kind. There was also general agreement on the desirability of other activities focusing more directly on providing training in a "structured" situation.

3. Following this meeting and with the assistance of CDB, IADB and the Ministry of Education and Culture, Barbados, a two week Seminar/Workshop was held in Barbados with its major focus on School data (enrolment, projections from birth rates, etc.) and their use in planning, especially in relation to school provisions (buildings, staffing, etc.).

4. On several occasions since then a small resource group has been working on developing a detailed proposal for a programme in Educational Planning that might be mounted within the general framework of the funding available for this purpose. The group is now at the stage where, before finalizing and submitting a formal proposal, it would like to get some feedback from CEOs on the approach envisaged.

5. Outlined below are the major concerns, objectives and procedures envisaged.

A. Basic Principles

Educational Planning to facilitate:

(i) Overall national and human development in the participating territories.

(ii) A more equitable distribution of opportunities for individuals in education as well as in other areas such as the economic and socio/cultural life of the countries.

(iii) Economical and effective use of human and other resources.

B. The Context

Most Caribbean territories are likely to need assistance in developing their educational planning capabilities, more especially as many of them are unable, because of size and limited financial resources, to establish and maintain a full time Educational Planning Unit or equivalent body. In most cases therefore educational planning is but one of the tasks which may fall to one or more officers of the Ministry and even over a relatively short time span this responsibility may shif from person to person.

In such a situation priority consideration should desirably be given tc

(a) ensuring that a number of persons in the Ministry and school system receive some exposure to and gain some knowledge and understanding about educational planning.

(b) ensuring that such exposure provides as well for acquisition and exercise of relevant skills (i.e. a purely theoretical approach would be undesirable). In connection with the above it would be a matter of prime importance that attention be given at an early stage to what might at first appear to be very elementary matters (such as focusing on the actual realities within the education system concerned) since it might be unwise to assume that all persons likely to be involved in the training programme will have a really thorough understanding of these.

No less important would be the necessity of seeking to "lock-in" to such an exercise persons whose base may well be outside the Ministry of Education (e.g. in the Ministry of Finance) but who by their very very functions and responsibilities are likely to have useful and relevant insights and whose involvement is likely to ensure concrete realization of the fact that educational planning exists and must be carried out within inescapable constraints not of an essentially educational nature.

In sum there is need for a programme of training whose major thrust is educational planning but which is not narrowly prescriptive. Such a programme would not aim at producing "the educational planner" for a country but rather would seek to provide a country with a cadre of persons able, at short notice, to function knowledgeably in what is basically educational planning even though the activity may not normally be perceived as such. The local education system would, in every case, be the main focus of consideration and the chief area of study by participants in the programme.

C. Objectives

The overall objective of the programme would be to increase the level of awareness, understanding and skills of persons currently involved, or likely to be involved in educational planning.

More specifically the programme would seek to develop/enhance skills and insights so as to:

(i) Increase significantly the competence of person(s) responsible for or directly engaged in educational planning so as to enhance the efficiency and effectiveness of such planning and to enable them, where appropriate, to advise policy makers with greater confidence and competence and, generally, to support and facilitate national development.

(ii) Identify the planning needs and problems of the Caribbean with emphasis on own territories in particular.

(iii) Plan all levels of education (i.e. for all education sections) consistent with national development needs taking into account economic constraints and human and other resources, and to do this on the basis of sound educational principles.

(iv) Establish/modify education planning procedures designed to orient all persons in the education systems to the "plan" and to their role in its successful implementation, through appropriate strategies for various sets/groups of persons in the system. A major purpose would be to encourage persons at several levels in the system (e.g. Education Officers, Principals, Classroom teachers) to be prepared for and to accept a role in educational planning through

(a) understanding the planning process;
(b) providing feedback needed for effective planning;
(c) undertaking intelligent implementation of the plan devised.

D. A crucial aspect of what is envisaged are the strategies proposed to achieve the objectives stated. These are:

(i) Workshops

These would be multi-purpose activities intended to develop skills and insights through theoretical analysis and practical work, thus sensitising participants to the generality of problems confronting persons involved in

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educational planning especially in the Caribbean context. They would draw heavily on data already available (in Sector Studies which have already been carried out and whose findings are available to the respective Ministries) and would use the case-study as an integral component. They would thus ensure that participants "keep their feet on the ground" and examine and apply their skills to contemporary real-life situations. Collection, analysis, interpretation and presentation of data would be central to their functioning.

(ii) Survey of planning problems and needs

It is intended to direct attention to day-to-day problems and needs within a given system in the context of long-term considerations, as a means of helping territories improve their "planning capability". This aspect of the programme would seek to ensure that participants actually go through and experience what is involved in determining and setting priorities.

(iii) Attachments and country-specific emphases

(a) It is intended that, wherever possible, activities should be country-specific so as to ensure relevance to participants.

(b) The programme would also provide for attachment of persons from a Ministry in one country to a Ministry in another or even from one Ministry to another within the same country where deemed appropriate. This provision would facilitate close collaboration in the actual work context and could be basically of two kinds. In one case a resource person could be attached to a Ministry to work with the recipient Ministry's personnel in respect of their day to day jobs, bringing his/her expertise to bear on problems with which the local Ministry is grappling and providing or assisting with in-service training as needed.

(c) In the other case persons from one or more territories might be attached to a Ministry thus exposing them to experience of and some possible participation in an Education Ministry other than their own. Obvious benefits are the likely exposure to different policies, procedures and problems and, indeed, to different Ministry organization and functioning.

(d) It is further envisaged that attachments could be so structured as to provide a small "resource team" comprising personnel from two or three territories which would zero in on and assist a given Ministry in grappling with a particular exercise. Under the guidance of a specialist such a team could benefit significantly the territory to which its members were temporarily attached. Moreover, through this concentrated activity the team members would themselves derive benefit which would redound to the advantage of their own territories on their return.

E. Target Group

It is proposed that priority attention should be given to Chief Education Officers as well as to Education Officers whether directly or indirectly involved in planning.

The case for this approach lies in the fact, already noted, that many of the Ministries are too small to permit of a high degree of specialization as regards duties/responsibilities, and that officers more often than not find themselves at short notice having to turn their hands to a variety of matters. In any case it would seem desirable, especially in small Ministries, that all officers should have a clear understanding of basic requirements for effective and efficient planning, and of their own roles and possible contribution to this exercise.

A related consideration is that of seeking to increase understanding between these officers and the policy-makers. A critical matter will therefore be to ensure communication and interaction between the two groups. For purposes of explanation the term "policy makers" is seen as including Ministers of Education, Permanent Secretaries and economic planners and advisers.

F. Overall Emphases

Some of the main emphases in the overall programme would therefore be:

(i) General understanding of planning models, strategies and systems useful/applicable to the Caribbean.

(ii) Identification of planning needs, provisions and problems in the several territories through a survey in which the participants themselves would, desirably, be involved.

(iii) Training in specific skills and techniques in data collection, simple data analysis and reporting, and establishment of a sound data base for subsequent planning.

(iv) Training in techniques of Planning-Programming-Budgeting-Evaluation, and Project design and development.

(v) Orienting relevant persons to central issues in educational planning in their own territories.

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G. Resource personnel

It is envisaged that resource persons to lead various segments of the programme would be drawn from.

UWI
Ministries of Education
Local/regional/international consultants

and that appropriate scheduling and dove-tailing of activities would be done.

H. Anticipated outcomes

It is anticipated that at the end of the programme the following would have been achieved

1. In each territory there would be one or more persons with a general but sound understanding of educational planning and some skills and techniques in planning.

2. The CEO and one or more Education Officers in Ministries of Education would have a sound awareness of educational planning for national development.

3. Each participating territory would have improved its educational planning capability by modifying/improving its planning system if one already exists or by setting up provisions for educational planning as a part of the Ministry's activities in a more formal way than might previously have been done.

4. Each territory would have a general picture of the planning needs and problems and initial steps towards meeting these would have been taken.

5. A wider cross-section of persons in the respective education systems would have been oriented to planning, implementing and evaluating the education system for greater effectiveness.

6. The policy-makers and 'planners' would better understand each other resulting in better planning for education in the future.

I. Underlying principles

It should be evident from the preceding that the overall programme envisaged goes far beyond the limited concept of giving a few people in a few territories some additional skills, necessary though such skills are.

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The major and underlying objective of the programme is to help develop a self-sustaining capacity for educational planning within the region in general and within each territory in particular. The programme as envisaged therefore lays great store by heavy involvement of Ministries and Ministry personnel in every facet and at every stage, in the belief that such involvement of the Ministries and of their personnel is a sine qua non if the objectives stated are to be achieved.

Project Office