

UNITED STATES GOVERNMENT

# Memorandum

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*Goldstein*

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PD-ABA-506

TO : The Files

DATE: July 21, 1978

FROM : LAC/DR/HR, James D. Singletary

SUBJECT: Pre-Session - First Project Evaluation Team

The Pre-Session for the First Learning Resource Center Based Community Education System (LRCBCES) Evaluation was held Thursday, July 20, 1978.

In its effort to define the issues for the Evaluation Review, the Team agreed as follows:

1. The Grantee should be provided copies of the Issues Paper and the Project Evaluation Summary. (See Attachments: A - Issues Paper; Attachment B - Project Evaluation Summary - PES)
2. The Agenda for the First LRCBCES Project Evaluation should be revised to provide more time for a Review of Project Design and Issues. (See Attachment: C - Agenda - First LRCBCES Project Evaluation). The Evaluation Team request that (a) presentations should be of the critique or self-evaluation nature rather than information/show and tell, (b) advance copies of the presentations and background materials should be provided in a timely manner to team members and (c) as the members of the Evaluation Team will have read both the presentation statements and their relevant background materials, the Grantee should limit actual time of presentation to 10 or 15 minutes of the time provided for in the Agenda. The Evaluation Team prefer to spend most of the time on the issues, evaluation findings about external factors, requisite changes in design or execution as well as lessons learned.
3. The Grantee is requested to provide the Team with written materials (the Training Plan including the six training modules plus self evaluation presentation statements) as soon as possible and no later than evening of Wednesday, July 26, 1978 at the time of arrival.
4. The Project Evaluation Team will meet Friday, July 28, 1978 at 4:30 to complete the first draft of the Project Evaluation Summary (PES).
5. The Project Evaluation Team request an opportunity to discuss the first draft Project Evaluation Summary with the Project Manager prior to departure 7/29/78. (Time and plan to be determined).



DISTRIBUTION:

Dr. William C. Sayres  
Dr. Bernard Wilder  
Ms. Bernice Goldstein  
Dr. Howard D. Lusk  
Dr. James D. Singletary

Teachers College, Columbia University  
DS/EIR, Project Committee  
IAC/DP, Project Committee  
IAC/DR/IR, Project Committee  
IAC/DR/IR, Project Committee

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UNITED STATES GOVERNMENT

# Memorandum

**TO :** Learning Resource Center Based Community Education System (LRCBCES) Project Evaluation Team (See Distribution)

**DATE:** July 21, 1978

**FROM :** IAC/DR/HR, James D. Singletary

**SUBJECT:** Issues Paper - First Project Evaluation - Learning Resource Center Based Community Education System (LRCBCES) (IAC Regional - 598-0573)

The Evaluation Team will review Grant No. AID/1a-G-1169 on Thursday and Friday, July 27-28, 1978 in Room 303 Education Building, San Jose State University, San Jose, California.

The purpose of the grant is to (1) develop and analyze a conceptual model of a Learning Resource Center-Based Community Education System, elements of which would be suitable for adaptation in a variety of Latin American settings, and (2) train educational planners from six Latin American countries, which are either contemplating or currently engaged in community learning programs, in the techniques of analyzing and applying this conceptual model and its methodology in their own countries. The LRCBCES concept embraces the utilization of existing community resources in a mutually supportive way to help increase opportunities for and significance of learning experiences for members of the poor majority in the affected communities.

Project activities are being carried out in four phases: (1) development of a conceptual model which can be adapted to locale specific LRCBCES efforts; (2) intensive training of Latin American educators in techniques for analyzing, planning and implementing those aspects of the conceptual model which are deemed appropriate to the needs and resources of their specific countries; (3) as part of the training process, and as appropriate and desirable, provision of technical assistance to these educators (and their host-country colleagues) to help promote such implementation, and (4) development of a set of guidelines to assist educational planners to design/adjust and evaluate locale specific LRCBCES training, development of training materials, and preparation of evaluation guidelines and reports. A specific purpose grant of \$215,000 has been provided to San Jose State University to carry out the purpose of this project.

ISSUES: The project Evaluation Team will consider:

1. Products of Phase 1 - LRCBCES Conceptual Model:
  - a. Adequacy of LRCBCES Model to Latin American circumstances - The primary purpose of this project is to develop, evaluate and improve a conceptual model of Learning Resource Center Based Community Education System (LRCBCES) specifically adaptable to



Latin American circumstances. The Project Evaluation Team will discuss the extent to which this purpose has been achieved.

- b. The cost-effectiveness of implementing the LRCBCES model in Latin America - Critical to the success of this project is a cost-effective conceptual model. The Evaluation Team will discuss the adequacy of the model's provisions for assessing cost-effectiveness.
  - c. Coordination - The San Jose State University implementation concept for the project combined a team approach with considerable sub-contracting of specific reports, modules, etc. The Project Evaluation Team will review with San Jose State University the actual implementation concept in relation to the achievement of project outputs.
2. Plan for Phase II - Training/Advisory Workshop: The Training Plan will be evaluated from the points of view of (a) purpose, (b) content, (c) procedures, (d) materials, (e) faculty/resource staff, (f) criteria for selection of participants for the Training/Advisory Workshop, (g) criteria for the selection of the training site and (h) evaluation.
  3. Prospects for Phase III - The Evaluation Team will discuss the kinds of technical assistance to site teams operating in the field - by whom, to whom, when and how.
  4. Prospects for Phase IV - This discussion will focus on the content and outline of what should be in the final project report. In addition to summarizing and evaluating the processes and products related to the LRCBCES concept including guidelines for future planning for countries and educational entities undertaking community education efforts for their poor majority, attention will be given to plans for the dissemination of LRCBCES information.
  5. Grantee's estimation of feasibility of achieving grant objectives within specified time frame. (See: Attachment D - Progress to Date and Attachment: E - Calendar of Critical Activities/Evaluation Events)
  6. Project Budget Analysis - Grantee will discuss the Project Financial Plan including:
    - a. Statement of expenditures to date (10/1/76 - 6/15/78) (See: Attachment F - Expenditure Report)

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b. Estimated quarterly costs to the end of the project:

6/16/78 - 9/30/78  
10/1/78 - 12/31/78  
1/1/79 - 2/31/79

7. Fault Tree Analysis (FTA): The Project Evaluation Team will review the applicability of "Fault Tree Analysis" technique as a formative evaluation 'tool' in determining appropriateness of the LRCBCES concept in application.
8. Project Documents - The Evaluation Team will consider recommendations for revising the Project Paper (PP), Logical Framework, Financial Plan and Project Agreement.

DISTRIBUTION:

Dr. William C. Sayres	Teachers College, Columbia University
Dr. Bernard Wilder	DS/EHR, Project Committee
Ms. Bernice Goldstein	LAC/DP, Project Committee
Dr. Howard B. Lusk	LAC/DR/HR, Project Committee
Dr. James D. Singletary	LAC/DR/HR, Project Committee
Dr. Gene Lamb	Project Director, San Jose State University

ATTACHMENT: D

PROGRESS TO DATE:

Project activities between the signing of the Grant Agreement (AID/1a-G-1169) and this First Project Evaluation include the following:

September 30, 1976	- Grant Agreement	Signed
October 21-22, 1976	- Project Review - AID/W	Completed
February 20, 1977	- Project Team Retreat San Jose, Ca.	Completed
April 14, 1977	- Project Review - AID/W	Completed
	- Initial Fault Tree Analysis	Completed*
June 19-29, 1977	- Model Conference - Bogota, Colombia	Completed
August, 1977	- Needs Assessment	Completed first draft*
September 13, 1977	- Instructional Materials Inventory	Grantee reports The inventory completed*
September 21-22, 1977	- Project Review - San Jose, Ca.	Completed
September 30, 1977	- Site Visits	*
	- Economic Feasibility Study	Completed (to be revised)*
December 30, 1977	- Analysis of Regional Needs	*
March 31, 1978	- Conceptual Model	Second draft completed*

\* To be reviewed and evaluated at the First Project Evaluation (July 27-28, 1978, San Jose, Ca.)

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CALENDAR OF CRITICAL ACTIVITIES/EVALUATION EVENTS:

The Project Committee agreed to the following calendar which includes a "no cost" Grant extension.

July 27-28, 1978	First Project Evaluation - San Jose, Ca.
December 1978	Training/Advisory Workshop for Latin American educators, and Human Resources Development Officers will be invited to attend.
December 1978 or January 1979	Project Review (After Training/Advisory Workshop) (N.B.: The Second and Third Projects Evaluation are to be omitted)
December 1978 - February 1979	Assessment of Technical Assistance
December 1978 - February 1979	Implementation of Technical Assistance
January 31, 1979	Final Report Outline submitted
February 1979	Outcome Evaluation
March 1, 1979	Final Project Report
March 15, 1979	Final Project Evaluation
March 31, 1979	End of Project

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EXPENDITURE REPORT

(Specific Support Grant No. AID/1a-G-1169)  
(PIO/T No. 598-573-1-6517015)

<u>Category</u>	<u>1st ½ FY 77</u> <u>10/1/76-3/31/77</u>	<u>2nd ½ FY 77</u> <u>4/1/77-9/30/77</u>	<u>1st ½ FY 78</u> <u>10/1/77-3/31/78</u>	<u>Current Exp.</u> <u>4/1/78-5/15/78</u>	<u>Cumulative Exp.</u> <u>10/1/76-5/15/78</u>
Salaries, Wages & Benefits	\$ 12,812.14	\$ 14,775.81	\$ 12,635.27	\$ 3,220.34	\$ 40,444.56
Consultants	2,900.00	5,035.00	15,653.43	500.00	24,138.43
Travel	4,981.75	9,346.18	6,272.92	1,302.92	21,903.77
Materials & Supplies	1,640.03	2,438.66	(1,278.78)	744.56	3,544.52
Other Direct Costs	1,364.25	223.63	2,574.99	539.72	4,702.59
Sub-contract to Ofiesh Associates	16,666.65	19,999.98	- 0 -	1,270.00	37,936.63
Indirect Costs @ 48.5% of S+B	<u>6,213.89</u>	<u>7,156.75</u>	<u>6,123.11</u>	<u>1,561.86</u>	<u>21,070.61</u>
Total Costs	<u>\$ 46,578.76</u>	<u>\$ 59,037.01</u>	<u>\$ 41,985.94</u>	<u>\$ 9,139.40</u>	<u>\$156,741.11</u>

INSTRUCTIONS FOR COMPLETING FORM AID 1330-15 & 15A,  
PROJECT EVALUATION SUMMARY (PES)-PART I & II

**EVALUATION PROCESS** - Officials of the Host Government and AID Mission should collaborate in periodic evaluation of the progress of each project. (For AID/W projects, participation of grantees is appropriate.) Timing of such regular evaluations should be linked to the key decisional requirements of the project, as listed in the Evaluation Plan included in the Project Paper and as confirmed in the Evaluation Schedule of the Annual Budget Submission; otherwise annually. A description of the evaluation process is found in Handbook 3, Part II, Chapter 8.

**PURPOSES OF SUMMARY** - The Project Evaluation Summary (PES) is prepared after each review to record information which is useful both to the implementors (including the Host Government and contractors) and to concerned AID/W units. It serves four purposes:

- (1) Record of decisions reached by responsible officials, so that those who participated in the evaluation process are clear about the conclusions, and so that headquarters is aware of the next steps.
- (2) Notice that a scheduled evaluation has been completed, with a brief record of the method and participation for future reference.
- (3) Summary of progress and current status for use in answering queries.
- (4) Suggestions about lessons learned for use in planning and reviewing other projects of a similar nature. The PES and other project documentation are retained in DS/DIU/DI and are available to project planners.

**CONTENTS OF SUMMARY** - A PES submittal has two parts, plus relevant attachments if any.

**PART I REQUIRED:** Form AID 1330-15 contains identifying information about the project and evaluation (Items 1-7), action decisions about the project's future (Items 8-10), and signatures (Items 11-12). Since the PES reports decisions, it is signed by the Director of the Mission or AID/W Office responsible for the project. Space is also provided for signatures of the project officer, host country and other ranking participants in the evaluation, to the extent appropriate.

**PART II, OPTION 1:** For regular evaluations, use continuation sheets to respond to Items 13-23 as outlined in the attached Form AID 1330-15A.

**PART II, OPTION 2:** For a special evaluation, the reporting unit may opt for a somewhat varied format, with a different sequence or greater detail in some areas, however, Items 13-23 should all be addressed.

**ATTACHMENTS:** As appropriate, reports of host governments, contractors, and others, utilized in the preparation of the evaluation summary, should be labeled A, B, C, etc., attached to the PES submittal (Missions are to submit 7 copies and AID/W Offices 7 copies) and listed under Item 23. Where it is necessary to transmit these source documents separately from the PES, Block 23 of the PES should note how this material was transmitted, when, number of copies and to whom.

**SUBMITTAL PROCEDURE:** Missions will submit the PES Facesheet, continuation sheets, and attachments under cover of an airgram which will be received by the Cable Room. AID/W Offices will submit the PES Facesheet, continuation sheets, and attachments to MO/PAV, Room B-930, NS under cover of a memorandum which cites any distribution instructions beyond the standard distribution. All AID/W Offices and most Missions will use the blank cut PES Facesheet and plain bond for continuation sheets, which can be reproduced on copiers. Those Missions preferring to use hecto, may order the form in hecto sets from AID/W, Distribution Branch. There will be a standard distribution made in AID/W of all field-originated PES's. Copies will be sent to the corresponding bureau's DP, DR, the country desk and Evaluation Office. Other copies will be sent to PPC, SER, PDC and DS (including DI and ARC). For AID/W-generated PES's, copies will be distributed to all bureaus.

PROJECT EVALUATION SUMMARY (PES) - PART I

1. PROJECT TITLE		2. PROJECT NUMBER	3. MISSION/AID/W OFFICE
		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)	
		<input type="checkbox"/> REGULAR EVALUATION <input type="checkbox"/> SPECIAL EVALUATION	

5. KEY PROJECT IMPLEMENTATION DATES			6. ESTIMATED PROJECT FUNDING	7. PERIOD COVERED BY EVALUATION	
A. First PRO-AG or Equivalent FY _____	B. Final Obligation Expected FY _____	C. Final Input Delivery FY _____		A. Total \$ _____	B. U.S. \$ _____

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., aigram, SPAR, PIO, which will present detailed request.)	B. NAME OF OFFICER RESPONSIBLE FOR ACTION	C. DATE ACTION TO BE COMPLETED

9. INVENTORY OF DOCUMENTS TO BE REVISED PER ABOVE DECISIONS

<input type="checkbox"/> Project Paper	<input type="checkbox"/> Implementation Plan e.g., CPI Network	<input type="checkbox"/> Other (Specify) _____
<input type="checkbox"/> Financial Plan	<input type="checkbox"/> PIO/T	<input type="checkbox"/> Other (Specify) _____
<input type="checkbox"/> Logical Framework	<input type="checkbox"/> PIO/C	<input type="checkbox"/> Other (Specify) _____
<input type="checkbox"/> Project Agreement	<input type="checkbox"/> PIO/P	<input type="checkbox"/> 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)

12. Mission/AID/W Office Director Approval

Signature \_\_\_\_\_

Typed Name \_\_\_\_\_

Date \_\_\_\_\_

## PROJECT EVALUATION SUMMARY (PES) – PART II

The following topics are to be covered in a brief narrative statement (averaging about 200 words or half a page per item) and attached to the printed PES facesheet. Each topic should have an underlined heading. If a topic is not pertinent to a particular evaluation, list the topic and state: "Not pertinent at this time". The Summary (Item 13) should always be included, and should not exceed 200 words.

**13. SUMMARY** - Summarize the current project situation, mentioning progress in relation to design, prospects of achieving the purpose and goal, major problems encountered, etc.

**14. EVALUATION METHODOLOGY** - What was the reason for the evaluation, e.g., clarify project design, measure progress, verify program/project hypotheses, improve implementation, assess a pilot phase, prepare budget, etc? Where appropriate, refer to the Evaluation Plan in the Project Paper. Describe the methods used for this evaluation, including the study design, scope, cost, techniques of data collection, analysis and data sources. Identify agencies and key individuals (host, other donor, public, AID) participating and contributing.

**15. EXTERNAL FACTORS** - Identify and discuss major changes in project setting, including socio-economic conditions and host government priorities, which have an impact on the project. Examine continuing validity of assumptions.

**16. INPUTS** - Are there any problems with commodities, technical services, training or other inputs as to quality, quantity, timeliness, etc? Any changes needed in the type or amount of inputs to produce outputs?

**17. OUTPUTS** - Measure actual progress against projected output targets in current project design or implementation plan. Use tabular format if desired. Comment on significant management experiences. If outputs are not on target, discuss causes (e.g., problems with inputs, implementation assumptions). Are any changes needed in the outputs to achieve purpose?

**18. PURPOSE** - Quote approved project purpose. Cite progress toward each End of Project Status (EOPS) condition. When can achievement be expected? Is the set of EOPS conditions still considered a good description of what will exist when the purpose is achieved? Discuss the causes of any shortfalls in terms of the causal linkage between outputs and purpose or external factors.

**19. GOAL/SUBGOAL** - Quote approved goal, and subgoal, where relevant, to which the project contributes. Describe status by citing evidence available to date from specified indicators, and by mentioning the progress of other contributory projects. To what extent can progress toward goal/subgoal be attributed to purpose achievement, to other projects, to other causal factors? If progress is less than satisfactory, explore the reasons, e.g., purpose inadequate for hypothesized impact, new external factors affect purpose-subgoal/goal linkage.

**20. BENEFICIARIES** - Identify the direct and indirect beneficiaries of this project in terms of criteria in Sec. 102(d) of the FAA (e.g., a. increase small-farm, labor-intensive agricultural productivity; b. reduce infant mortality; c. control population growth; d. promote greater equality in income; e. reduce rates of unemployment and underemployment). Summarize data on the nature of benefits and the identity and number of those benefitting, even if some aspects were reported in preceding questions on output, purpose, or subgoal/goal. For AID/W projects, assess likelihood that results of projects will be used in LDC's.

**21. UNPLANNED EFFECTS** - Has the project had any unexpected results or impact, such as changes in social structure, environment, health, technical or economic situation? Are these effects advantageous or not? Do they require any change in project design or execution?

**22. LESSONS LEARNED** - What advice can you give a colleague about development strategy, e.g., how to tackle a similar development problem or to manage a similar project in another country? What can be suggested for follow-on in this country? Similarly, do you have any suggestions about evaluation methodology?

**23. SPECIAL COMMENTS OR REMARKS** - Include any significant policy or program management implications. Also list titles of attachments and number of pages.

AGENDA  
FIRST LRCEGES PROJECT EVALUATION  
San Jose State University  
Room 303 Education Building

Thursday, July 27, 1978

- 8:00 Review and Discussion of Concept Paper:  
From Visions to Development . . . . .Gene Lamb
- 10:30 Coffee Break
- 11:00 A Look at the Various Components of the Model  
Introduction . . . . . Gene Lamb  
  
Review and Discussion of Ofiesh Associates Materials,  
Relationship of Components to Model Gabe Ofiesh  
Resource Material Inventory (including Jim Brown's Paper Harold Hailer  
Media in the LRC-ECES Program) . . . . . Jim Brown
- 12:00 Lunch
- 1:30 Review of Multimedia Presentation . . . . . Iris Tiedt
- 2:45 Coffee Break
- 3:00 Review and Critique of the Training Modules  
Overview (video tape, 5 minutes) . . . . . Ron Hunt  
  
Working with Advisory Groups . . . . . Gary Johnson  
  
Evaluation/Economic/Needs Assessment . . . . . Gene Lamb
- 5:00 Adjournment
- 7:00 Buffet Dinner at Gene Lamb's  
Everyone is invited - transportation will be provided

Friday, July 28, 1978

- 8:00 Curriculum Development . . . . . Alice Mendeke  
  
Women's Development . . . . .Gene Lamb
- 10:30 Coffee Break
- 10:45 Discussion of the December Training Workshop . . . . . Lusk and Lamb
- 12:00 Lunch - Budget Review - Lamb, Lusk, Singletary, Amy Chiang,  
Madlyn Chase, Hunt, Lucy Reyes Ortiz
- 1:30 Review of Project Design and Issues . . . . .Howard Lusk
- 3:30 Coffee Break
- 3:45 Summary and Conclusion of Evaluation Session . . . . . Lusk and Lamb

UNITED STATES GOVERNMENT

# Memorandum

TO : Learning Resource Center Based Community  
Education System (LRCBCES) Project Evaluation  
Team (See Distribution)

FROM : LAC/DR/HR, James D. Singletary *JDS*

DATE: July 20, 1978

SUBJECT: First Project Evaluation - Learning Resource Center Based Community  
Education System (LRCBCES) (LAC Regional - 598-0573)

The First Project Evaluation will be held in Room 303 Education Building, San Jose State University, San Jose, California, Thursday and Friday, July 27-28, 1978. A copy of the Agenda is attached. (See Attachment A: AGENDA - LRCBCES Project First Evaluation and Attachment B: Materials for the First LRCBCES Project Evaluation)

ISSUES: The Project Evaluation Team will consider:

1. Product of Phase I - LRCBCES Conceptual Model:

- a. Definition and adaptability of LRCBCES Model to Latin American circumstances - The primary purpose of this project is to develop, evaluate and improve a conceptual model of LRCBCES (Learning Resource Center Based Community Education System) specifically adaptable to Latin American circumstances. The Project Evaluation Team will discuss the extent to which this purpose has been achieved.
- b. The cost-effectiveness of implementing the LRCBCES model in Latin America - Critical to the success of this project are (1) a cost-effective conceptual model and (2) a training plan that will increase the analytical and planning capacity of educational planners to adapt and introduce its relevant and cost-effective elements into ongoing or planned community-based activities. The Project Evaluation Team will discuss the cost-effectiveness of replicating the LRCBCES concept on a national basis.
- c. Coordination -
  1. At the time of the Concept Development Conference (June 1977), the Fault Tree Analysis (FTA) identified six project faults such as (1) the San Jose State University (SJSU) model will be overly theoretical and lack practical relevance, (2) the SJSU Group lack understanding of the different and non-formal projects currently developed in Latin America and (3) the model will lack conceptual



clarity. This discussion will focus on the coordination of FTA as a formative evaluation tool in determining appropriateness of the LRC in application.

2. The Special Technical Report on Instructional Technology and Its Application to LRCBCES Models defines instructional technology as a systematic way of designing, carrying out, and evaluating the total process of learning and teaching in terms of specific objectives, based on research in human learning and communication, and employing a combination of human non-human resources to bring about more effective instruction. As this is a separate report, the Team will discuss how the materials of the sub-contractors are built into the conceptual model.

4. Grantee's estimation of feasibility of achieving grant objectives within specified time frame. (See: Attachment: C. - Progress to Date and Attachment: D: - Calendar of Critical Activities/Evaluation Events)

5. Project Budget Analysis - Grantee will discuss the Project Financial Plan including:

- a. Statement of expenditures to date (10/1/76 - 6/15/78 - See: Attachment: E)
- b. Estimate quarterly cost to the end of the project:

6/16/78 - 9/30/78  
10/01/78 - 12/31/78  
1/01/78 - 3/31/79

7. Plan for Phase II - Training/Advisory Workshop: The Training Plan will be evaluated from the points of view of (a) purpose, (b) content, (c) procedures, (d) materials, (e) faculty/resource staff, (f) criteria for selection of participants for the Training/Advisory Workshop, (g) criteria for the selection of the training site and (h) evaluation.

8. Prospects for Phase III and IV - The Evaluation Team will review unresolved issues including:

- a. The description, validation and refinement of a variety of process strategies for implementing LRCBCES
- b. The applicability of "Fault Tree Analysis" technique as a formative evaluation 'tool' in determining appropriateness of the LRCBCES concept in application
- c. The analysis of the economic feasibility for adaptation of the LRCBCES in Latin American settings

- d. The content and outline of what should be in the final project report
- e. Plan for the dissemination of IRCBCES information
- f. Technical Assistance Assessment, Technical Assistance Plan (Phase III) and Implementation

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DISTRIBUTION:

Dr. William C. Sayres	Teachers College, Columbia University
Dr. Bernard Wilder	DS/EHR, Project Committee
✓ Ms. Bernice Goldstein	LAC/DP, Project Committee
Dr. Howard D. Lusk	LAC/DR/HR, Project Committee
Dr. James D. Singletary	LAC/DR/HR, Project Committee

*MB*

UNITED STATES GOVERNMENT

# Memorandum

TO : (See Distribution)

DATE: June 30, 1978

FROM : LAC/DR/HR, James D. Singletary *JDS*

SUBJECT: Pre-Session: First Project Evaluation - Learning Resource Center Based Community Education System (LRCBCES)

The Pre-Session for the First Learning Resource Center Based Community Education System (LRCBCES) Evaluation is scheduled for Thursday, July 20, 1978 in Room 2245 N.S. at 2:30 p.m. The purpose of this meeting is to define the issues of the First Project Evaluation.

Materials are attached as follows:

1. Project Review Materials:
  - a. - Purposes, Materials and Issues - 4/14/78
  - b. Revised Draft Handbook 3 Part II, Chapter 8, "Evaluation During Implementation.
  - c. - Project Review Report - 4/25/78
- ✓ 2. LRCBCES Concept Model - "From Visions to Development: A Learning Resource Center Based Community Education Systems Model"
- ✓ 3. Resource Inventory for Learning Resource Center-Based Community Education Systems (LRCBCES) for Latin America May 1978
4. A Special Technical Report on Instructional Technology and its Application to LRCBCES Models
- ✓ 5. Preliminary Program Agenda for the December Training/Advisory Workshop
6. Six Training Modules:
  - Women in Development Module
  - Evaluation Module
  - Economic Analysis
  - Needs Assessment Module
  - Community Advisory Group Development
  - Curriculum Development
- ✓ 7. Summary of Dr. Bhola's Interviews - 3/14-17/78
- ✓ 8. Multimedia Presentation Proposal - "Providing Equitable Educational Opportunities for the Rural Poor in Latin America"

DISTRIBUTION: Dr. William C. Sayres, Teachers College, Columbia University  
Dr. Bernard Wilder, DS/EHR, Project Committee  
✓ Ms. Bernice Goldstein, LAC/DP, Project Committee; Dr. Howard D. Lusk, LAC/DR/HR, Project Committee; Dr. James D. Singletary, LAC/DR/HR, Project Committee  
*Buy U.S. Savings Bonds Regularly on the Payroll Savings Plan*



UNITED STATES GOVERNMENT

# Memorandum

TO : The Files

DATE: April 25, 1978

FROM : LAC/DR/HR, James D. Singletary

SUBJECT: Project Review: Learning Resource Center-Based Community Education System (LRCBCES)

## BACKGROUND:

The Project Committee reviewed the Learning Resource Center-Based Community Education System (LRCBCES) Project (LA Regional - 598-0573) Wednesday, April 19 and Thursday, April 20, 1978 in Room 2245 N.S. The purposes of this Review were: (1) to assess the present development status of the LRCBCES Conceptual Model, and (2) to agree on the Calendar of Critical Activities/Evaluation Events and (3) to identify major items for consideration and inclusion in the Agenda for the First Project Evaluation. The Agenda, Materials and Issues for the review are Attachments 1, 2 and 3.

## PROGRESS TO DATE:

Project activities between the signing of the Grant Agreement (AID/1a-G-1169) and this review of the Conceptual Model (Phase I) include the following:

September 30, 1976	- Grant Agreement	Signed
October 21-22, 1976	- Project Review - AID/W	Completed
February 20, 1977	- Project Team Retreat San Jose, Ca.	Completed
April 14, 1977	- Project Review - AID/W	Completed
	- Initial Fault Tree Analysis	Completed*
June 19-29, 1977	- Model Conference - Bogota, Colombia	Completed
August, 1977	- Needs Assessment	Completed first draft*
September 13, 1977	- Instructional Materials Inventory	Grantee reports The inventory completed*
September 21-22, 1977	- Project Review - San Jose, Ca.	Completed
September 30, 1977	- Site Visits	*
	- Economic Feasibility Study	Completed (to be revised)*



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December 30, 1977  
March 31, 1978

- Analysis of Regional Needs  
- Conceptual Model

\*  
Second draft  
completed\*

CONCLUSIONS/RECOMMENDATIONS:

In brief, the Project Committee concluded during meetings that the Grantee had prepared an adequate draft LRCBCES Conceptual Model. It is expected that by the time of the first Evaluation Meeting, July 27-28, 1978 the Grantee will have revised the present conceptual model and will give special attention to making it adaptable to Latin American circumstances, and will prepare a plan to train educational planners to introduce it into ongoing or planned community based learning center activities.

I. Conceptual Model - The Project Committee concluded that the theoretical model must be more sharply focused in terms of the individual, family and community living in Latin America and the Grantee was requested to clarify the description and analysis sections of the model with a view to those realities. The Review Committee also made a specific suggestion that the clarity of writing be improved (we found the document obtuse, full of jargon and difficult to read). The consensus was that the revised LRCBCES model should have increased articulation of its components, flexibility that includes viable alternatives as well as a systematic coordination and supervision of the interacting components.

II. Training Plan - A cost-effective conceptual model and a training plan are critical to success of this project. This training plan should include experiences designed to increase the analytical and planning capacity of educational planners to adapt and introduce its relevant and cost-effective elements into on-going or planned community-based activities. The plan for the Training/Advisory Workshop will be prepared by the San Jose State University and will be discussed at the First Project Evaluation (July 27-28, 1978). The Project Committee made the following suggestions to improve the present Training Modules:

A. Women in Development Module - LAC/DR/HR Ms. Charlotte Jones and LAC/DP Ms. Roma Knee will be asked to critique this module. This review should be completed before June 1. It was also suggested that the Grantee might want to have Ms. Catherine Crone of World Education, Inc. review this module.

B. Evaluation Module - The Grantee agreed to strengthen this module.

C. Economic Analysis - LAC/DR/HR Ms. Charlotte Jones will be asked to critique this module and send her reactions directly to Dr. Philip Blair and Dr. Gene Lamb.

D. Needs Assessment Module - The Review Committee considered this

\* To be reviewed and evaluated at the First Project Evaluation (July 27-28, 1978, San Jose, Ca.)

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(3)

module a "pasted-together" collection of disparate parts. Dr. Juan Braun (AID-SNPP contractor in Paraguay) has been sent a copy of this module and will continue to cooperate with the Grantee in its improvement. Also, the Grantee will contact other persons.

E. Community Advisory Group Development Module - It was agreed that Dr. Gary L. Johnson should field test this module in Peru in June. It has been suggested that Dr. Johnson might test both the Evaluation and the Community Advisory Group Development modules in Peru if revisions are completed in time.

F. Curriculum Development Module - This module, as reviewed, was brief, an outline. Dr. Gene Lamb accepts responsibility for completing this module and may field test it in Paraguay prior to the First Project Evaluation.

III. Calendar of Critical Activities/Evaluation Events - The Project Committee agreed to the following calendar. This includes a "no cost" Grant extension which will be requested for approval.

July 27-28, 1978	First Project Evaluation - San Jose, Ca.
December 1978	Training/Advisory Workshop for Latin American educators. IAC Education and Human Resources Development Officers will be invited to attend.
December 1978 or January 1979	Project Review (After Training/Advisory Workshop) (N.B.: The Second and Third Projects Evaluation are to be omitted)
December 1978 - February 1979	Assessment of Technical Assistance
December 1978 - February 1979	Implementation of Technical Assistance
January 31, 1979	Final Report Outline submitted
February 1979	Outcome Evaluation
March 1, 1979	Final Project Report
March 15, 1979	Final Project Evaluation
March 31, 1979	End of Project

IV. Agenda: First Project Evaluation - The First Project Evaluation will be held at San Jose, California, Thursday and Friday, July 27-28, 1978. The Project Committee drafted the following Agenda:

A. Product of Phase I - LRCBCES Conceptual Model: The Evaluation Team will discuss the LRCBCES Model in terms of (1) its adaptability to Latin

(4)

American circumstances, (2) the cost effectiveness of implementing the LRCBCES model in Latin America and (3) changes suggested during this revision.

B. Plan for Phase II - Training/Advisory Workshop: The Training Plan will be evaluated from the points of view of (1) purpose, (2) content, (3) procedures, (4) materials, (5) faculty/resource staff, (6) criteria for selection of participants for the Training/Advisory Workshop, (7) criteria for the selection of the training site and (8) evaluation.

C. Prospects for Phases III and IV - The Evaluation Team will review unresolved issues including:

1. The description, validation and refinement of a variety of process strategies for implementing LRCBCES
2. The applicability of "Fault Tree Analysis" technique as a formative evaluation 'tool' in determining appropriateness of the LRCBCES concept in application
3. The analysis of the economic feasibility for adaptation of the LRCBCES in Latin American settings
4. The content and outline of what should be in the final project report
5. Plan for the dissemination of LRCBCES information
6. Technical Assistance Assessment, Technical Assistance Plan (Phase III) and Implementation
7. Project Budget Analysis.

Attachments: a/s

Distribution: Project Review Committee - Learning Resource Center Based Community Education System (LRCBCES)

Dr. Bernard Wilder, DS/ED  
Ms. Bernice Goldstein, LAC/DP,  
Evaluation Officer  
Dr. Howard D. Lusk, LAC/DR/HR  
Dr. James D. Singletary, LAC/DR/HR,  
Project Manager

and to Dr. Gene Lamb, Project Director, San  
Jose State University

LAC/DR/HR:JDSingletary (4/24/78)

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UNITED STATES GOVERNMENT

# Memorandum

TO : (See Distribution)

DATE: April 14, 1978

FROM : LAC/DR/HR, James D. Singletary *JDS*

SUBJECT: Project Review: Learning Resource Center Based Community Education System (LRCBCES)

The fourth LRCBCES Project Review is scheduled for Wednesday, April 19, and Thursday, April 20, 1978 in Room 2245 N.S. The purposes of this Review are: (1) to discuss the LRCBCES Conceptual Model, and (2) to agree upon the Calendar of Critical Activities/Evaluation Events and the Agenda for the First Project Evaluation. The agenda for this meeting is attached.

The materials for the review are (1) the Quarterly Report No. 6 (January 1 - March 30, 1978), (2) Media in the LRCBCES Program - A Special Technical Report on Instructional Technology and its Application to LRCBCES Models, and (3) six Training Modules (Women in Development, Evaluation, Economic Analysis, Needs Assessment, Community Advisory Group Development, and Curriculum Development -- Drafts).

The LRCBCES model assumes that (1) a network of LRC's of some form or another could serve as the backbone of community education and that (2) an effective system of education and extended services to the community could be built on the basis of learning materials available in the LRC's. In this model, the learning resource center is viewed as the integrator of the "Realities at the Community Level" with "The National Vision".

This multi-faceted model defines a learning resource center as (1) a catalyst, a stimulus, a mechanism for exacting from the community its educative potential, (2) a way to enlarge education capacity and to invent new approaches to learning, (3) a way to release the energies of the community and direct them constructively, and (4) a tool for ensuring the existing form of formal and nonformal education contribute constructively and non-competively to community education objectives. The discussion of the LRCBCES model focuses on (1) the Individual Growth to Community Development Continuum, (2) the Decentralized to Centralized Program and Organization Continuum, and (3) the Abstract to Concrete Materials and Methods Continuum plus a "Functional Flow Chart of the LRC-BCES Organization Network". Separate sections discuss Staffing Skills, Economic Analysis, Facilities and some suggestions for field testing the model beyond the Project's Training Seminar and Field-Based Technical Assistance.



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The Project Committee will consider the following issues:

1. Definition of the LRCBCES Model - The primary purpose of this project is to develop, evaluate and improve a conceptual model of a Learning Resource Center Based Community Education System (LRCBCES) specifically adaptable to Latin American circumstances. The Project Committee will discuss the extent to which this purpose has been achieved.
2. Replicability - Critical to the success of this project are (a) a cost-effective conceptual model and (b) a training plan that will increase the analytical and planning capacity of educational planners to adapt and introduce its relevant and cost-effective elements into ongoing or planned community-based activities. The Project Committee will discuss the cost-effectiveness of replicating the LRCBCES concept on a national basis.
3. Coordination -
  - a. At the time of the Concept Development Conference (June 1977), the Fault Tree Analysis (FTA) identified six project faults such as (1) the San Jose State University (SJSU) model will be overly theoretical and lack practical relevance, (2) the SJSU Group lack understanding of the different and non-formal projects currently developed in Latin America and (3) the model will lack conceptual clarity. This discussion will focus on the coordination of FTA as a formative evaluation tool in determining appropriateness of the LRC in application. *Remembering 3 "faults" p22*
  - b. The Special Technical Report on Instructional Technology and Its Application to LRCBCES Models defines instructional technology as a systematic way of designing, carrying out, and evaluating the total process of learning and teaching in terms of specific objectives, based on research in human learning and communication, and employing a combination of human non-human resources to bring about more effective instruction. As this is a separate report, the Project Committee will discuss how the materials of the sub-contractors are built into the conceptual model.
  - c. One of the six Training Modules, "Women in Development," concludes with the observation that success is contingent upon an authentic transformation of the economic and social structure. The Project Review will discuss how the LRCBCES Model and the training modules will support policies designed to provide information about the social and economic values of education and the feasibility of Learning Resource Centers as coordinators. ?

Distribution: Project Committee - Learning Resource Center Based  
Community Education System (LRCBCES)

San Jose State University

Dr. Gene Lamb

DS/EHR

Dr. Bernard Wilder

✓ LAC/DP

Ms. Bernice Goldstein

LAC/DR/HR

Dr. Howard D. Lusk

Dr. James D. Singletary

27'

LEARNING RESOURCE CENTER-BASED COMMUNITY EDUCATION

SYSTEM PROJECT REVIEW

AGENDA

Wednesday, April 19, 1978

9:30 A.M. - Rm. 2245 N.S.

I. Conceptual Model - Learning Resource Center-Based  
Community Education System (LRCBCEs)

Gene Lamb

- A. Educational Theory
- B. Methodology
- C. Organization

- 1. Clients
- 2. Organizational Structure and Programs
- 3. Materials and Methods of Instruction

- D. Staff Skills
- E. Facilities
- F. Economic Analysis and Budgeting

II. LRCBCEs Cost Effectiveness

Gene Lamb

III. Project Coordination

Gene Lamb

- A. Far West Center for Community School Development
- B. Instructional Technology Department
- C. Fault Tree Analysis
- D. Sub-contractors

IV. Summary/Recommendations

Gene Lamb

V. Issues

James D. Singletary

Thursday, April 20, 1978

9:30 A.M. - Rm. 2245 N.S.

I. Calendar of Critical Activities/Evaluation  
Events

Lamb/Singletary

- A. Training/Advisory Workshop
- B. First Project Evaluation - (6/7-8/78)
- C. Assessment of Technical Assistance *Feb. '79*
- D. Final Report Outline
- E. Second Project Evaluation
- F. Implementation of Technical Assistance Plan *also due 7 Feb*
- G. ~~Outcome~~ Evaluation (P53) *Final Eval*
- H. Fault Tree Process *see statement in June '78 quarterly Report*
- I. Final Report *March '79 (End of project)*
- J. Final Project Evaluation *March 15 (with 15)*

II. Agenda: First Project Evaluation

Lamb/Singletary

*Two copies each.  
Ass.  
1) beta workshop  
→ Feb  
2) some more*

*Project ends  
30 Mar '79  
ie 6 mos to transition*

*24*

LATIN AMERICAN REGIONAL PROJECT (598-0573)  
 LEARNING RESOURCE CENTER BASED COMMUNITY EDUCATION  
 SYSTEMS (LRCECES)

CALENDAR OF CRITICAL ACTIVITIES/EVALUATION EVENTS\*

September 30, 1976	- Grant Agreement	Signed
October 21 - 22, 1976	✓ - Project Review - AID/W	Completed
February 20, 1977	- Project Team Retreat	Completed
April 14, 1977	✓ - Project Review - AID/W	Completed
	- <u>Initial</u> Fault Tree Analysis - Summary/Recommendations <i>will be reported</i>	
June 19 - 29, 1977	- Model Conference	Completed
August, 1977	- Needs Assessment - <i>completed</i> Summary/Recommendations	
September 13, 1977	- Instructional Materials Inventory- Summary/Recommendations	
September 21 - 22, 1977	✓ - Project Review - San Jose State U.	Completed
September 30, 1977	- Site Visits - Summary/Recommendations	
	- Economic Feasibility Study - Summary/Recommendations	
December 30, 1977	- Analysis of Regional Needs - Summary/Recommendations	
March 31, 1978	- Conceptual Model - Description/Analysis - Phase I	
April 19 - 20, 1978	✓ - Project Review - AID/W	
July 30, 1978	→ - Training/Advisory Workshop Summary/Recommendations - Phase II	
	- First Project Evaluation	
	- Assessment of Technical Assistance Summary/Recommendations - Phase III	
	- Second Project Evaluation	
	- Final Report Outline - Including all working papers related to the project's plans, imple- mentation, evaluation and recommendations - Phase IV	
	- <del>Third</del> Project Evaluation <i>Review (consequences w. such step)</i>	
	- Implementation of Technical Assistance Plan	
September, 1978	- Outcome Evaluation - Summary/Recommendations	
September 30, 1978	- Fault Tree Process - Summary/Recommendations	
	- Final Report	
	- Final Project Evaluation	

*within 6 weeks  
following workshop  
(M?)*

*27 July (multi media  
presentation)*

*25*

\* Project Paper 9/28/76 and Revision (Lamb letter to Singletary 6/15/77)

LA/DR/EHR:JDSingletary (3/10/78)

**PROJECT DESIGN SUMMARY  
LOGICAL FRAMEWORK**

Life of Project:  
From FY \_\_\_\_\_ to FY \_\_\_\_\_  
Total U.S. Funding \_\_\_\_\_  
Date Prepared: \_\_\_\_\_

Project Title & Number: Learning Resource Center Based Community Education

NARRATIVE SUMMARY	OBJECTIVELY VERIFIABLE INDICATORS	MEANS OF VERIFICATION	IMPORTANT ASSUMPTIONS																		
<p><b>Program or Sector Goal:</b> The broader objective to which this project contributes:</p> <p>To create a community-level entity to help rural Latin American poor improve their personal lives, through self-motivated education.</p>	<p><b>Measures of Goal Achievement:</b></p> <p>Significant numbers of adults and children utilizing LRCBCES voluntarily for obtaining learning experiences.</p>	<ol style="list-style-type: none"> <li>1. Observation by project staff, Mission personnel.</li> <li>2. LRC records.</li> </ol>	<p><b>Assumptions for achieving goal targets:</b></p> <p>That LRC's in developing countries are far enough into implementation that indicators can be observed during study development and evaluation period (12 months).</p>																		
<p><b>Project Purpose:</b></p> <p>To develop a practical LRCBCES conceptual model suitable for adaptation to a variety of L.A. settings, and to train Latin American educators and planners in the adaptation of facets of this model.</p>	<p><b>Conditions that will indicate purpose has been achieved: End of project status.</b> 1. Staffs of MOE's in 6 countries trained in and demonstrating a capacity to plan, implement and evaluate LRCs. 2. Generalized conceptual model of the LRC disseminated to &amp; being considered by the participating countries. 3. Staffs of the LRCs or the MOE trained in analysis of and utilizing portions of inventory of instructional materials for LRCBCES.</p>	<ol style="list-style-type: none"> <li>1. Review of model.</li> <li>2. Training materials in hand.</li> <li>3. Implementation plan; technical assistance request in writing, assessment of project staff.</li> <li>4. Written confirmation from site team: project records.</li> <li>5. Report in hand; information used in preparation of assessment guidelines manual.</li> <li>6. Site team reports; mission personnel (verification).</li> </ol>	<p><b>Assumptions for achieving purpose:</b></p> <p>That adequate resources (materials including funds and human) will be made available.</p>																		
<p><b>Outputs:</b> 1. Conceptual model of the generalizable LRC. 2. An assessment of the economic feasibility of the LRC model. 3. Inventory of validated instructional materials and methodologies from the LA region. 4. Planning, implementation and evaluation guidelines for adaptation of the basic LRC model to specific situations. 5. Two people from each of six participating LRCs trained in adaptation, implementation and evaluation of the LRC model.</p>	<p><b>Magnitude of Outputs:</b></p> <p>1. One generalizable model presented in written &amp; multi-media form. 2. Assessment of the economic feasibility of the model to contain: a) the feasibility of the general model, &amp; b) methodology to determine feasibility of specific adaptations. 3. Inventory of learning materials to contain availability data in categories relevant to six participating countries. 4. 12 (to 24) people from participating countries trained for a minimum of two weeks.</p>	<ol style="list-style-type: none"> <li>1. Reports in hand and used as part of model building conference.</li> <li>2. Examination of report of USAID staff, project management. Critique of multi-media presentation.</li> <li>3. List reviewed by USAID personnel evaluator.</li> <li>4. Conference records and evaluation.</li> <li>5. Conference record confirmation by evaluator.</li> <li>6. Local USAID confirmation records.</li> <li>7. Report in hand; evaluation.</li> <li>8. Materials in hand.</li> <li>9. Project records; USAID and project staff use.</li> </ol>	<p><b>Assumptions for achieving outputs:</b></p> <ol style="list-style-type: none"> <li>1. That project staff is capable and available.</li> <li>2. That funding is provided in timely fashion by AID, USAIDs and host countries.</li> <li>3. That host countries are prepared and willing to cooperate</li> </ol>																		
<p><b>Inputs:</b> See attached budget and implementation schedules. San Jose State University</p> <ol style="list-style-type: none"> <li>1. Project Management</li> <li>2. Consultants</li> <li>3. Technical Assistance</li> </ol> <p>AID</p> <ol style="list-style-type: none"> <li>1. Mission Consultation</li> <li>2. Regional Consultation</li> <li>3. Project Monitoring</li> </ol> <p>Local Governments</p> <ol style="list-style-type: none"> <li>1. Site Teams</li> <li>2. Operating Funds: LRC's</li> </ol>			<p><b>Assumptions for providing inputs: IMPLEMENTATION GOALS</b></p> <table border="0"> <tr> <td>A.I.D. (U.S. \$1,000)</td> <td></td> </tr> <tr> <td>Technical Assistance</td> <td>64</td> </tr> <tr> <td>Participant Training</td> <td>34</td> </tr> <tr> <td>Evaluation</td> <td>18</td> </tr> <tr> <td>Economic Analysis</td> <td>10</td> </tr> <tr> <td>Guidelines &amp; Multi-Media presentation</td> <td>45</td> </tr> <tr> <td>Supplies, communication and travel</td> <td>12</td> </tr> <tr> <td>Indirect costs</td> <td>42</td> </tr> <tr> <td><b>TOTAL</b></td> <td><b>215</b></td> </tr> </table>	A.I.D. (U.S. \$1,000)		Technical Assistance	64	Participant Training	34	Evaluation	18	Economic Analysis	10	Guidelines & Multi-Media presentation	45	Supplies, communication and travel	12	Indirect costs	42	<b>TOTAL</b>	<b>215</b>
A.I.D. (U.S. \$1,000)																					
Technical Assistance	64																				
Participant Training	34																				
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Economic Analysis	10																				
Guidelines & Multi-Media presentation	45																				
Supplies, communication and travel	12																				
Indirect costs	42																				
<b>TOTAL</b>	<b>215</b>																				

ANNEX A

PROGRAM DESCRIPTION

A. Purpose and Objectives of Grant

*Phase I →*  
The purpose of this Grant is to provide support for a program to develop, evaluate and improve a conceptual model of a Learning Resource Center-Based Community Education System (LRCBCEs) specifically adaptable to Latin American circumstances and to train educators from not less than six Latin American countries in the fundamentals of adapting, planning, implementing and evaluating such a system.

B. Implementation

To achieve the above objectives, the Grantee shall carry out the following activities with funds provided by this Grant:

I. The Grantee will coordinate the efforts of its Far West Center for Community School Development and its Instructional Technology Department to develop a conceptual model of a Learning Resources Center-Based Community Education System (LRCBCEs) and train Latin American educators from appropriate countries in the adaptation of facets of this model designed to provide significant learning experiences for members of their poor majority.

II. Using already existing capabilities, the Grantee will define and describe an ideal LRCBCEs model suitable for adaptation to a variety of Latin American settings. Activities leading to this include the following:

1. Development of techniques for assessing community learning needs;
  2. Development of techniques for determining the readiness of a specific community to undertake an LRCBCEs, or to extend present efforts;
  3. Describing, validating, and refining a variety of process strategies for implementing LRCBCEs's;
  4. Investigation of the economic feasibility of the LRC concept, including benefits and impact, probable costs and methods of financing LRCBCEs's;
  5. Analysis and development of realistic organizational and instructional technology needed to implement an LRCBCEs in a particular site;
  6. Testing the applicability of "Fault Tree Analysis" technique.
- VB*

as a formative evaluation tool in determining appropriateness of the LRC concepts in application;

7. Studying and preparing recommendations about other problems involved in implementing LRCBCES's in Latin American communities especially where the concept is unknown.
8. Orient educational teams of education planners (from selected local sites) to the potentials of LRCBCES's and train these teams to collect, analyze and interpret needed information as well as to conceptually manage, implement and apply facets of the model to the country-specific circumstances. Activities included under that rubric include:
  - a. Developing and analyzing plans for implementing adaptation of LRCBCES's, prepared by participants as a part of their training program;
  - b. As appropriate, providing field assistance to one or two country teams who are implementing projects in community education and are desirous of adapting the LRCBCES model to ongoing activities.

III. The project will be executed in four phases; some of which, such as Phase One and Two will be occurring simultaneously.

Phase One:

Grantee and LDC practitioners will build a conceptual framework, to develop, adapt and evaluate LRCBCES's

Phase Two:

Grantee will provide the training (through workshops) for site teams from six Latin American nations .

Phase Three:

Grantee will provide technical assistance to site teams operating in the field as desired and appropriate.

Phase Four:

Grantee will prepare and disseminate a report summarizing and evaluating the processes and products related to the LRCBCES concept, to provide additional guidelines for future planning for countries and educational entities undertaking community education efforts for their poor majority.

C. Reporting

The Grantee will provide quarterly progress reports to AID/W. In addition, during the life of the project, grantee will provide at least two methodological working documents, including a description and analysis of the conceptual model of a generalized LROBES, and an analysis of its economic feasibility for adaptation in Latin American settings. Copies of these will be furnished to all participating Missions and host countries. The Grantee will prepare a final report, as described in the foregoing B. III, Phase Four, including all working papers related to the project's plans, implementation evaluation and recommendations. Ten copies will be submitted to AID/W (LA/DR/EST). Documents supplied to the Missions will be in English and in Spanish.

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D. Budget

1. The funds provided herein and any additional amounts which may hereafter be obligated under the subject Grant shall be used to finance the following total budget for the program described in the foregoing paragraphs A and B:

Salaries	\$ 57,004
Consultants	38,050
Travel	46,205
Materials	25,600
Other Direct Costs	13,827
Overhead	
San Jose State University	
Foundation	27,647
* OFIESH Associates	
Subcontract	<u>6,667</u>
<b>TOTAL</b>	<b>\$215,000</b>

\* This subcontract will require the prior written approval of the Standard Provisions (Attachment B).

2. The foregoing budget is illustrative only and the funds provided may be used for any of the budget categories. The funds provided shall be available to the Grantee from October 1, 1976 through September 30, 1977.

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LRC BCES PROJECT  
First Evaluation  
San Jose State University  
Room 301 Education Bldg.

Thursday, July 27, 1978

- 8:00 Review and Discussion of Concept Paper:  
From Visions to Development . . . . . Gene Lamb
- 10:30 Coffee Break
- 11:00 A look at the Various Components of the Model  
Introduction. . . . . Gene Lamb
- 12:00 Lunch
- 1:30 Review and Discussion of Ofiesh Associates Materials,  
Relationship of Components to Model  
Resource Material Inventory (including Jim Brown's Paper  
Media in the LRC-BCES Program) . . . . . Gabe Ofiesh  
Harol Hailer  
Jim Brown
- 2:45 Coffee Break
- 3:00 Review of Multimedia Presentation . . . . . Iris Tiedt
- 5:00 Adjournment
- 7:00 Buffet Dinner at Gene Lamb's  
Everyone is invited - transportation will be provided

Friday, July 28, 1978

- 8:00 Review and Critique of the Training Modules  
Overview (video tape, 5 minutes) . . . . . Ron Hunt  
Working with Advisory Groups . . . . . Gary Johnson  
Evaluation/Economic/Needs Assessment . . . . . Gene Lamb
- 10:30 Coffee Break
- 10:45 Curriculum Development . . . . . Alice Mendeke  
Women's Development. . . . . Gene Lamb
- 12:00 Lunch - Budget Review - Lamb, Singletary, Amy Chiang, Madlyn Chase,  
Hunt, Lucy Reyes Ortiz
- 1:30 Discussion of the December Training Workshop . . . . . Lusk and Lamb
- 3:30 Coffee Break
- 3:45 Open Discussion on any Problems that Need to be  
addressed . . . . . Jim Singletary
- 4:30 Summary and Conclusion of Evaluation Session . . . . . Howard Lusk

MATERIALS FOR THE FIRST LRCBCES PROJECT EVALUATION

1. Project Review Materials:
  - a. - Purposes, Materials and Issues - 4/14/78
  - b. Revised Draft Handbook 3 Part II, Chapter 8, "Evaluation During Implementation.
  - c. - Project Review Report - 4/25/78
  - d. Project Evaluation Summary
2. LRCBCES Concept Model - "From Visions to Development: A Learning Resource Center Based Community Education Systems Model"
3. Resource Inventory for Learning Resource Center-Based Community Education Systems (LRCBCES) for Latin America May 1978
4. A Special Technical Report on Instructional Technology and its Application to LRCBCES Models
5. Preliminary Program Agenda for the December Training/Advisory Workshop
6. Six Training Modules: Women in Development Module  
Evaluation Module  
Economic Analysis  
Needs Assessment Module  
Community Advisory Group Development  
Curriculum Development
7. Summary of Dr. Bhola's Interviews - 3/14-17/78
8. Multimedia Presentation Proposal - "Providing Equitable Educational Opportunities for the Rural Poor in Latin America"

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ATTACHMENT: C

PROGRESS TO DATE:

Project activities between the signing of the Grant Agreement (AID/1a-G-1169) and this First Project Evaluation include the following:

September 30, 1976	- Grant Agreement	Signed
October 21-22, 1976	- Project Review - AID/W	Completed
February 20, 1977	- Project Team Retreat San Jose, Ca.	Completed
April 14, 1977	- Project Review - AID/W	Completed
	- Initial Fault Tree Analysis	Completed*
June 19-29, 1977	- Model Conference - Bogota, Colombia	Completed
August, 1977	- Needs Assessment	Completed first draft*
September 13, 1977	- Instructional Materials Inventory	Grantee reports The inventory completed*
September 21-22, 1977	- Project Review - San Jose, Ca.	Completed
September 30, 1977	- Site Visits	*
	- Economic Feasibility Study	Completed (to be revised) *
December 30, 1977	- Analysis of Regional Needs	*
March 31, 1978	- Conceptual Model	Second draft completed*

\* To be reviewed and evaluated at the First Project Evaluation (July 27-28, 1978, San Jose, Ca.)

ATTACHMENT: D

CALENDAR OF CRITICAL ACTIVITIES/EVALUATION EVENTS:

The Project Committee agreed to the following calendar which includes a "no cost" Grant extension.

July 27-28, 1978	First Project Evaluation - San Jose, Ca.
December 1978	Training/Advisory Workshop for Latin American educators. IAC Education and Human Resources Development Officers will be invited to attend.
December 1978 or January 1979	Project Review (After Training/Advisory Workshop) (N.B.: The Second and Third Projects Evaluation are to be omitted)
December 1978 - February 1979	Assessment of Technical Assistance
December 1978 - February 1979	Implementation of Technical Assistance
January 31, 1979	Final Report Outline submitted
February 1979	Outcome Evaluation
March 1, 1979	Final Project Report
March 15, 1979	Final Project Evaluation
March 31, 1979	End of Project

EXPENDITURE REPORT

(Specific Support Grant No. AID/1a-G-1169)  
 (PIO/T No. 598-573-1-6517015)

<u>Category</u>	<u>1st ½ FY 77</u> <u>10/1/76-3/31/77</u>	<u>2nd ½ FY 77</u> <u>4/1/77-9/30/77</u>	<u>1st ½ FY 78</u> <u>10/1/77-3/31/78</u>	<u>Current Exp.</u> <u>4/1/78-6/15/78</u>	<u>Cumulative Exp.</u> <u>10/1/76-6/15/78</u>
Salaries, Wages & Benefits	\$ 12,812.14	\$ 14,776.81	\$ 12,635.27	\$ 3,220.34	\$ 43,444.56
Consultants	2,900.00	5,085.00	15,653.43	500.00	24,138.43
Travel	4,961.75	9,346.18	6,272.92	1,302.92	21,903.77
Materials & Supplies	1,640.08	2,438.66	(1,278.78)	744.56	3,544.52
Other Direct Costs	1,364.25	223.63	2,574.99	539.72	4,702.59
Sub-contract to Ofiesh Associates	16,666.65	19,999.98	- 0 -	1,270.00	37,936.63
Indirect Costs @ 48.5% of SWB	<u>6,213.89</u>	<u>7,166.75</u>	<u>6,128.11</u>	<u>1,561.86</u>	<u>21,070.61</u>
Total Costs	<u>\$ 46,578.76</u>	<u>\$ 59,037.01</u>	<u>\$ 41,985.94</u>	<u>\$ 9,139.40</u>	<u>\$156,741.11</u>