



## UMass/UPIC Advanced Degree Activity



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**United States Agency for International Development  
UMass/UPIC Advanced Degree Activity**

**Project 690-A-00-01-00143-00**

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## **1. Summary**

The Advanced Degree Activity (ADA) consists of a partnership between the University of Massachusetts Amherst (UMass), Chancellor College (CC), the Ministry of Education, Science & Technology (MOEST), and the Malawi National Examinations Board (MANEB). The purpose of this partnership is to build human resource and institutional capacity to promote the planning and leadership functions of the education sector by developing Chancellor College's capacity to offer post-graduate degree programs in Policy, Planning & Leadership and Testing & Measurement. Working in partnership with Malawi educators, the program will offer advanced degree training for 26 educators to serve two interrelated goals: 1) in the short term, to upgrade and develop the skills of current educators, planners, and testing and measurement professionals currently working in the Planning Division of the Ministry and in its regional offices, in MANEB, and in Chancellor College; and 2) in the longer term, to build the sustainable capacity at Chancellor College to offer its own advanced degrees in those two areas. These new degree programs will then train policy analysts, planners, and experts in testing and measurement to contribute to the development of education in Malawi. Developing institutional capacity at Chancellor College and human resources in MOEST and MANEB will ensure sustained enhancement of the quality of education in Malawi.

The first quarter of this project was primarily focused on the start-up activities that will serve as the foundation upon which the remainder of this project's ability to achieve these goals depends.

In this report, the activities of this quarter are divided into the following categories:

1. Activities and progress that took place in Malawi;
2. Activities and progress that took place at the University of Massachusetts Amherst;
3. Challenges;
4. Deliverables and other documents; and
5. Expenditure Report

## **2. Activities and Progress in Malawi**

In June, 2001 three faculty members from UMass, as well as the Senior Technical Advisor (STA), Johnson Odharo, participated in three major activities: attending the official UPIC launch ceremony; interviewing and selecting the short-listed candidates; and undertaking a joint familiarization and planning process with the Malawian counterpart organizations: Chancellor

College, MANEB, and MOEST, during which the Monitoring & Evaluation Plan and the Annual Workplan were drafted. In addition, the STA initiated work on a variety of administrative issues during July and August, as well as performing work necessary for the orientation and successful departure of the participants.

### 2.1 *Official UPIC launch ceremony*

The UPIC Program was officially launched with a ceremony attended by nearly 100 people at Chancellor College on June 25<sup>th</sup>, 2001. Representatives from USAID, the Government of Malawi, and all the partner institutions in both Malawi and the US were present. UMass was represented by a delegation of four people, three professors (Dr. D. R. Evans, PI & planning specialist; Dr. G. B. Rossman, Co-PI and policy specialist; and Dr. Sireci, Testing and Measurement specialist), and the Senior Technical Advisor (Dr. J. Odharo) in Malawi. The UMass team was in-country to carry out interviews and joint planning to ensure a rapid start to the UPIC activities. The large turnout reflected the degree of mutual commitment to the goals of UPIC on the part of all the partners.

### 2.2 *Interviewing and Selecting Candidates*

An advertisement about the post-graduate degree opportunities with both Virginia Technical University and University of Massachusetts was posted in *The Nation*. More than 140 applicants were reviewed in response to the advertisement for the UMass degrees. This pool was reviewed by Dr. A.J.R. Zoani of Chancellor College and Bill Mvalo of USAID and reduced to 51 (12 doctoral, 39 master's) using the primary criterion of meeting the minimal qualifications of having a bachelor's degree or a master's degree and relevant work experience. Subsequently, Dr. A.J.R. Zoani, Mr. Matthew Matemba (Executive Director, MANEB) and Dr. F.G.W. Msiska (Dean, Faculty of Education) were asked to further reduce the number to 33 (12 doctoral, 21 master's) who were called for interviews.

All 33 finalists were citizens of Malawi and represented the work interests that are consistent with USAID's strategic objectives and goals for the Advanced Degree Activity of UPIC. Of the 33 finalists, one-third (11) were women: 3 in the doctoral pool, 8 in the master's pool. While this proportion does not reach USAID's goal of 50% women, it represents a substantial effort on the part of those managing the selection process to ensure that qualified women were given full consideration. Throughout the process there was a substantial focus on transparency: information was shared regularly among the partners, and there was full cooperation between Chancellor College and UMass.

The 33 finalists were called for interviews scheduled for June 21 and 22, 2001. They were required to bring with them two letters of reference (one from their employer; one from an academic) and relevant transcripts. In preparation for the interview, all finalists completed the UMass (supplemental) application form; the interview panel drew on these written responses during the interviews.

Interviews took place over two + days (June 21, 22 and 26). Day 1 was devoted to interviewing 10 doctoral applicants; day 2, to interviewing 20 master's applicants. Three additional interviews (1 master's; 2 doctoral) were conducted on day 3. The interview panel was comprised of Dean Fred

Msiska, Dr. Dixie Maluwa-Banda, Dr. A.J.R. Zoani from Chancellor College; Dr. David Evans, Dr. Gretchen Rossman, Dr. Steve Sireci, Dr. Johnson Odharo from the University of Massachusetts; Mr. Matthew Matemba and Mrs. Kamlongera from MANEB; Dr. Katemba-Mwale, Director of Planning, MOEST; Mr. Bill Mvalo and Ms. Chris Kaliu from USAID. The panel asked similar questions to all applicants, with some variation depending on the applicant's background and interests. Upon completion of the interview, the panelists ranked the applicant on a scale of 1-4 (highest score was 4). 1 = qualified but not suitable; 2 = qualified and possible; 3 = qualified, suitable, and very strong; and 4 = excellent, outstanding. The scores were then averaged for the applicant. This scoring process allowed the panel to rank order the candidates for a preliminary ranking.

Of those interviewed 19 were judged by the committee to be the strongest candidates to proceed to the next stage of the process. They were requested to make an appointment and appear for the required medical exam. The names of those who passed the medical were then submitted to UMass. The final selection was made by UMass and CC, yielding 15 candidates who were admitted to degree programs. Subsequently, one candidate was discovered to be pregnant and was deferred for consideration in the second cohort of Masters candidates in the future. The composition of the first cohort of candidates at UMass is shown in Table 1, below:

**Table 1.**

Degree	Concentration	Total	Male	Female
Ed.D.	Policy, Planning & Leadership	2	2	0
Ed.D.	Testing & Measurement	2	2	0
M.Ed.	Policy, Planning & Leadership	6	4	2
M.Ed.	Testing & Measurement	4	3	1

Table 2 indicates the number of participants from represented Malawian institutions:

**Table 2.**

Degree	Concentration	MOEST	MANEB	MIE	CC	Domasi	Secondary/ TTC
Ed.D.	Policy, Planning & Leadership	-	-	1	1	-	-
Ed.D.	Testing & Measurement	-	1	-	-	1	-
M.Ed.	Policy, Planning & Leadership	5	-	-	-	-	1
M.Ed.	Testing & Measurement	-	1	-	1	1	1

### 2.3. *Joint Familiarization and Planning Process Between UMass and the Malawian Counterpart Organizations*

Realizing that an effective institutional collaboration requires that representatives of the two organizations spend time getting to know each other and working together, we organized a joint Planning Workshop. The purposes of the planning workshop were:

- to share information among the partners;
- to develop a better understanding of the structures of degree programs and expectations of CC and UMass;
- to arrive at a common understanding of the goals and structure of the collaboration as set forth in the UPIC documents; and
- to work together to develop a first draft of both the Annual Work Plan and a Monitoring and Evaluation Plan.

The UPIC/ADA Planning Workshop was held on June 27 & 28 with the following attendees: University of Massachusetts: Dr. David Evans, Dr. Gretchen Rossman, Dr. Steve Sireci, Dr. Johnson Odharo; Chancellor College: Samson MacJessie-Mbewe (faculty member educational foundations; member ADA steering committee), Dr. Dixie Maluwa-Banda (head, department of educational foundations; member ADA steering committee), Dean Fred Msiska (dean, faculty of education; vice chair ADA steering committee); Dr. Robert G Chonzi (head, department of Curriculum & Teaching Studies (CATS); member ADA steering committee; Dr. Foster Kholowa (faculty member CATS; member ADA steering committee); MANEB: Matilda Chiona (administrator); John Sam Chikoti (head, computer services department).

Dr. Rossman offered an overview of the ADA proposal submitted by UMass. The primary short-term goal is to upgrade skills of professionals working at Chancellor College, MOEST and MANEB. The longer-term goal is to develop the institutional capacity of Chancellor College to offer its own master's degrees in testing & measurement and policy, planning & leadership. Discussion ensued about specific aspects of the UMass proposal including: flexibility in the budget to offer short-term workshops or other non-degree training for current Chancellor faculty; purposes of local and international consultants; and linkages with other institutions

Through collaborative discussion and planning sessions between all attendees, a draft Monitoring & Evaluation plan and a draft Annual Workplan were created. Subsequently, an expanded draft of the Plan was produced by UMass and shared with members of the UPIC/ADA Steering Committee. That version was ultimately accepted as is by the Steering Committee and then officially approved by USAID/Malawi.

### 2.4 *Senior Technical Advisor Activities*

Dr. Johnson Odharo, the Senior Technical Advisor, was completing his obligations to his previous employer in Ethiopia and wasn't going to be available until September. However, because his participation during the startup phase in July and August was essential, he agreed to spend about eight weeks in Malawi during that period. He then had to return to Ethiopia for September and October to complete his obligations there before taking up permanent residence in Malawi.

The activities of the Senior Technical Advisor, Johnson Odharo, were primarily concentrated in the following four areas:

2.4.1. *To process the 1<sup>st</sup> cohort of students for studies at UMass*

Following a long period of planning and arrangements – getting the medical reports, making traveling arrangements and conducting orientation – the students departed on the 26 August and arrived safely on the 28<sup>th</sup>. The STA created a database containing pertinent individual information for the purpose of tracking and reporting progress, facilitating communication between the students and the project (in Malawi) and linking students with their families as needed.

2.4.2. *To prepare project office and install communication equipment (telephone/fax), subscribe to email and obtain post office box address.*

This objective is mostly completed due to the assistance of the Dean of Education (Dr. Fred Msiska) and the Chief Executive Officer (Mr. Saiti). A temporary office was assigned and direct telephone line installed in temporary office to be moved when the permanent one is ready; direct line for the UPIC computer room installed. Permanent office identified pending partitioning and furnishing. Quotation obtained and work will start as soon as AID releases funds. Mailbox acquired – Post Office Box 756, Zomba. Email account established with Malawi Net and the project email address is: Umass@Malawi.net. This address will be operational when the STA returns in early November 2001.

2.4.3. *To meet UPIC partners at CC and review Year One Workplan.*

Meeting of the UPIC Steering Committee with UMass held on 20 August 2001. Every member was enthusiastic and looking forward to a successful relationship. The essence of the UPIC project was presented and fruitful discussions were held. Questions were raised about capacity-building in CC and were answered in terms of the limit of the project funding restrictions. A revised and expanded Year One Workplan was submitted by UMass and was accepted “as it is” by members of the Taskforce Committee.

2.4.4. *To arrange personal housing for the STA*

The issue of housing for the STA has been discussed with the Dean of Education, Vice Principal and Assistant Secretary. A house has been identified and will be rehabilitated and ready for occupation when the STA returns in early November 2001. The project will be responsible for security and other necessities.

### **3. Activities and Progress at UMass**

At the University of Massachusetts Amherst, the first quarter of the project was comprised of three primary phases: pre-arrival logistics; arrival, orientation & settling-in; and course selection & attendance.

### 3.1. *Pre-Arrival Logistics*

Throughout July and August, the P.I.s, Project Coordinator, and Fiscal Administrator worked with USAID and UMass personnel to make travel arrangements, ensure the selected participants were expediently admitted to UMass (given the short time frame) and to secure accommodations, health coverage, course registration information, student identification numbers and to begin preparations for arrival and orientation. USAID/Malawi was very helpful in obtaining visas for the participants.

### 3.2. *Arrival, Orientation, & Settling-In*

Participants arrived in Boston, MA late in the evening of August 28<sup>th</sup>. They were met at the airport by the Project Coordinator and a Project Assistant. Participants were accommodated by the project in a hotel in Boston, and then proceeded to UMass the following day in a chartered bus. Upon arrival at UMass participants checked into their rooms and then enjoyed a welcoming lunch at the Center for International Education, where they were introduced to faculty, staff, and other graduate students. They also participated in a program and administrative overview session.

Both the Center for International Education and the International Programs Office prepared orientation activities for the Malawians. While a full copy of the orientation schedule can be found in Appendix A, highlights included:

1. Program and Administrative overview;
2. Cultural Night with all new international students at UMass;
3. Introduction to Academics & Programs of Study (including planning sessions with Academic and Peer Advisors);
4. Campus Tours with Project Coordinator and Peer Advisors, who provided assistance obtaining ID cards and email accounts;
5. Tours of Amherst and local shopping areas, and assistance obtaining necessary “settling-in” items; and
6. Gathering/Orientation with all new Center for International Education students.

Throughout their first week, the participants often remarked to project staff about how welcome they felt and how well their basic needs were taken care of.

### 3.3. *Course Selection & Attendance*

Soon after their arrival at UMass, the Malawian participants had meetings with their Academic and Peer Advisors, who were instrumental in helping participants to understand the requirements for their degrees, the required and optional courses they could take, and the process of registering for courses. Due to the nature of the degree program, the Testing & Measurement participants had certain required courses they had to take, while the Policy, Planning & Leadership students were able to select from a greater variety of courses.

The following is a sampling of courses in which participants are enrolled (Note: Actual courses taken by each candidate were determined through discussion with advisors, their background

experiences, areas of interest/concentration, and applicability to the goals of UPIC/ADA. Each student is taking about four courses.):

Testing & Measurement:

Introduction to Statistics & Computer Analysis  
 Advanced Theory & Practice of Testing  
 Educational Research Methods  
 Principles of Testing  
 Workshop in Academic Writing  
 Applied Multivariate Analysis I

Policy, Planning & Leadership:

Introduction to International Education  
 Introduction to Policy Studies  
 Educational Planning for Developing Countries  
 Education, Human Rights & the Environment  
 Theoretical Foundations of Organizational Analysis  
 Policy Studies in Educational Administration  
 Educational Research Methods  
 Workshop in Academic Writing  
 Organization for Curriculum Development

Coursework at UMass began on September 5<sup>th</sup>. Indications from professors and other graduate students are that they are very happy to have the Malawians in their classes, both because of the perspectives that they bring to class and the friendly manner in which they engage other students.

*3.4. Communications with Participants*

Based on many years of experience, the UMass staff knew that it would be helpful to have a communications structure with the Malawian participants. We therefore encouraged them to select a small group that could serve as their representatives to help resolve any issues that might arise. The participants selected three people to act as their representatives and the UMass staff have met several times with them to discuss concerns or questions related to housing, access to computers, academic programs, allowances and stipends. Having such a channel of communications has allowed us to deal with issues efficiently and in a timely manner.

*3.5. Meeting with Dean of the Faculty of Education at CC in Boston*

On September 6, 2001 Dr. David R. Evans (P.I.), Dr. Gretchen Rossman (Co-P.I.), and Dwaine Lee (Project Coordinator) met with the Dean of the CC Faculty of Education, Fred Msiska, who was attending a conference in Boston. The four hour meeting focused on several issues, including: progress at CC regarding housing for the STA; Fred's advice on how best to handle concerns of the UMass participants, as well as financial challenges at CC; planning for the courses to be offered in Malawi during the January – August, 2002 time period; the visit of the Vice-Chancellor of the University of Malawi to UMass in October; and plans to build a resource collection at the CC library to support the two Master's degrees.



#### 4. Challenges

Our experience during the first quarter has revealed several issues that will continue to be a challenge in the coming periods as we proceed with project implementation.

Resource limitations of Chancellor College - due to the financial stringency in Malawi, CC and the Faculty of Education find it very difficult to make the contributions to the partnership that are envisioned in the overall plan. This results in strong pressures on UMass to provide inputs and resources that are not in our current budget and were not foreseen in the structure of the Cooperative Agreement. We have done our best to respond to these needs in the short-run. AID has also helped out with the promise of a substantial grant to cover certain needs. It may be desirable to revisit the agreement in the future in order to find additional resources that can be made available to CC. As part of this problem, telephone and email communications with CC have been very limited, making regular discussions with the Dean difficult.

Expenses for the support of the participants have been higher than anticipated and will have an impact on the budget in the future. However, the result has been a stronger program that will better meet project goals.

#### 5. Deliverables and other Documents

<b>Deliverable</b>	<b>Projected Date</b>	<b>Status</b>
Annual Workplan	Annually (in August)	June 2001 – June 2002 Plan submitted August 7, 2001 and approved September 12, 2001
Monitoring & Evaluation Plan	August, 2001	Submitted August 7, 2001. Approved September 12, 2001
Quarterly Reports	Quarterly (by Oct. 12, Jan. 12, April 12, July 12)	June 12 – September 12, 2001 Quarterly Report is attached


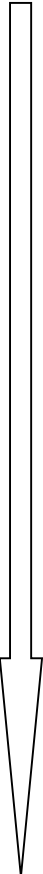

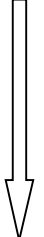



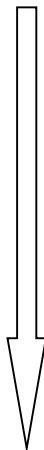

#### 6. Expenditure Report

See Attached

## APPENDIX A: Malawi Project - Itinerary - August 26 - September 1

	Sunday 26 Aug	Monday 27 Aug	Tuesday 28 Aug	Wednesday 29 Aug	Thursday 30 Aug	Friday 31 Aug	Saturday 1 Sept
8:00			5:40 Arrive London	8 - 9 Breakfast / Bring luggage to lobby	8:00 - 10:30 Breakfast/ Move into permanent rooms	Breakfast	Free Day to rest, walk around
9:00						9 - 11 Immigration Session - Bring Passports!!!	campus & Amherst, set-up room, hang out with friends, etc.
10:00				10:00 Charter Bus to UMass/Amherst	10:30 Campus Tour, ID cards, email, bank, etc	11 - 12 Social Security Cards	
11:00						12:00 Lunch (on your own)	OR
12:00						1:00 - 4:00 CIE New Student Gathering	Optional trip to Boston 8am - 10pm for \$35
1:00			1:45 Depart London	1:00 Arrive UMass / Settle in Rooms	1:00 Lunch (on your own)		OR
2:00				2:00 - 3:00 Lunch hosted by CIE	2:00 - 4:00 Introduction to Academics & Program of Study		
3:00				3 - 5 CIE Welcome & Program / Administrative Overview	4 - 6 Tour of Amherst, Shopping Mall, Stop & Shop, TJ Maxx, etc. with Peer Advisors (P.A.)	4:00 - 6:00 Free Afternoon	Optional trip to the Holyoke Mall with over 100 stores. 10 - 3:30 \$5
4:00							
5:00			5:15 Arrive Detroit				
6:00						6:00 IPO Closing Dinner - Newman Center Cafeteria	
7:00			7:25 Depart Detroit	7 - ? International Programs Office (IPO) Cultural Night in Student Union	Dinner out with P.A. (pay for self)		
8:00		8:10 Depart Harare			Evening Free to Relax, set up rooms, etc.	8:00 - Midnight Dance - Sky Box in Campus Center	
9:00	9:00 Depart Longwe		9:21 Arrive Boston	Ballroom (dinner included)			
10:00	10:00 Arrive Harare		Overnight at Comfort Inn - Logan Airport				
11:00	Overnight in Harare						
12:00							

## Malawi Project - Itinerary - September 2 - September 8

	Sunday 2 Sept	Monday 3 Sept	Tuesday 4 Sept	Wednesday 5 Sept	Thursday 6 Sept	Friday 7 Sept	Saturday 8 Sept
8:00	Free Day	Holiday - UMass Closed - Dorms Open		FIRST DAY OF CLASSES!!!  	CLASSES  		Free Day
9:00							
10:00	10:45 - 12:15 Church with Dwaine (optional)	10:00 - 3:00 Immunizations if you did not get them yesterday	10 - 12 CIE Center Meeting 			Meet with Peer Advisors - Schedule an Appointment for a time to meet  	
11:00							
12:00			12:00 Lunch				
1:00	1:00 - 3:00 Meet Dwaine outside Hills House (CIE building) to get immunizations	Free Day 					
2:00				Free Afternoon - Prepare for Classes Tomorrow			
3:00							
4:00							
5:00	Free Day 		4:00 - 6:30pm EPRA Gathering - Newman Center			Free Evening 	
6:00							
7:00			Free Evening 				
8:00				7:00 - 9:00pm Graduate School Reception in the Campus Center Room 1009			
9:00							
10:00							
11:00							
12:00							