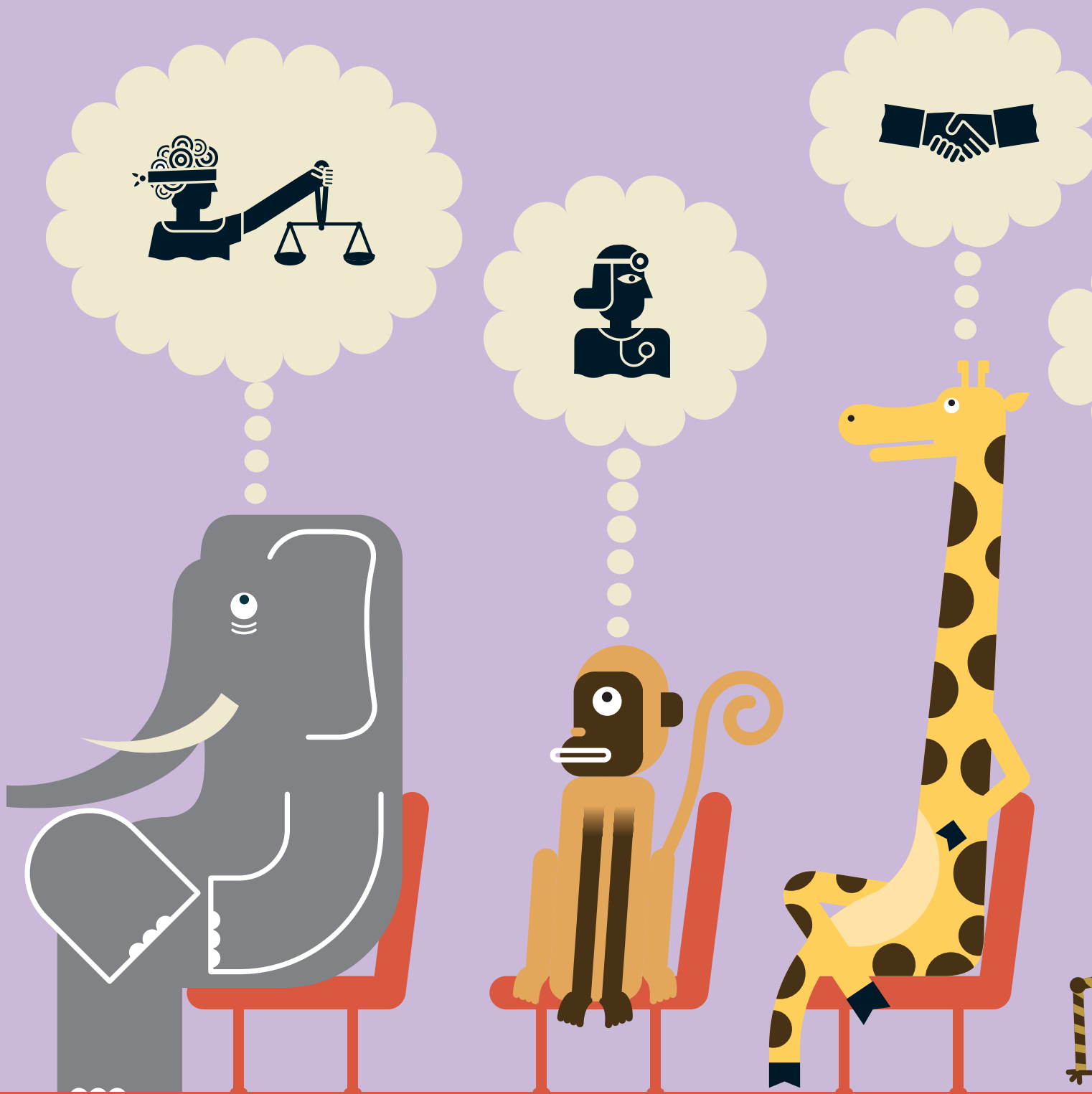


# Working with Quality

A practical guide for education campaigners





# Working with Quality



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# Glossary

<b>AAI:</b>	ActionAid International
<b>ANCEFA:</b>	African Network Campaign on Education For All
<b>CBO:</b>	Community Based Organization
<b>CSO:</b>	Civil Society Organisation
<b>ECCE:</b>	Early Childhood Care and Education
<b>EDUCO:</b>	Education with Participation of the Community (El Salvador)
<b>EFA:</b>	Education For All
<b>EFA-FTI:</b>	Fast-Track Initiative
<b>EI:</b>	Education International
<b>ESP:</b>	Education Sector Plan
<b>Eurodad:</b>	European Network on Debt and Development
<b>GCE:</b>	Global Campaign for Education
<b>GDP:</b>	Gross Domestic Product
<b>GMR:</b>	EFA Global Monitoring Report
<b>GNP:</b>	Gross National Product
<b>HIV:</b>	Human Immunodeficiency Virus
<b>ICT:</b>	Information and Communication Technologies
<b>IFI:</b>	International Financial Institution
<b>ILO:</b>	International Labour Organisation
<b>IMF:</b>	International Monetary Fund
<b>INGO:</b>	International Non-Governmental Organizations
<b>ISO:</b>	International Organization for Standardization
<b>MDG:</b>	Millennium Development Goals
<b>NFE:</b>	Non-Formal Education
<b>NGO:</b>	Non-Governmental Organization
<b>ODA:</b>	Official Development Assistance
<b>OECD:</b>	Organisation for Economic Co-operation and Development
<b>PRA:</b>	Participatory Rural Appraisal
<b>PRGF:</b>	Poverty Reduction and Growth Facility
<b>PTA:</b>	Parents Teachers Association
<b>SAP:</b>	Structural Adjustment Program
<b>SBM :</b>	School Based Management
<b>SMC:</b>	School Management Committee
<b>TIMMS:</b>	Trends in International Mathematics and Science Study
<b>UNDP:</b>	United Nations Human Development Programme
<b>UNESCO:</b>	United Nations Educational, Scientific and Cultural Organization
<b>UPE:</b>	Universal Primary Education
<b>WB:</b>	World Bank
<b>WTO:</b>	World Trade Organisation

# Building consensus on quality education in the EFA context

*“There is no quality without equality and equality without quality is not worth having.”*

## GCE convergences on quality

### OV

#### Overview: Defining quality, an ongoing process

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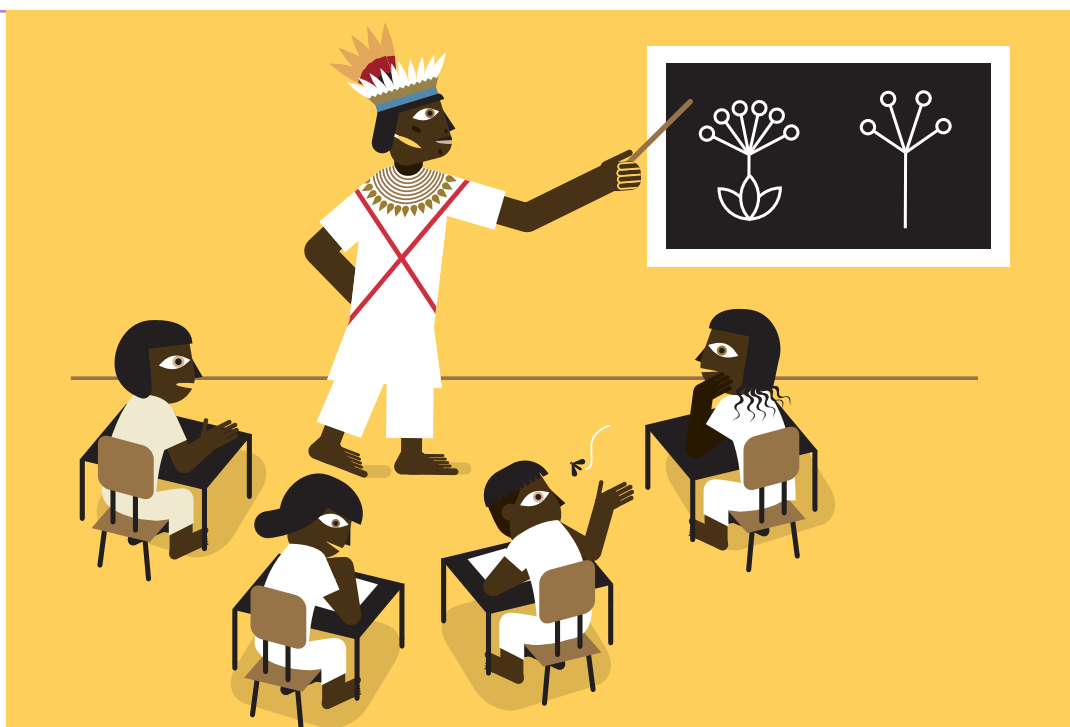
This resource pack is a product of an ongoing process undertaken by GCE to address the issue of quality education. The GCE World Assembly affirmed the need for GCE to place greater emphasis on quality issues in its national and international advocacy work, with its Resolution on Quality being voted top priority by the membership. Accordingly, the GCE 2008 work plan included a proposal on further development of our work on quality, to enable us to begin up-scaling our advocacy in this area. The aims included to research and develop consensus positions and supportive materials on a GCE vision of quality and how to recognize it, also exploring the differing viewpoints on acceptable assessments of learning outcomes.

### H!

#### Highlights: Quality fundamentals

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The development of a definition for quality education which could identify and translate the vision and mandate of the GCE constituency remains an important target linked to the consultation and workshop process. Towards that aim, this resource document hopes to present GCE members with a synthetic overview of the wide range of perspective and issues linked to the quality debate, in order for them to develop their own positions on a subject of such fundamental importance for the EFA goals. Although based on preliminary research as well as the added input of the 2009 workshops, the other main objective is to allow a consultation process to continue, so as to incorporate contributions from a larger range of members, including those expressed through the regional networks, as well as concrete developments resulting from forthcoming workshops and related quality advocacy campaigns.



Quality can be achieved when:

- **All teachers are properly recruited, trained, supported and paid:**

Teachers are at the heart of the educational process. The education and initial formation for teaching related studies must therefore be of high standards so as to attract motivated students and give them the necessary basis to successfully enter their profession. They also need to receive proper pre and in-service training based on relevant, accessible and participatory teaching-learning methods. This training must include hands-on experience in real learning environments and should build teachers' capacities to maximise inclusive educational approaches to ensure quality education for all learners. Moreover, quality training and support should be extended to include school administrators, inspectors and other staff essential to the education system, including the technical personnel. Teacher motivation can only be sustained through adequate salaries and the development of rewarding career structures, especially through measures helping them to focus their work and energies towards the most marginalized communities. Furthermore, members of these excluded and discriminated groups such as indigenous people, women, disabled people and members of ethnic minorities should be actively encouraged into the teaching profession. This inclusive process can strengthen the teachers to act as role models for learners who are particularly vulnerable to marginalisation and bring their particular personal and social knowledge to enrich the education system as a whole.

GCE 3rd World Assembly Resolutions extracts:

### **The Quality of Education**

Teachers need to be trained in active teaching-learning with hands-on experience in effective learning environments in order to deliver quality learning. This training should build teachers' capacities to maximise learning outcomes for a diverse range of learners.

- **Every classroom has enough textbooks, desks and learning materials:**

Where teachers are trained, their ability to promote quality learning can be constrained through issues such as class size and lack of materials. Ministries of Education and Finance must do long term planning to ensure minimum teaching conditions are met. This includes making adequate investment for hiring enough trained teachers to ensure everywhere and at any time, the maximum standard does not exceed a pupil teacher ratio of 35:1.

GCE 3rd World Assembly Resolutions extracts:

### **Financing Quality of Education**

GCE resolves to promote the definition of education expenditure based on quality criteria, using the concept of cost-per-pupil for quality education, as already developed by civil society organizations in some countries. This methodology estimates the cost of a quality education for every boy, girl, youth or adult, according to their characteristics and context. Both local and national budgets should be developed based on the cost-per-pupil for quality education.

- **The education process is based on appropriate curricula:**

Availability of appropriate curricula is another aspect which is crucial for the promotion of a learning environment conducive to quality education. This means that curricula should not only be relevant and open to local cultures, but should be based on the mother-tongue as the language of instruction without excluding the other official languages. Low / no cost resources developed by teachers are important as is the availability of a wide selection of attractive, interesting and developmentally appropriate reading materials. Finally, the public education system should be open to mainstreaming alternative education methods, especially those developed through the non-formal community based learning networks.

GCE 3rd World Assembly Resolutions extracts:

**Quality Education, Diversity and intercultural relations**

Education curricula, regardless of level (including teacher education and training) or modality (formal, informal), to include objectives and actions aimed at overcoming the discrimination and subordination that exist in all societies....

Centrality of learning should be reflected in relevance of curricula, learning environments, valuing mother-tongue as a language of instruction, without excluding the other official languages.

• **Schools provide a safe and welcoming environment**

All educational facilities should strive to offer a safe, healthy, friendly and learning conducive environment. Particular elements of concern are of course linked to the quality of the building's infrastructure itself: stability, protection from rain and sun, fencing to prevent animals and outside disturbances. The school grounds must also be free of all forms of violence, a threat to which girls are particularly exposed. Other factors conducive to a healthy environment include such facilities as appropriate access to drinking water as well as clean and sufficient sanitation, including enough separate facilities for girls.

GCE 3rd World Assembly Resolutions extracts:

**Violence and Quality Education**

In this decade for the promotion of a culture of peace and non-violence, it is important to comply with this Dakar Goal in order to ensure that the necessary non-violent life skills are acquired and respected by all children, staff, and management. Therefore again, the governments which have committed to these goals should make more resources available towards the significant reduction of violence in schools in order to retain and, in some cases, increase the quality of their education systems, and in order to promote a safe and conducive environment to learning, as schools ought to be.

• **Communities have a say in decision making:**

Aside from the participatory aspects of curriculum described above, the school environment should strive to develop meaningful spaces for interaction with all those who should contribute to the learning process. This should include helping the disadvantaged members of the communities, such as illiterates, to acquire the necessary skills to become active participants. Open, transparent, accountable, representative and democratic structures and spaces for teacher, student, learner, parents and community participation are essential, whether at



school, local or community level. This participatory process must however go hand in hand with the establishment of formal consultations among teacher unions, civil society organisations and social movements, and their governments in the entire EFA process at district, provincial and national levels.

GCE 3rd World Assembly Resolutions extracts:

#### **Financing Quality Education**

To encourage wide participation of civil society in the decision-making processes for the formation and implementation of national budgets. To promote training in budget monitoring and analysis, considering the right to education and the right of citizens to information, participation and accountability.

#### • **Positive learning experiences lie at the heart of the educational experience:**

“Learner outcome” vis-à-vis quality education still remains a major concern, and positive learning experiences are denied to many learners. Education needs to be aimed on the acquisition of key competencies and the essential learning tools that are critical in developing higher levels of skills, abilities and knowledge. This entails the development of a series of quality indicators covering the entire EFA agenda and allowing effective monitoring of progress towards all six goals. Furthermore, analysis of ‘quality’ should include “learner achievement” alongside ‘completion’ of the learning cycle; with a special focus on measuring progress in learner achievements for particularly marginalised groups.

GCE 3rd World Assembly Resolutions extracts:

#### **Financing Quality Education**

Education should be relevant, age appropriate, participatory, flexible, inclusive, protective and human rights-based in order to deliver quality learning outcomes to the full range of learners

**Interaction: Keeping it as short and concise as above, can the group either improve the previous statements or suggest new slogan type bullet points.**

# Quality education as a basic human right

## OV

### Overview: a binding global obligation

#### • A Universal right:

The right to quality education has been recognized since the Universal Declaration of Human Rights (UDHR) was adopted in 1948. Article 26 of the Declaration proclaims that: 'Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory, education shall be directed to the full development of human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among racial or religious groups'

#### • International legal framework:

The right to quality education has been enshrined in a range of international conventions, including:

- Convention against Discrimination in Education (CADE, 1960)
- The International Covenant on Economic, Social And Cultural Rights (ICESCR, 1966)
- The Convention on the Elimination Of All Forms Of Discrimination Against Women (CEDAW, 1979)
- The Convention on The Rights of The Child (CRC, 1989).
- ILO Convention 182 on the Worst Forms of Child Labour, an international agreement among member countries of the International Labour Organization to take immediate action to eliminate the most hazardous and exploitative forms of child labour.
- Other important international legal instruments in the struggle for the right to quality education are the ILO conventions defending the rights of teachers, teachers unions, indigenous people, and protecting abuse through child labour. Regional legal framework:

#### • Regional legal framework:

Countries are also usually bound by various regional treaties and conventions

that they might have signed or ratified, which often include articles and sections on quality education issues. Asia is an exception, being the only region that still doesn't have a human rights mechanism at the regional level. Regional normative texts with links to the right to quality education include:

**Africa:**

- The African Charter on Human and People's Rights
- The African Charter on the Rights and Welfare of the Child

**Latin America:**

- American Convention on Human Rights (ACHR) "Pact of San Jose"
- "Protocol of San Salvador" on Human Rights in the area of Economic, Social and Cultural Rights

• **National constitutions:**

National constitutions also usually contain various articles dealing with the right to education, including the state's responsibility in delivering free educational services of good quality to all. One very useful resource to check out your country's performance in this field is the Right to Education Projects' website which hosts a comprehensive constitution data base where the right to education has been identified (or found to be missing!) in the fundamental legal text of your country. You will find up to date and accurate information on the right to education according to your fundamental legal text, as well as your country's status in terms of ratification of international and regional treaties and conventions.

**H!**

**Highlight: Education and the 4 As (Availability, Accessibility, Acceptability and Adaptability):**

The concept of the 4 As was developed by the former UN Special Rapporteur on the Right to Education, Katarina Tomasevski, as one way to assess and mobilize towards the right to quality education. However, these 4 As are not definitive. Whilst they are an extremely useful way of explaining the right to education in terms of tangible factors, they are not necessarily the standard used in every international treaty and as such should not be treated as a generic, comprehensive guide to what the right to education means under every law. The 4 As are to be respected, protected and fulfilled by the government. But there are also duties on other actors in the education process: the child as the privileged subject of the right to education, the child's parent

who are the 'first educators', as well as teachers. By using a participatory process the 4 As framework can become a tool to enable people to think through what the right to education means to them, and compare their current reality to this ideal context. The 4 As can be summarised as follows:

- **Availability :**

That education is free and government-funded and that there is adequate infrastructure and trained teachers able to support education delivery.

- **Accessibility :**

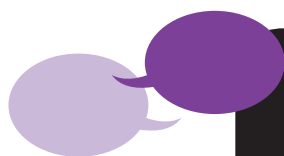
That the system is non-discriminatory and accessible to all, and that positive steps are taken to include the most marginalised.

- **Acceptability :**

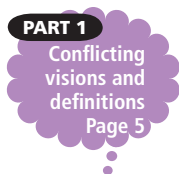
That the content of education is relevant, non-discriminatory, culturally appropriate and of quality; that the school itself is safe and teachers are professional.

- **Adaptability:**

That education can evolve with the changing needs of society and contribute to challenging inequalities, such as gender discrimination, and that it can be adapted locally to suit specific contexts.



**Interaction:** Participants are given a copy of their constitution and asked to identify passages relating to the right to education. Additional questions can be raised such as: Is education free? Is education compulsory and if so up to what age? Facilitator can also detail which of the above conventions have been signed/ratified/adopted by their governments. What obligations derive from these texts for their government?



## Quality and the EFA vision

OV

### Overview: Quality in the World Declaration and the Dakar Goals

Before engaging in any serious attempt to unravel the meaning of quality education, one must first stop to reconsider the contours of our shared vision of education. The 2000 World Education Forum in Dakar had seen the showcasing of a very strong coalition of international stakeholders, including the World Bank, united around a solid rights-based declaration which firmly entrenched the participation of CSOs at all stages and levels of education planning. The basis of our engagement in favour of the EFA goals is firmly grounded in the definition of education provided by the Dakar World Education Forum Declaration:

*“We re-affirm the vision of the World Declaration on Education for All (Jomtien 1990), supported by the Universal Declaration of Human Rights and the Convention on the Rights of the Child, that all children, young people and adults have the human right to benefit from an education that will meet their basic learning needs in the best and fullest sense of the term, an education that includes learning to know, to do, to live together and to be. It is an education geared to tapping each individual’s talents and potential, and developing learners’ personalities, so that they can improve their lives and transform their societies.”* *Education For All: Meeting Our Collective Commitments*; article 3 *World Education Forum Dakar*. Although the basic concept underlying this EFA declaration can be described as a comprehensive vision based on cross-cutting and complementary objectives, it is also deeply-rooted in one non-negotiable fundamental: education for all throughout life is a right and not an economic variable to be adjusted to market requirements or available resources.

Quality was already a strong element of the 1990 Jomtien declaration and a specifically central subject of the Dakar discussions, ultimately leading to this issue being promoted as one of the six EFA goals (see below). With the advent of the new millennium agenda however, the same group of players rallied behind a pro-growth policy which excluded the quality objective and promoted only two of the Dakar goals. This development also presented the danger of dissociating the latter from the integral EFA objectives.

**Dakar quality goals: Goal N°6:**

“Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills”. Other articles in the Dakar Framework: “ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality”;

**Dakar vision for quality:**

“What is clear is that quality must not suffer as access expands and that improvements in quality should not benefit the economically well-off at the expense of the poor, as has happened, for example, in the expansion of early childhood care and education.”

*“Investment in education contributes to the accumulation of human capital, which is essential for higher incomes and sustained economic growth.”* (Priorities and strategies for education, A World Bank review, 1995).

**Interaction: compare the above Dakar declaration with the above statement and extract main interpretation differences on the role of education. Identify how the specificities linked to each vision can lead to contrasting definitions of quality education and different ways of monitoring progress towards it. Participants, individually or in groups, choose one of the statements and propose a definition of quality education and some relevant indicators.**

## PART 1

Quality: a  
battle for  
meaning  
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## Quality and Resources

## OV

## Overview: The reality of education aid

- **Broken promises:**

One of the strongest and most widely quoted articles of the Dakar Framework for Action was the pledge from donor countries and institutions that “no country seriously committed to basic education will be thwarted in the achievement of this goal by lack of resources”. However, IFI’s and G8 nations did not live up to this commitment. After refusing to finance the EFA education plans developing countries had been specifically asked to draw up by 2002 in accordance with the Dakar Framework of Action, the IFIs and donor countries established a new set of criteria for obtaining funds, based on the MDGs and essentially restricted to formal primary education goals submitted to tight public spending control. Although this new EFA-FTEI funding initiative did temporarily increase global commitments to basic education, hitting a peak of US\$ 5 billion in 2005, this amount has decreased ever since, with less than US\$ 4 billion committed in 2007 (the latest year for which data is available). It is presently estimated that the available funds cover a mere 25% of the US\$16 billion a year needed to finance education plans providing quality education for all.

- **Shifting the debate away from adequate resource levels:**

Faced with the blatant failure of most developed countries and financial institutions to meet their financial commitments, the WB is increasingly developing the argument that education, and quality education in particular, is not so much dependant on resources as it is on efficient management and institutional reform. A recent WB publication accordingly stated “there is no relationship between spending and student performances across the sample of middle and higher income countries with available data. Investigations within a wide range of countries, including a variety of developing countries, further support this picture (...) The lack of substantial resource effects, and class size effects in particular, has been found across the developing world, including countries in Africa, Latin America and Asia.” However, a closer look at the very unequal global spending patterns on education easily reveals that the developed countries do in fact spend a lot of money on education... for their own children. Less than 40 dollars a year spent per primary student in Congo against close to 10 000 in Luxembourg. Western Europe alone accounts for

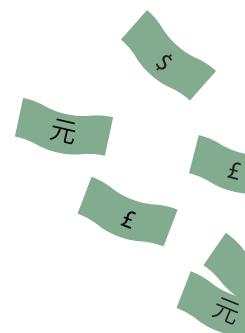
55% of the world's total spending on formal education although they represent less than 10% of the 7-20 school age population

- **Good and poor payers:**

Sufficient and well employed resources are fundamental to any educational objective and crucial to meeting the EFA goals. No sustainable progress in any of the relevant quality fields can hope to be achieved if adequately costed budget costs (especially recurrent ones such as teacher salaries) are not met through international donor support. **Facts:** only 5 of the 22 OECD bilateral donors gave 90% or more of their fair share in aid to Basic education in 2006. US, Japan, Germany and Italy have by far the worst track record of the rich countries, collectively giving a mere 10% of what is needed to keep their own promises of every person having a chance of an education by 2015. By contrast the Netherlands is without contest the best performing country, giving seven times more than its fair share to basic education.

- **Domestic financing.**

Apart from aid, public investment in education is of course linked to national wealth. But it is also highly dependent on strategic political choices: the share of wealth converted into budget revenue and the proportion of public expenditure dedicated to education. Although many governments have increased their budgets for education since Dakar, just as many could be doing much more. Unsurprisingly, wealthier countries tend to spend more on education, essentially thanks to higher tax revenue collection levels. Low-income countries in sub-Saharan Africa, and South and West Asia, tend to invest the smallest proportion of GNP in education. In sub-Saharan Africa, a majority of countries spend less than 4% of their national income on education. However, there are also marked differences highlighting good and bad performers even among the low-income group. For example, the Central African Republic allocates 1.4% of GNP to education while Ethiopia devotes 6%. One very worrying piece of information: between 1990 and 2006, the share of national income devoted to education in developing countries decreased in 40 of the 105 countries with data.



### Challenges: The impact of the free-market system



- **Fiscal evasion:**

Or how the multinational corporations plunder developing countries. Each year, more than 1 141 Billion US dollars disappear from the developing countries to be placed on accounts in rich countries in the North. This represents close to ten times the amounts they receive as ODA each year. Fiscal fraud by multinational corporations is responsible for more than half of this capital flight, which because of tax evasion constitutes nothing less than outright theft of public incomes. False invoicing and pricing arrangements between branches of the same group alone cost 178 billion US dollars annually in fiscal losses to government budgets of developing countries. According to UN estimates, this is more than ten times the amount needed annually to reach the EFA goals and equivalent to the total sum required to meet the 8 MDG goals and halve global poverty by 2015.



- **Financial Crisis:**

As we write these lines, the world is still facing one of its worst economic meltdowns since the early 30s. It is therefore still very early at this stage, to present a comprehensive overview of the economic and social impact that this crisis will have on donor commitments and repercussions for education programs in developing countries. What is already certain, however, is that the negative consequences will particularly affect the poor. Even before the current crisis, poverty based inequalities were the major obstacles to progress towards EFA goals. According to recent World Bank forecasts, as many as 90 million more people could be trapped in poverty as economic growth slows around the world in 2009, on top of the 130-

155 million individuals pushed into poverty in 2008 because of soaring food and fuel prices. Past experience shows very clearly that when families plunge into poverty, they are much less likely to be able to afford direct and indirect education costs. This means more out of school children, especially girls, and a probable increase in child labour. The rise in unemployment levels, in poor and rich countries, will certainly trigger important negative consequences for education on the African continent. Indeed, remittances are a key source of income for rural families and can provide a financial buffer to allow for

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The financial  
crisis  
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younger children to receive an education. The expected decline in remittances (both national and international) will therefore seriously affect education access. Finally, according to World Bank projections, more than 1 billion people could go chronically hungry. This would not only reverse gains in fighting malnutrition, but would permanently wipe out all educational opportunities for millions of children in Africa, who cannot be expected to learn on an empty stomach.

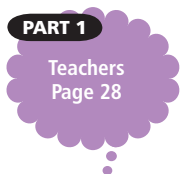


**Benchmarks:** Government should spend at least 20% of their budget on education. 50% of the education budget should be invested in Primary education.

**“Education on the Brink”. GCE’s report on how the IMF’s policies, governance and loan conditionalities negatively affect EFA goals**

The Spring Meetings of the World Bank and International Monetary Fund (IMF) are a ‘make or break’ moment for whether the G20 deal will benefit the millions of children and adults struggling to get an education. “Education on the Brink” shows that without significant changes to the IMF architecture and removal of conditionalities, the poorest nations will remain unable to lift themselves out of recession. Education systems will be left to languish without desperately needed funds and the teacher workforce, already squeezed, is likely to face further pressure. The future of millions of children and illiterate adults now rests on whether the new cash injection given by the G20 to the IMF is accompanied by a substantive overhaul of macroeconomic policy frameworks.

**Interaction: Questions about known budgetary levels for the selected country. Without statistical back-up (on assumptions and general perception) test the number of participants who are under the impression that government education budget has increased (since 2000), that education ODA has increased, that the government has reached the internationally accepted 20% benchmark.**



## Quality Teachers

OV

Overview: The teacher crisis.

- **Lack of teachers:**

Without the recruitment and retaining of a sufficient number of qualified teachers, all education plans and policies are likely to fail and the EFA goals will not be met. If teachers are at the heart of education, they should also be at the centre of programmes, national budgets and development aid. This implies the recruitment and the retaining of a sufficient number of well qualified teachers operating in a work-friendly and learning conducive environment. Better working conditions, higher salaries, the respect of trade union rights and access to in-service training, are some other crucial ingredients towards improving the so-called “teacher motivation”. At primary level alone more than 18 million extra teachers are needed if every child is to receive a quality education. Teacher shortages have led to dramatic increases in Pupil Teacher Ratios (PTR) in many developing countries, with classes of up to 150 pupils.

- **Limits on public spending:**

Neo-liberal policies put governments under massive pressure to limit wage bills. Governments respond by imposing wage or recruitment freezes or the hiring of non-professional, non-qualified contract, untrained teachers who receive lower pay, fewer employment benefits and no job security. These policies also put heavy constraints on other essential school personnel (technical and secretarial staff) as well as on teacher trainers and inspectors.

- **No ODA for recurrent costs:**

It is estimated that less than 17% of aid funds (13% of FTI funds) are directed towards teachers’ salaries, while this expenditure share typically accounts for between 70 and 90% of the entire education budget. Contrary to the dominant perception, such a profile does not necessarily signal an unbalanced government expenditure. As human resources are at the centre of the public education system, the large share spent on salaries is essentially indicative of the weak overall budget capacities characteristic of least developed countries.



**Challenges: False economies and real solutions**

- **The recruitment of contract and para-teachers:**

Contract teachers are staff employed on short-term contracts, whereas para-teachers are unqualified or under-qualified personnel. Both categories are seen to be recruited at national or decentralised (provincial and school) levels while contract staff are often but not necessarily also unqualified teachers. This policy is often presented as an unavoidable transitory measure which must be enforced to face the rise in enrolments. However, without an ambitious upgrading programme geared towards integrating this work force into the common public teaching profession, this short term strategy shows very poor results. The World Bank's own research has concluded that the employment of 'contract teachers' has a direct causal link to a decline in the quality of teaching – due to reduced attractiveness of the profession leading to lower quality applicants, and increased absenteeism as a result of fewer incentives and lower job security: “students of regular teachers systematically outperform those of contractual teachers, even after controlling for prior achievement, household-, school- and classroom characteristics. Variation in teaching methods, absenteeism, and resentment over “unfair” pay across contract types do not explain the performance gap. Instead, our findings suggest the reforms triggered a reduction in supply of high quality teacher entrants...If, indeed, the negative effect of contractual teachers is mostly due to a decline in the quality of those choosing to enter teaching, the long-term negative effects of this policy change could be enormous. (E. Vegas and J. De Laat, Do differences in teacher contracts affect student performance? World Bank 2003) As stated in the latest GMR report “From an EFA perspective, increasing the supply of teachers while lowering quality standards is false economy.”

- **Teacher education – Initial and continuing:**

The quality of the education and training institutions is essential to ensure that the professional development of teachers can meet the increasingly complex challenges of the modern globalized world. This first depends on the allocation of sufficient resources for such programs to function adequately. However, these institutions also need to be well articulated to the realities of the school system and their own curriculum must not only be relevant to the national environment and EFA challenges but also focused on reflective practice, active critical learning, innovation and creativity. Teacher's professional training and development must be guided by coherent national policies. Too often however, the career links between pre-service and in-service training are weak. Another challenge is the question of insufficient standardization across countries in

the teaching profession, both in terms of teacher training duration (from no training at all to up to five years) and teacher education qualifications and requirements. This poorly structured professional environment affects the attractiveness of the teaching career and often leads to the lowering of entry standards.

- **Teacher Participation:**

Teachers and Teachers' Unions are the least welcome guests of the institutionalized participatory mechanisms put in place by the IFIs and governments to design, coordinate and evaluate education policies and plans. They are often viewed as a potential source of opposition to the "smooth" implementation of education and governance reforms, if not directly targeted by governments who feel threatened by any form of political opposition or trade union freedom. One organization actively defending teacher's rights and Teacher Union participation in the education policy process is Education International: a global union federation of organisations representing nearly 30 million teachers and other education workers, through 401 member organisations in 172 countries and territories. In 2003, EI undertook a Europe for Education campaign which has enabled the passing of a resolution, at



the European Parliament, on increasing development cooperation towards education programs. Amongst other activities, EI is working with the World Bank regarding its EFA "Fast Track Initiative" and its impact on teachers' salaries as stipulated in its indicative framework. EI is also addressing the issue of teacher shortage to achieve EFA by 2015 by holding conferences on non-civil service teachers.

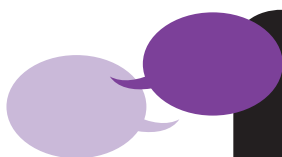


### Benchmarks:

**PTRs:** A maximum Pupil-teacher ratio of 40:1 is a benchmark for EFA and an indicative guideline in the FTI framework, while GCE's World Assembly adopted the recommendation that no classroom should have more than 35 pupils per teacher.

**FTI:** Indicative FTI Benchmarks tend to play a very negative role by indirectly trying to put limits on the Government spending towards teachers. One such FTI benchmark recommends that teacher salaries should not exceed 3.5 times GDP per capita, while another states that at least 33% of recurrent spending should go towards non-salary expenditures.

**ILO:** An important text is the 1966 UNESCO/ILO Recommendation concerning the status of teachers. The Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (CEART) was set up in 1967 to enable close cooperation between the ILO and UNESCO to monitor and promote the 1966 Recommendation.



**Interaction:** Apart from hiring non-professionals, have the participants make a list of possible strategies used by government IFIs to reduce the teacher wage bill or the high Teacher/pupil ratios: possible answers (redeploying teachers who have to work in several schools, closing down smaller schools, double shifts, reducing the number of subjects taught, freeze on salaries, performance pay, distance learning/teaching, etc.). Are any of these solutions sustainable for EFA?

- Have teacher's salaries increased in your country, are they relatively well off, working conditions, trade union rights?

## THE PARKTONIAN RECOMMENDATIONS 8th APRIL 2006 EDUCATION INTERNATIONAL AND ACTIONAID INTERNATIONAL

Forty senior EI and AAI representatives from across India, Nepal, Nigeria, Malawi, Tanzania, Cote d'Ivoire, Burkina Faso, Senegal and Brazil met in the Parktonian Hotel, Johannesburg, South Africa over three days in April 2006. A background paper "Building a Strategic Partnership on the Need for Quality Teachers to Achieve EFA" served to frame discussions on a range of key issues. There was a clear convergence of political understanding that served to build strong relationships of trust between the teacher union and ActionAid delegates. Recommendations emerged around seven key areas including the Teacher issue

### ON NON-PROFESSIONAL TEACHERS

The spread of non-professional teachers is happening at an alarming rate, promoted by the World Bank and backed up by distorted research. Employing non-professionals is being seen as a low cost and permanent solution – yet this is having a devastating impact on quality and equity in education. EI and AAI recommend:

- There should be no more recruitment of non-professional teachers. It is a violation of children's right to quality education and leads to discrimination against poor children!
- Government should be the employers of all teachers in the public education system, with salaries set through national processes of collective bargaining.
- Governments should undertake workforce planning from now to 2015 to determine the number of teachers needed year on year to get all children into school in acceptable class sizes (and a practice of ten-year comprehensive demographic-based education planning should always be maintained). Governments should then invest in significantly expanding teacher training facilities to ensure that sufficient numbers of professional teachers are trained.
- In situations of unexpected or rapid expansion (e.g. following abolition of user fees), governments should first bring into the workforce any unemployed trained teachers or retired professional teachers – and seek to attract back into frontline teaching any trained teachers who are otherwise employed. If there is a remaining gap then, in consultation with teacher unions, emergency measures may be taken to bring in a temporary new cadre - who should be given accelerated opportunities for full professionalization within a maximum of five years. Emergency measures may also be needed in situations of conflict but there should be explicit plans for time-bound transition agreed from the start.
- Clear agreements should be established on the minimum standards for pre-service teacher training, with reference to ILO / UNESCO standards. There is a need improve the quality of present teacher training provision and to develop regulatory mechanisms to ensure all facilities deliver quality training.
- National teacher unions should actively encourage existing non-professional teachers to become members.
- Existing non-professional teachers should be integrated into the professional workforce. They should be given access to quality distance education courses, backed up with face-to face formal courses in vacations and school-level mentoring and support, leading to public examinations which must be achieved within a maximum five-year timeframe.
- There should be an end to single-teacher schools. Progress should be made rapidly towards having one teacher per grade, at least one classroom per grade, adequate sanitation facilities, and a balance of female and male teachers.
- All teachers should have access to good quality professional development courses and ongoing training.

## Quality Schools

### OV

#### Overview: A learning environment

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Claiming the appropriate number of schools to cater for all learners is not sufficient to guarantee an appropriate quality environment for learning. All educational facilities should strive to offer a safe, healthy, friendly and learning conducive environment. Most national surveys demonstrate however, that existing schools rarely meet these conditions, with particularly negative and discriminatory effects for girls' education.

### H!

#### Highlights: Quality factors

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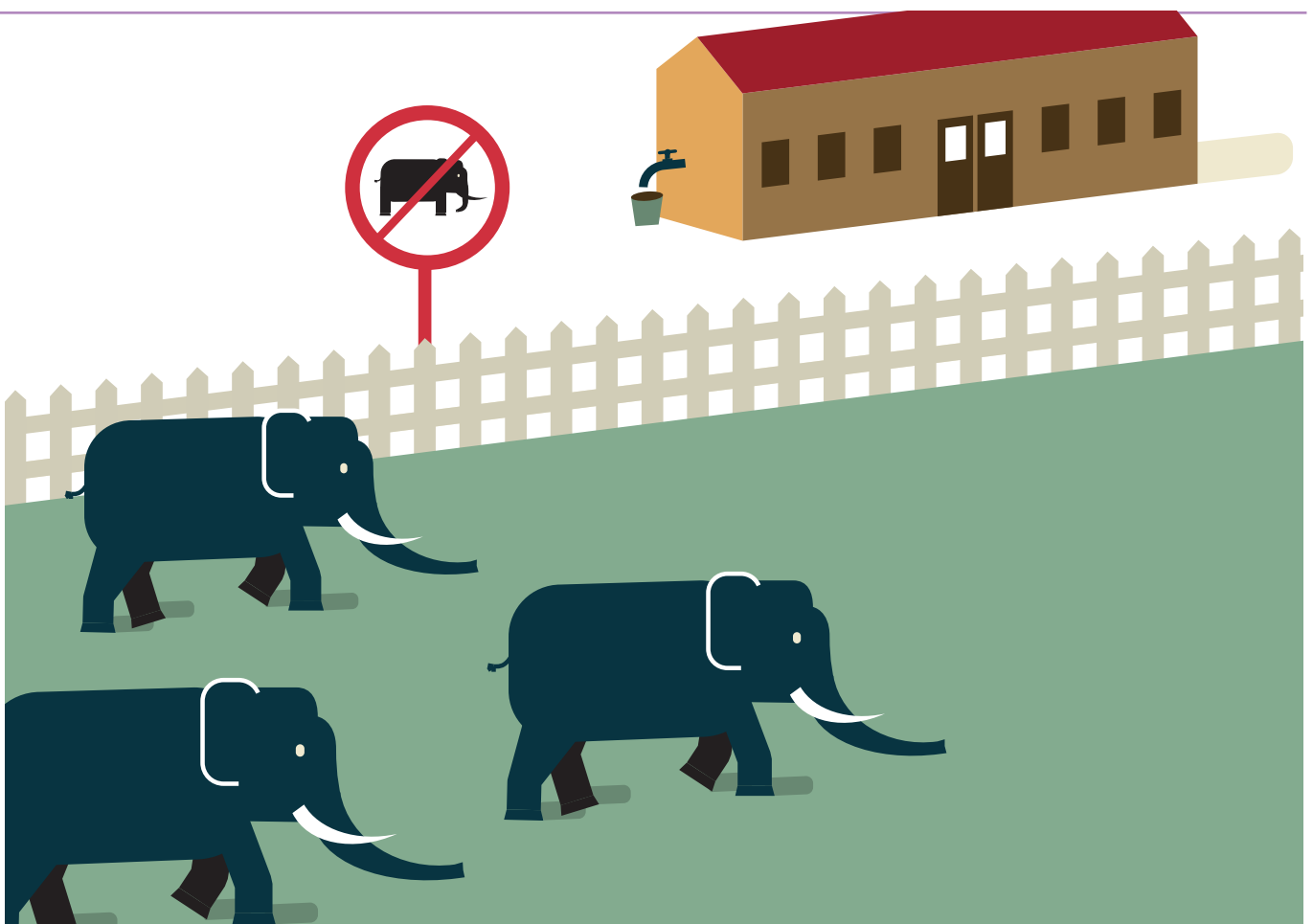
- **Safe schools:**

Particular elements of concern are of course linked to the quality of the building's infrastructure itself: stability, protection from rain and sun, fencing to prevent animals and outside disturbances. The school grounds must also be free of all forms of violence, a threat to which girls are particularly exposed. Recent work by Human Rights Watch has shown, for example, that one in three girls in South Africa experiences sexual harassment, while a 2004 ActionAid research demonstrated that the violence faced in and around schools was a significant factor in forcing girls out of the education system. The school regulations should incorporate and make reference to children's rights (which should be advertised on school premises), and all school related staff be given basic information and training concerning the implementation of these rights.

- **Healthy schools:**

Factors conducive to a healthy environment include such facilities as appropriate access to drinking water as well as clean and sufficient sanitation. Providing separate sanitation facilities for boys and girls has proven to be a particularly effective way of attracting and retaining girls in schools. A school sanitation project in India ([http://ddws.gov.in/popups/SSHE\\_in\\_India\\_Paper\\_2004.pdf](http://ddws.gov.in/popups/SSHE_in_India_Paper_2004.pdf)) indicates that schools where basic amenities are available show not only better enrolment but also better academic performance of students. Performance data from project schools has shown tremendous improvement vis-à-vis non-project schools. The average percentage of marks obtained by boys and girls under project schools were 81 and 80.5 per cent respectively





compared to the 53.7 and 51.7 per cent obtained by boys and girls of non-project schools. In areas where malnutrition affects children's capacities to attend school and follow classes, school feeding programs are shown to have a crucial impact on learning achievements, especially at primary level. One of the most worrying findings to come out of UNESCO's latest GMR, is that one in three children in developing countries (193 million in total) currently reach primary school with brain development deficiencies due to malnutrition.

- **Friendly schools:**

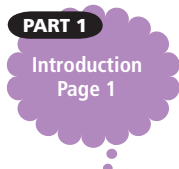
Adequate and sufficient school material and basic furniture are obviously essential to ensuring that quality education can take place. This includes enough tables and chairs for learners, as well as teaching material and facilities (blackboard, electricity, lighting, etc...). Access to extra-curricular activities and recreational facilities, including safe playgrounds and libraries-documentation centres should not be seen as superfluous luxuries as they are known to constitute important ingredients in developing certain more disregarded aspects of the education's role in terms of socialization and tolerance. Schools should also try to develop formal and informal participation facilitating and

encouraging child participation in school affairs: recreational and educational clubs, tutoring systems, children assemblies, representation on SMC, evaluation and disciplinary committees, etc.



**Interaction: Group 1°: Fill in the drawing of a school with post-its representing the essentials necessary to transform it into a quality school.**

**Group 2°: Same thing with drawing of a classroom.**



## Quality and Access



### Overview: EFA means “For All” – barriers for access

The first step is to get all children to school, and provide education and literacy to those who are deprived of these essential public services. While access does not ensure quality, there can't be quality education without it. Direct and indirect costs for families are the strongest proven barriers in terms of access. Countries that have taken measures to abolish schools fees have seen huge increases in access.



### Challenges: Quantity and Quality: a public service obligation

- **No trade-offs**

The increase in enrolment rates is often described as one of the primary reasons for the drop in quality of education (measured by numeracy and literacy skills or overcrowding of classrooms). It is true that if the increase in access is not met with at least the corresponding increase in finances, resources and teachers, the overall quality level is most liable to fall. However, as a non negotiable basic right, access to school should not be limited by the availability of adequate funds. Increasing access and increasing quality must go hand in hand.

Poor quality education is in itself an important factor contributing to school drop-out rate increases. Learners and parents who experience or witness low standards and achievement levels are liable to decide that the added value of schooling is not worth the costs or sacrifices. This is of course particularly the case in environments where girls and boys are often used as labour or potential

income resources at a very early age.

- **Private and alternative provision**

Community based, faith and private for profit schools should of course be included in studies of the educational offer and subject to general quality standards, but according to the EFA agenda and international conventions, they should come as extra options NOT replace public education offers. According to a recent WB publication (The Role and Impact of Public-Private Partnerships in Education): “Across the world, enrolment in private primary schools grew by 58 percent between 1991 and 2004, while enrolment in public primary schools grew only 10 percent.

Distance education can complement and enrich classroom activities but is not acceptable as a replacement.



**Country example:  
Tanzania.**

In the 1970s, under the leadership of Julius Nyerere and with donor funding Tanzania had achieved near universal primary education (UPE) reaching enrolment peaks of 98% in 1980. Inadequate economic growth and donor-driven notions of cost-sharing, cost-recovery and user-charges led to the introduction of primary school fees. Following these measures, enrolment started to decline and reached a bottom low of 57% in 2000. The abolition of school fees in 2001 triggered, as in other countries, a huge increase in the numbers of school children. Nevertheless, the government's plan that all children would be at school by 2005 did not materialize as numbers of entrants in primary school started decreasing in 2004. Estimates have been that 10% of 7 year olds do not even enrol. The biggest obstacle, as before was the cost; education was made cheaper but not free. Previously levied fees were replaced by a capitation grant of about \$10 per school child per year, 40% of which was earmarked for learning materials. That funding formula was based on the available funds rather than the real costs of quality education for every child.

**Interaction: Question to participants about what they believe are the most important obstacles to education in general, in the region, in their country. Are there any financial incentives to help people access educational services? How can a country progress in enrolment rates without sacrificing on quality? Is there an increase in non public education, who subsidizes it, is there some form of government control?**

**PART 1**  
Social  
development &  
equity  
Page 12

## Quality and Equity

**OV**

### Overview: No quality without equality

Social, cultural and other inequalities have a deep negative impact on progress towards EFA in general and the quality of education in particular. Equal access to schools and equal distribution of educational services of good quality must constitute the aim, if not the reality of the public education mission. The quest for equality covers geographical imbalances, marginalized or "hard to reach" groups, etc., not only in terms of access but also in terms of content (relevant educational material) and process (inclusive and equitable teaching

practices). Inequality issues should be brought to the centre of the EFA agenda, as inequalities are so common and stark inside the borders of developed and developing countries alike. Unfortunately, it is precisely this information about the uneven access to quality education across regions, ethnic groups and most importantly socio-economic classes, which is the least readily available. Apart from the more widely covered MDG related issues of gender equality, disparities based on poverty, ethnicity, language, race, caste, residence and religion are very rarely examined and usually not the object of any particular focus or specific investment programs in the education sector framework plans. This is one reason why no monitoring of quality education can claim to be really effective without the development of disaggregated data and indicators.

**H!**

### Highlights: Inequalities

Even the poorest countries and those furthest away from the EFA goals have some schools with good quality standards and high achievement levels. Although these isolated islands of excellence almost always cater to the privileged urban elite and receive higher funding than average they also prove that quality education is possible anywhere on this planet with adequate resources and strong political will. Research shows that unequal learning outcomes are most pronounced within countries and most often linked to socio-economic status. These disparities are detected at every level: between regions, communities, schools and classrooms. Students of lower socioeconomic status generally score lower than students from more advantaged backgrounds. However, the degree of these wealth related education outcome inequalities varies considerably from country to country, which tends to suggest that political will and vigorous redistribution policies by governments can have serious positive impact.

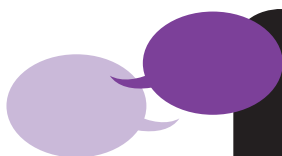
- **Income inequalities within countries.**

The 2009 EFA GMR has calculated that only around half of the poorest 20% in sub-Saharan Africa, and South and West Asia progress to grade 5, compared to more than 80% for the wealthiest quintile. In Latin America, grade 9 attendance levels for the wealthiest 20% are similar to those observed in the rich countries of Western Europe, whereas figures for the poorest 20% compare with those in sub-Saharan Africa. The same GMR report also highlighted how income-based inequalities determined the average number of school years children would obtain. In Mozambique, a child from the poor 20% averages 1.9 years of education, compared with 5 years for someone from the

richest 20%. In India, the gap between the rich and the poor rises to close to seven years of schooling.

- **Socio-economic status.**

Some assessments have shown that performance gaps linked to socio-economic status are higher in Europe and the US than in developing countries. One report tried to determine which factors were the most important for pupil achievement between occupation, parents' education, family income/ household wealth and 'home literacy'. Household wealth (family possessions) was the most important in East Asia and the Pacific, and in Latin America and the Caribbean, while occupation was found to be the most important socio-economic status component in North America and Europe.



**Interaction: collective discussion and mapping of various categories of population who are likely to be the most affected by poor quality of education services.**

**PART 1**Students  
Page 29

## Quality learning process

**OV**

### Overview: Many ingredients and a complex recipe

At the core of education, one finds the learning process, a much more subjective, intrinsically qualitative and therefore more challenging component to measure through simple input monitoring alone. Most people vividly remember the favourite class and/or teacher(s) of their childhood, probably in balance with the bad memories of particularly boring or despotic tutors. However, the ingredients which contribute to making a classroom an enjoyable, enriching learning experience for all participants, are varied and complex. The teachers' personal skills, inclusive and participatory teaching methods, relevant curriculum and a general sense of education's wider political and social mission are just some of the most important factors that can transform a stuffy classroom into a transformative process stimulating learners to become active participants in their community, full members of their society and empowered citizens of the world.

## H!

**Highlights: Positive factors****• Inclusive and participatory teaching methods**

Form and content are very difficult to dissociate, especially in the teaching process. What could be further from quality learning than the unfortunately all too common situation where learners' participation is limited to a monotone repetition of uncontextualized grammar rules or rote learning of too theoretical or irrelevant knowledge. Participatory classroom techniques are not particularly difficult to acquire or implement for a teacher, but they often require breaking with some traditional one/way communication models. Specific pre and in-service training designed to support these teaching methods are essential, but can be complemented by peer-guidance, inputs learner/parent groups and involving teachers in their design. Quality education for all also obliges the teacher to recognize that learners are never homogenous and should not be treated and taught as if they were. Everyone has unique characteristics, interests, abilities and learning needs and therefore the teaching process must be designed and implemented to take account of the diversity of such characteristics and learning needs, even if this means taking more time to involve "slow-learners".

**• Relevant curriculum**

Quality curriculum starts with the obvious prerequisite that the contents are free from religious or political indoctrination while being simultaneously open and tolerant towards a wide range of different cultures and beliefs. Although the struggle against discriminatory contents in school text books has made steady progress worldwide, sexist, racist or xenophobic stereotypes have unfortunately not totally disappeared even in some of the reputedly most developed and tolerant countries. A recent school book for first graders in Sweden was ordered out of the curriculum after education CSOs revealed the text portrayed girls as being less skilled at mathematics than boys. Another important issue often linked to discrimination of cultural minorities, is that of the adequate provision for linguistic diversity in the learning process. Although the issue of the school medium of instruction is still a highly debated issue, especially in countries where the former colonial language is perceived as the vernacular for social promotion, the learning process must be based on the need to learn the national language and culture while preserving one's own. Finally, the school curriculum should be open, but not entirely submitted to, the local

cultural and social specificities. This means keeping open the channels of interaction with the wider school community, not only to ensure more relevant content and facilitate learner identification, but also to help identify and give access to local knowledge and expertise in the educational process.

**PART 1**Democracy  
Page 10**• Education for a democratic society**

In a democratic society, education is organically linked to democracy: its task must be aimed at educating conscious citizens, defining common identities and working towards more solidarity between men, women, communities and nations. This is why education is also a collective responsibility which determines the future of our societies. Teachers, educators, parents, CSOs and members of the community in general must participate in the shaping of this educational vision for a sustainable democratic world. As an empowering process connecting the individual and the collective, education in democracy cannot be submitted to any obligation of results and its efficiency cannot be measured in terms of performance. Quality indicators must therefore integrate these broader values and aims. In addition to the child's academic achievements, quality measurement must integrate education for citizenship: acquiring the capacity to actively participate in social affairs and representative democracy, critical and analytical skills, solidarity initiatives, creativity and autonomy.

**Interaction:**

- Participants list one or two best memories of their educational experience. For each case, try to list the various factors which made this teacher/class a particularly enriching experience.
- Who can point out democratic/participatory structures that are essential to directly contribute to this educational mission? (Possible answers: PTAs, student associations, school councils, SMC, Teacher Trade Unions, etc....)



## PART 1

adjusting the  
education offer to  
market needs  
Page 14

## Quality and Outcomes

### OV

#### Overview: What and how to measure

Keeping kids in school is not enough, they need to learn. However the debate on the education content and the way to measure educational achievements is a much contested one. While the World Bank is increasingly pushing for the implementation of standardised testing and promoting competition as a recipe for improving outcomes, many analysts suggest that the causes and the solutions to the very real issue of learning outcomes are multiple and complex.

### H!

#### Highlights: Tests and bad marks

- **International assessment structures**

The most obvious and widely accepted monitoring field is basic numeracy, reading, writing and literacy skills. The main international educational assessment structures working on monitoring these skills are: Southern and Eastern African Consortium for Monitoring in Education Quality (SACMEQ), Programme d'analyse des systèmes éducatifs des pays de la CONFEMEN (PASEC), Programme for International Student Assessment (PISA), Trends in International Mathematics and Science Study (TIMSS)



- **Performance disparities between countries**

For 11 of 14 countries with available data—Albania, Brazil, Colombia, Egypt, Ghana, Indonesia, Morocco, Peru, the Philippines, South Africa, and Turkey—the share of fully literate students in recent cohorts is less than a third. In Ghana, South Africa, and Brazil, only 5–8% of each cohort reaches literacy. The remainder, more than 90% of the population, are illiterate—because they never enrolled in school, because they dropped out of school at the primary or early secondary level, or because even after completing lower secondary education their grasp of basic cognitive skills was too low to be viewed as literate. In contrast, 42% of a cohort in Thailand, 55% in Armenia, and 63% in Moldova can be viewed as literate at the end of lower secondary schooling.

- **Disparities within countries.**

In India, 6,000 ninth-grade students in the states of Rajasthan and Orissa were given science and mathematics tests modelled on the TIMMS evaluation project. More than the very poor average scores (30% to 40% of the children were unable to reach the lowest international benchmark), the most striking result was the highly unequal score distribution. The difference between the bottom 5% and top 5% was among the highest in the world, with students in the latter group not only scoring higher than the best students in other low-performing countries, but also higher than the average students in all but the best-performing countries.

- **Alternative evaluation methods**

Many teachers have developed alternative grading approaches to evaluate learner outcomes with a more differentiated approach. One main trend is to put more focus on learning as a process where achievements are relative to each pupil's individual progress rather than solely on the basis of his performances rated in relation to others in his class. This acknowledges differential growth at different stages, and allows the teacher to put more focus on the individual needs of the students.



### **Challenges: Limitation and negative effects of testing**

#### **Qualitative limits**

As mentioned in the section on the quality learning process, education must also develop human potentials - like analytical and communication skills, critical thought, understanding and participation in society - which are much

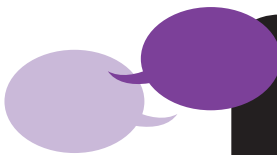
more difficult to quantify through standardized tests or exams... but are just as essential. Another serious limitation of measuring the quality of learning outcomes through tests and national exams - reflected in scores and grades - is that this does not tell us if what children have learnt is meaningful to them. But there are also some directly negative and counter-productive effects of testing both for the teachers and the learners.

### Teaching to the test

Classes exaggeratedly centred on exams tend to reinforce a traditional teacher-centred process, where teachers teach to the test and learners memorize facts in order to pass exams. These teaching strategies are globally less effective than those which are based on active engagement by all learners. They are also liable to promote internal competition which can stimulate learning achievements for some, but is also very likely to provoke a lowered self-esteem for poorly performing students.

### Competition between schools

In schools relying entirely on rigid and standardized achievement examinations, teachers are often forced into a supervising role for a pre-determined and strictly enforced curriculum to the detriment of their autonomy as pedagogues. Competition and choice based on examination results can also lead to differentiation within the public system, reinforcing unequal access and distribution between "good" and "bad" (performing and underperforming) schools.



#### Interaction:

- Point out that there is also debate as to whether or not these international measurement standards are best suited to provide accurate assessments of student performance, particularly in developing countries. Question to participants: Why are these international monitoring structures questioned? (issues of culture, language, etc)
- List qualities, skills we would expect to find in a person who has received quality education.



## Quality and the other EFA goals

**OV**

### Overview: The neglected goals

The EFA quality agenda is holistic and multi-dimensional: literacy, early childhood, youth and adult learning, for example, are an often neglected but integral aspect of quality education components.

- **ECCE**

There are very strong links between ECCE and educational performance. Ex. In Nepal, 95% of the children who attended pre-primary went to primary, 75% for those who didn't. Unfortunately, more than half the donors spend less than 2% on ECCE compared to aid directed to primary education.

GCE 3rd World Assembly Resolutions extracts:

**The 4 Cornerstones on Early Childhood Care and Education - A platform to Ensure Strong Foundations for All Young Children:**

**Cornerstone 1:** Start at the beginning

Integrate early stimulation, child development, and parenting information into prenatal, early health, nutrition, and education services

**Cornerstone 2:** Get ready for success

Ensure access to at least two years of quality early childhood programs prior to formal school entry,

**Cornerstone 3:** Improve primary school quality

Increase investments and improve the transition from home or preschool to primary school and the quality of learning in Grades 1-3 by:

- Providing teachers with knowledge and skills for supporting early childhood development
- Giving children adequate learning materials,
- Ensuring smaller classes.

**Cornerstone 4:** Include early childhood in policies

Address Early Childhood in all national policies and plans across sectors, including Poverty Reduction Strategy Papers (PRSPs), Common Country Assessments (CCAs) UN Development Assistance Framework (UNDAF), one UN Plan documents, Education for All (EFA) Plans and Fast Track Initiative Plans



As underlined by numerous reports, literacy helps people understand decontextualized information and language, whether verbal or written. This is one reason why literacy can often lead to further learning, and literate environments are conducive to creating better conditions for quality education to take place. Educated parents – whether through formal schooling or adult programmes – are more likely to send their children to school and to help them with their work. Examples from Bangladesh and Nepal clearly show that children’s school attendance increased when their parents attended literacy classes. Country level assessments in Uganda revealed that literate parents were not only more likely to help their children through their learning process, but were also more actively involved in the participatory structures put in place at school level, such as PTAs. The greatest benefits have been observed from case studies in Nepal, South Africa and Turkey where the literacy courses included specific sessions on how parents can support their children in school and inform them about the content of the curriculum. Surveys from GMR in several countries, including Bolivia, Nepal and Nicaragua, show that women who participate in literacy programmes have better knowledge of health and family planning, and are more likely to adopt preventive health measures such as immunization or to seek medical help for themselves and their children.

#### **The Literacy and Community Development Programme (LCDP) in Vietnam**

Vietnam has achieved significant results in education. In addition to net enrolment rates of over 90% in primary education, the total national literacy rate is also high, at 90.3% and 94% for adults and youth (24 years and above) respectively. Yet despite the impressive progress, there are still gender, regional and ethnic disparities in access to education and in literacy rates. For example, there are a huge number of illiterate people over the age of 35, most of them living in remote areas and from ethnic minorities or women. As a result, the rate of illiteracy in remote areas makes up more than 35% of the national total yet they are only 13.5% of the national population. Illiteracy rates are particularly high among ethnic minorities and women. Illiteracy stands at 75% and 88% among ethnic Dao and H’mong communities respectively. Such groups therefore risk being marginalised perpetually from mainstream society. The Literacy and Community Development Programme (LCDP) was initially implemented in two districts of Vietnam in 2000. The programme targets poor and marginalised groups (such as ethnic minorities and women) in remote areas, particularly youths and adult aged 18 years and above. Between 2500

and 3000 learners / participants are enrolled into the programme per year, 80% of whom are women. Since its inception, the programme has been expanded into 11 districts across the country and, to date, more than 12,000 participants (of whom more than 9,500 are women) have enrolled into the literacy classes. The programme has an overall retention rate of 80% - 90%, which indicates that the integration of literacy and community development projects generates strong motivation for continued learning among learners.

**Benchmarks:****• Learners per facilitator ratio.**

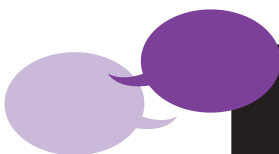
Accepted international benchmarks for literacy classes: minimum ratio of one facilitator to 30 learners and one trainer/supervisor to 15 learner groups.

**• Minimum cost per learner.**

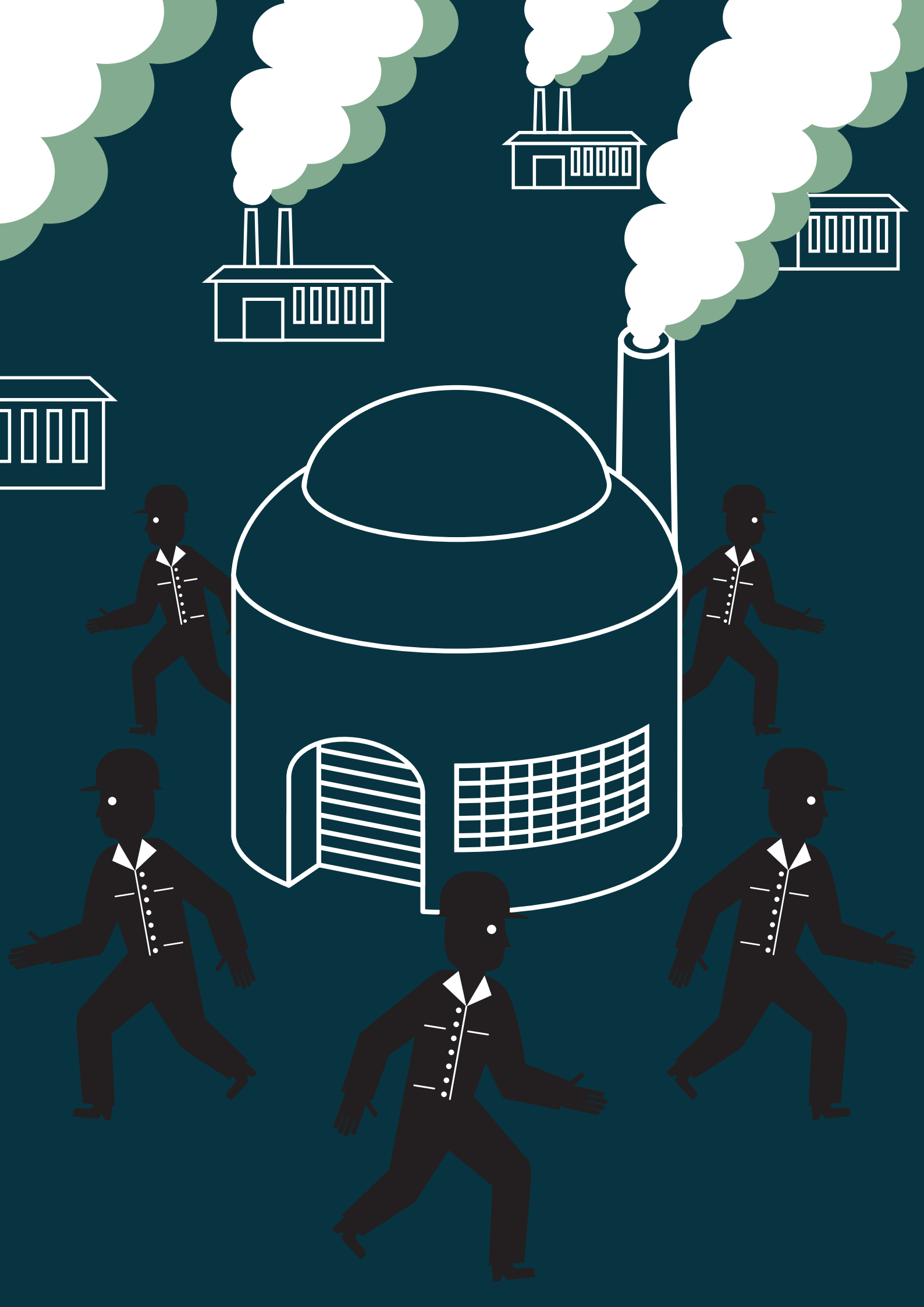
Minimum acceptable cost per learner for quality literacy programs: between 50 and 100 US \$.

**• Government spending.**

Benchmark for government spending on Literacy: at least 3% of their national education sector budgets.



**Interaction: Can participants name some government led programs in Literacy. Do they feel that the above benchmarks are being met? What is the role of CSOs?**





# Quality management of education

## Introduction

In recent years, the quality issue has been pushed at the top of the education agenda by IFIs and most donors. The World Bank has developed a particularly forceful communication strategy to impose its own perception of the factors conducive to the development of quality education, with profound and concrete impacts on the national educational policies developed globally. Applying the service-provider/client concept to the educational field, the WB has equated quality with the market oriented views of quality control, where productivity and performance are the ultimate and overriding set of criteria.

PART 1

Privatization  
from within and  
without  
Page 18

OV

**Overview: The World Bank's "alternative" to investment in quality public services. Education as a commodity**

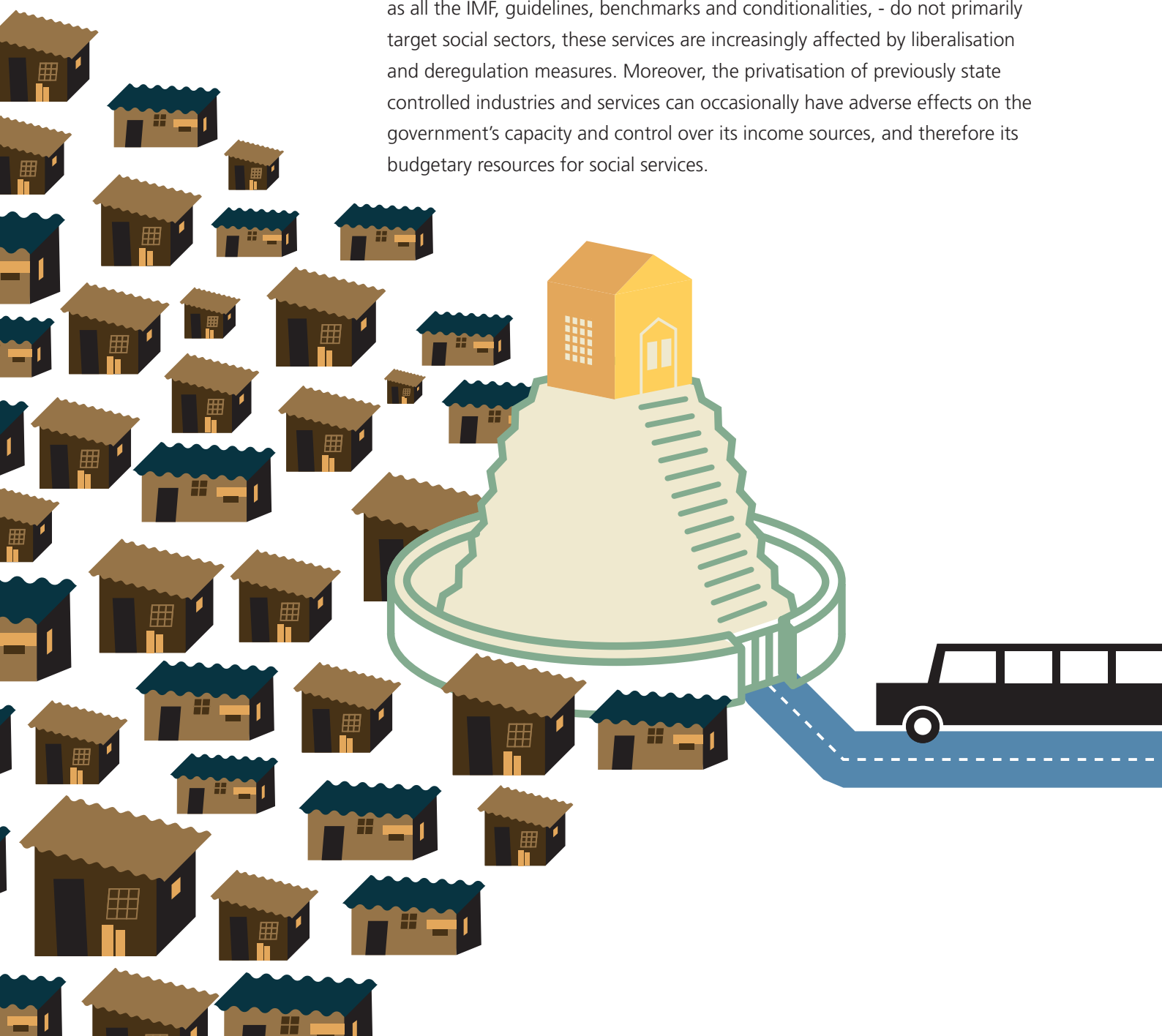
- **The service provider/ client relationship concept**

*"Poor people—as patients in clinics, students in schools, travellers on buses, consumers of water—are the clients of services. They have a relationship with the frontline providers, with schoolteachers, doctors, bus drivers, water companies. Poor people have a similar relationship when they buy something in the market, such as a sandwich (or a samosa, a salteña, a shoo-mai). In a competitive-market transaction, they get the "service" because they can hold the provider accountable. That is, the consumer pays the provider directly; he can observe whether or not he has received the sandwich; and if he is dissatisfied, he has power over the provider with repeat business or, in the or, in the case of fraud, with legal or social sanctions." (Quote from World Bank Development Report 2005 "Making services work for poor people")*

With access to a fundamental human right being equated to buying a sandwich, it is easier to understand why the WB has become quality focused: winning the battle for the definition of quality is a Trojan horse strategy bringing education one step closer to being considered a commodity, an investment for the development of human capital which should abide by all the laws ruling economic growth.

- **Conditionalities**

While the Bank claims that only 16 per cent of their operations have privatisation-related conditions, recent independent research by Eurodad comes to a very different conclusion. In the report entitled “Untying the knots. How the World Bank is failing to deliver real change on conditionality”, Eurodad uncovers that up to 71 per cent of all grants and loans come with some direct or indirect form of sensitive policy reform, more than half of which are privatisation-related. Although the World Bank incentives for reforms - as well as all the IMF, guidelines, benchmarks and conditionalities, - do not primarily target social sectors, these services are increasingly affected by liberalisation and deregulation measures. Moreover, the privatisation of previously state controlled industries and services can occasionally have adverse effects on the government’s capacity and control over its income sources, and therefore its budgetary resources for social services.



- **Education Sector Blueprints for reform**

An increasing number of donor countries, faced with the need to justify the stagnation of ODA and broken commitments, have come to wholeheartedly support a concept which conveniently says that quality education is not so much dependent on resources as it is on efficient management and institutional reform. The four principal (and closely interlinked) strategies for “cost effective” quality management are: choice and competition between schools, school-based management and autonomy, accountability for outcomes (with performance based incentives) and formal calls for community participation. All these formulas are of course closely connected to the push for decentralization, which constitutes the single most important component of all the ESP investment programs.

If you take the time to go through the literature on education or any Education Sector Plan, and particularly the sections and documents dealing with quality education you will inevitably find the following:

- Decentralization
- School based management and Autonomy
- Participation
- Competition and Choice
- Performance & Accountability



## Decentralization

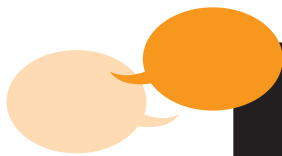
*“Decentralization – the transfer of political, administrative and fiscal authority to lower levels of government – is one of the most pervasive governance reforms of the past two decades. While decentralization has often been driven by fiscal motives, governments invariably present it as an exercise in bringing decision making closer to the people affected.”* Extract from GMR 2009

Decentralisation is without a doubt the single most important component of all the ESP's investment programs. Decentralisation components account for a record 90% of WB lending to primary education. These education reforms redistribute authority not only from central to local government but more importantly from the political authorities to the schools providers and technical administrator. The devolution of budgetary and personal authority to the school manager often represents the necessary foundation on which all the concrete strategies for education services deregulation are built, particularly SBM and performance based competition within the public system.

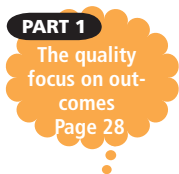
The official discourse, fed by many of the CSO's own hopes, is that decentralization reforms can pave the way towards a more participatory democracy, bringing political power and decision making bodies closer to the people. And it is very true that many developing countries' education systems have suffered from highly bureaucratic, centralized and inefficient administrations, with corruption and wastage, lack of accountability and transparency as the most prominent negative effects.

However, without a very active policy of financial transfers towards the poorer regions of the country, experience is clearly showing that decentralization tends to increase inequalities of access to education rights. This crucial regulating dimension needed to counterbalance local and provincial inequalities does not fit very well with the primarily fiscal motives behind most decentralization reforms which tend to favour, to the contrary, a general reduction in state expenditure and intervention. The recent GMR gives us the following example “In Viet Nam, fiscal decentralization has gone a long way ... but the only

form of revenue autonomy for district and commune governments is in the introduction of fees in areas such as education and health. User charges have been increased in both areas, with damaging implications for equity.”



**Interaction: examples of decentralisation enforced in education policies. Exercise: Participants are placed in two groups: one listing the advantages of decentralisation, the other exposing the risks.**



## School based management and Autonomy

*“Concern with educational quality has seldom been at the heart of School Based Management – the reason for its introduction being related more to financial and managerial arguments.”* Extract from Background paper prepared for the Education for All Global Monitoring Report 200 “The Quality Imperative School-based management (SBM): does it improve quality?”

Another key feature of governance reforms has been the rise of the SBM techniques with the associated transformation of the head-teacher into a school manager. SBM started in the 1970s in the US and the UK, once again importing private sector concepts and objectives to the educational field, but the school manager himself is a relatively new actor in the developing countries’ public sector. The new education sector policy reforms pushed by the WB are giving the principal increased powers to directly control the school’s organizational budgets, including pay and recruitment of teachers. Started in rich and middle income countries, in recent years this concept has been aggressively advocated in a range of Low Income Countries as well. Nepal, for example, has been a particularly targeted testing ground for the SBM model, with the WB pushing for complete transfer of power to “community-managed schools”. As stated by the OECD, these trends are aimed at encouraging “managers to focus on results by providing them with flexibility and autonomy in the use of both financial and human resources”;

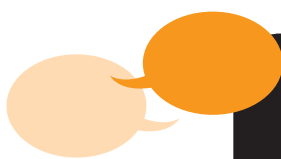
According to the latest GMR report, 11% of all education projects supported by the WB between 2001 and 2006 included mandatory school-based management components. This might not seem much but the figure is rising fast and these programmes represent today around US\$1.74 Billion in education financing, or approximately 25% of the WB's education money.

Aside from the characteristics already described above, some of the key features of SBM include:

- Attention to outputs and performance rather than inputs and process
- Low-trust contractualisation of school environment relationships
- Enforcement of client provider relations

Embedded in an educational framework and driven by an EFA agenda, increasing school autonomy could have the potential to empower teachers and parents by giving them more input in school decisions. It could also be directed at helping schools be more open and responsive to the needs of the local communities, and in particular that they be more inclusive towards the more disadvantaged groups as well as the cultural minorities.

In reality unfortunately, increased autonomy in education very often means more autonomy from the centralized government but very rarely additional creative independence in terms of curriculum or pedagogy. In fact, the overall autonomy of the educational field has been considerably reduced since the 60s, mainly through the increasingly close links developed between economic and educational frameworks (the quest for higher integration between what people learn and what the labour market needs). The prospect that greater autonomy and school based management enable more flexible, responsive and innovative teaching has not been demonstrated by any concrete evidence on the ground. Because school based management increases their logistical responsibilities, head teachers often end up spending more time on administration than on leadership, with less time available to support pedagogical initiatives and quality improvement by teachers who are increasingly asked to focus on exam results.



**Interaction: What do participants think of the following example: The mistrust system has been taken up by a NGO backed project in India where security cameras are introduced in each classroom in order to reduce teacher absenteeism. Should this be reproduced if this example produces results?**

## Participation

*“school autonomy and local participation are not panaceas...they are outcomes of insufficiently understood processes more than they are conditions that can be produced by decree... The EDUCO experience also teaches us the contradictions implicit in trying to implement a strategy to promote community participation relying on a top-down strategy of educational change” (p.164).*

Fernando Reimers

Participation is another term that is closely associated to the quality debate. Civil society participation at all levels and stages of education policy planning, development and implementation was one of the main recommendations formulated by the 2000 Dakar framework for Action. If some coordinating mechanisms have been put in place between government, donors and CSOs, a large majority of the national education networks and coalitions around the world still express dissatisfaction in terms of the limited and poor quality of their involvement at policy level.

Rather than national level coordination, most education policies promote participation through community and especially parent involvement at the school level. Accordingly many ESPs promote the creation or the strengthening of formal administrative structures such as School Committees, village education committees or PTAs, officially to facilitate parental and community involvement in school management. Decentralised participation has always been a very strong demand expressed by CSOs who have been at the centre of projects and campaigns advocating parent and community involvement in schools. A significant number of CSOs have actually been developing and concretely delivering alternative, non formal and popular education based on empowering participatory methodologies and practises, which include capacity building programmes to make SMCs more democratic (see Reflect approach).

IFI's and donors are not opposed to Civil Society Participation, quite to the contrary. In their thrust for privatization and limitation of government services, Non-government organizations can (and often do) become objective allies;

either because they are in political agreement on this specific issue (private schools association, for ex) or simply because as service providers they are running schools and want more official recognition.

Community or CSO serviced schools are usually viewed in a very favourable light by the WB, as illustrated by this example from Salvador.

*“Responsibility is sometimes transferred to communities—or to the clients themselves. El Salvador’s Community-Managed Schools Program (Educo) gives parents’ associations the right to hire and fire teachers. That, plus the monthly visits to the schools by the parents’ associations, has reduced teacher—and student—absenteeism, improving student performance.”*

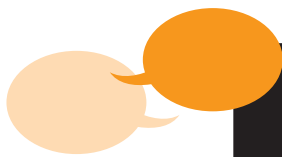
The WB is indeed particularly interested in participation leading to more “flexible” work regulations; a strategy to short circuit, bypass or contain the existing social, political and labour associations and particularly useful to weaken the teachers’ bargaining powers (particularly through their teachers’ unions).

However as signalled by the introductory quote, the Education with Participation of the Community (EDUCO) program in El Salvador - a program designed explicitly to bring more community participation into education through community management of schools and teacher accountability to parents – has also come under severe criticism. Most findings underlined that the EDUCO schools had neither better achievements than regular schools, nor more community participation.

Many reports also show that the new or strengthened participatory structures at school level are often limited to in-house administrative items with very few opportunities to debate, impact or link up with education policies, especially at provincial or national level. Another very serious and well documented danger is that without “empowerment strategies” to overcome the deep imbalances in power relations linked to wealth, gender and socio-cultural disparities, this decentralised participation process often increases inequalities. When the WB experts refer to community participation, the abundant research they have themselves commissioned makes it impossible for them to ignore that it often implies a head-teacher (manager) talking to a couple of teachers and one or two of the more privileged parents of the community: the very people who will usually be the most receptive to their choice, performance and accountability policies.



Participation is therefore a very complex and contradictory theme: while it can and should lead to successful involvement and better organization of civil society at grassroots and community level, it can also give the edge to more dynamic and resourceful schools or communities to exploit opportunities and therefore disadvantage other communities and schools competing for the same resources. Which is why strengthening the links between local and national level civil society participation, while maintaining a strong regulatory role of government support is so important for education equity for all.



**Interaction: Do local Parent's association's link up at the provincial or national level? Exercise: Ask participants to list at least 3 different ways in which the term participation can be used in the educational sector (for ex: Community involvement in school affairs, financial contributions in nature or in kind, enrolment rates ...)**



## Performance & Accountability

*“Accountability and performance management mechanisms, sometimes including performance-related pay, are again techniques of reform which were transferred into the public sector from business, but these origins are now no longer acknowledged. These techniques are intended to ensure that educational processes are made more transparent but can also have powerful effects in re-orienting the work of schools and teachers and changing the values and priorities of school and classroom activities. ...These techniques operate to make schools more like businesses, and classrooms become forms of production.”* EI, Hidden privatization in education

Performance and accountability management mechanisms, which increasingly include performance-related pay, are common education policy reforms that can be found in almost all ESPs worldwide. Although these techniques are directly transferred from the business world into the public sector, these origins are totally hidden.

Most education sector plans present these techniques as means of ensuring that educational processes are made more transparent and open to community control on student and teacher performances. But even on this secondary objective of transparency, the main push is towards rewarding success, the exact opposite of an equitable system where allocation of education finance would be inversely related to outcomes, with those in greatest needs receiving the most support.

The main intended effect of this quality management however, is to re-orient the work of schools and teachers and to changing the values and priorities of school and classroom activities. Some of the impacts include:

At the classroom level:

- A focus on the development of a narrow range of subjects and skills needed to pass tests.
- Narrowed curriculum and extensive time devoted to test preparation.
- Lowered self-esteem of poorly performing students

At the school level:

- To encourage teachers and schools to exclude from tests kids who are least likely to do well.
- As academic performance is often related to wealth, rewarding schools for test score will penalize the few “good” schools that enrol the poor.
- Introduction of systems of appraisal and performance review of teachers

At the state level:

- Tying teachers’ pay to student outcomes (performance-related pay);
- Fixing of pay levels and contract conditions locally at the level of the school;
- Replacing qualification, as the basis for employing teachers, with notions such as adaptability, performance, flexibility and compliance with objectives.
- Government set targets for school performance levels;
- Publication of school performances to encourage parent choice;
- Tying school funding to performances.



**Discussion: what can be the contradictions between performance and inclusive education? Can participants identify which specific groups could be penalized by the performance agenda in the classroom environment? What are the implications of Teacher pay related to performance in HIV affected countries? Ask participants to try and explore alternative methods and issues of accountability than the ones described above. (School inspectors, giving more space to hear the voice of learners on the teaching methods, opening school to community, Budget tracking...)**

PART 1

Schools  
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## Competition and Choice

*“The simple idea: parents interested in the schooling outcomes of their children, will seek productive schools.”* Quote from the recent WB policy paper entitled “quality education and economic growth”

The introduction into the state system of school choice – the right of parents to choose between schools – is the fundamental key to the covert transformation of the public education system into a market form or “quasi-market” as it is most often coined.

Choice is of course facilitated by moves to diversify local education provision. However, this “freedom of choice” has traditionally been a privilege of the wealthier urban elites who enjoy the option to send their children to expensive private schools. In some parts of South East Asia and Africa however, a very different kind of private primary school has developed. Charging modest fees and operating as small businesses with or without regulation or support from the government, new “low-cost schools” are specifically designed to cater for the poor. But once again, the idea of choice is misleading, as these schools usually spring in the voids created by government neglect, with little or no schooling alternatives to choose from for the poorer sections of the population. Although still representing a relatively isolated phenomenon, this new type of education provision is showing some serious signs of growth: In urban India, around 96% of the total increase in primary enrolment between 1993 and 2002 is estimated



to be due to growth in private schools unaided by government. In Pakistan's Punjab province, one in every three children enrolled in primary school studies in a private school. It is estimated that in parts of Lagos state, three-quarters of the children in school are enrolled in registered and unregistered private schools.

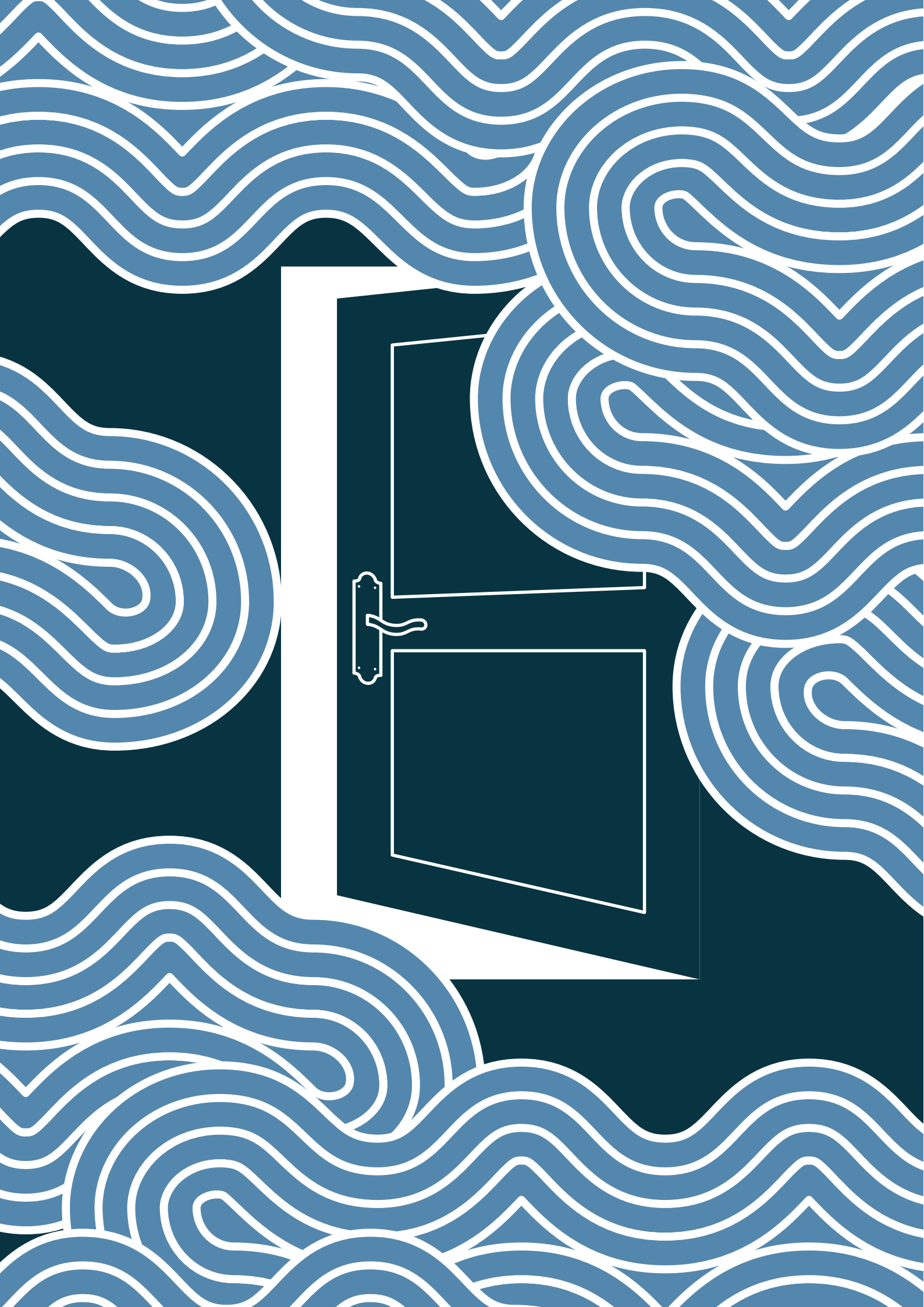
But more subtly, the choice imperative also means more competition between public schools themselves, via the new management procedures:

- the devolution of management responsibilities and budgets to schools;
- the provision of school 'vouchers' for use in public or private schools;
- increased flexibility in enrolment regulations
- the publication of 'performance outcomes' as a form of market 'information' for parent/clients

Most World Bank experts defend the idea that this competition is expected to have the effect of raising standards across the system; either through the closing down of 'poor' schools which fail to attract sufficient parental choices or by raising the performance of these 'poor' schools as a result of the competition for choices. "A rising tide that lifts all boats" is a favourite expression of privatization advocates of such as James Tooley. The latest GMR report totally invalidates this theory, stating for example that "Introducing choice and competition into an environment characterized by high levels of inequality without effective public action to equalize opportunity is a prescription for widening disparities." As witnessed in the WB report on Quality and economic growth, this hard evidence is not enough to invalidate the fundamental "free-market" concept which apparently overrides any other reality: « not many examples of operational, large-scale attempts at competition have been evaluated. Nonetheless, the benefits of competition are so well documented in other spheres of activity that **it is inconceivable** that more competition would not be beneficial. »



**Interaction: How can the following quote apply to the education sector? "In relations between the rich and the poor, between the master and the servant, its liberty that grinds down, and the law which liberates."**



# Workshop to underpin an advocacy campaign on quality education

## What to measure: developing a quality matrix

**OV**

**Overview:** Taking into account different perspectives, levels and variables

As we have seen, the definition of quality is almost as complex and wide-ranging as defining education itself. As a term covering such diverse but inter-dependant elements as infrastructure and people, teachers and learners, quantitative and qualitative aspects, economical and social factors, classroom environments to nationwide educational policies, inputs and outputs, it is not surprising that attempting to categorize the different quality themes isn't an easy task. The following exercise is a good warm up participatory way of demonstrating that even when it comes to agreeing on how to produce well known basic quality recipes, many parameters are involved and conflicting interpretations and variations can make it difficult to reach a consensus. The idea here, however, is that confronting these ideas and knowledge is also a very enriching experience...

**Interaction:**

**The Recipe exercise: identifying INPUT, PROCESS and OUTCOMES.** Take a very well known basic dish or local speciality which is widely eaten and made. Ask participants to form a circle; each person gives in turn one item that comes into the recipe of this dish, including ingredients, cooking utensils, infrastructure. This stage shall be described as listing the inputs.

Then we use the same technique to collectively describe the different steps involved to make the dish (preparation, mixing, cooking, etc...) Here we describe the process stage.

Participants then describe the necessary qualities this dish

should have once completed, to be considered of good quality. Elements here can include presentation (colour, shape, size) and of course gustative characteristics (consistence, taste, etc...). This is of course the Outcome/output level.

Even though it is possible that participants will highlight specific outcome qualities of the recipe according to the diversity and variations inherent to local or personal taste, it should nevertheless be possible to collectively agree on a final set of common indicators guaranteeing that the end product meets minimum quality requirements: the desired taste, colour and consistency, for example.

**OV**

### Overview: The three (or four) zonal levels

As the previous exercise will have hopefully highlighted, there are many different interpretations and variations concerning quality ingredients, each having its own advantages and/or serving to highlight a specific perspective/aim. One of the most widespread ways to categorize education quality factors is through a matrix grouping various elements according to the different stages experienced above INPUT, PROCESS and OUTCOMES. However, contrary to the recipe exercise (and to keep this very simple metaphor, always remember that we are NOT equating education with a product, but trying to categorize complex issues), with EFA we are not only cooking for the family and friends but for the whole nation. This is why the following matrix adds to the 3 stages listed above, three zonal levels to quality education (this is not a limitative list, other intermediary levels can exist such as provincial, municipal, etc...):

- The National level
- The school level
- The classroom level
- Matrix presentation (with just a few examples)



The Quality Matrix tool			
	INPUT	PROCESS	OUTCOMES
National level	• Teacher training facilities	• Civil society participation	• Values and critical thinking
School level	• Active inspection service	• Good school governance and accountability	• Literacy and numeracy
Classroom level	• Teaching /learning material	• Inclusive pedagogical practices: gender/ minorities/disabled	
INDICATORS	• Teachers' <ul style="list-style-type: none"> <li>- qualification</li> <li>- length of training</li> <li>- experience</li> <li>- number of inspectors</li> </ul>	• Level and quality of community participation	• Civic engagement of learners



**Interaction:** go round each participant asking them to add an item in each of the boxes. Check with the group to see if there is consensus on this.

## How to measure: Information, Data, Statistics, Indicators.

**OV**

### Overview: Tools and methods

All the different items described above can be monitored to evaluate if they meet the quality objectives or criteria set by government, donors, or CSOs. It can be particularly useful and relevant to advocacy and campaigning strategies to track quality information over a specific period of time, for example to assess how well a government is progressing towards his intended goals or how a CSO's quality campaign is impacting on education policies. Whereas Data, Information and statistics usually function to give an instantaneous/static view of an existing situation or environment, indicators are specifically useful as dynamic tools to measure progress (or the lack of it) towards a specific goal. Indicators can also be more complex and better tailored to monitor specific themes or overlapping issues (whether inputs, outputs or process) as they

frequently allow combining several sources of data/information into one analysis component. There have been many different approaches developed to monitor education progress using indicator frameworks. One rights based approach is the attempt developed by the Right to Education Project to establish a set of right to education indicators based on the 4 A framework, as developed by Katerina Tomaševki, the first UN Special Rapporteur on the right to education. (See Highlight: Education and the 4 As ; page 7, for more on the 4 As)

- **Information and Data**

These two terms are very often used indiscriminately, although information usually refers to anything that helps us grasp our environment (in this sense any stimulus can be called information: sounds, words, ideas, figures, pictures, etc...) whereas data is often more factual, objective and quantitative.



**Interaction: Facilitator and participants give a few examples. Ex:**  
**Information: My husband told me that this teacher was very good.**  
**Data: All teachers in this school are professional and qualified (i.e. passed a relevant diploma).**

- **Statistics**

Statistics is a mathematical science pertaining to the collection, analysis, interpretation or explanation, and presentation of data.



**Interaction: Facilitator and participants give a few examples. Ex :**  
**45% of the teachers employed at primary level are paid less than 2\$ a day.**

- **Indicators**

Indicators are used to provide new information, data, and/or statistics on a given subject. They also allow monitoring progress towards a certain goal (usually from a baseline situation) or policy objective and can therefore be very useful tools in detecting positive or negative trends. Indicators can rely on various techniques (questionnaire, survey, statistics, data, combination of the latter, etc) but invariably imply collecting, compiling and processing relatively large amounts of data.



**Interaction Facilitator and participants give a few examples. Ex:**  
**number or percentage of primary schools with adequate sanitation facilities for girls (from an agreed ratio of x toilets for x number of girls).**

**Disaggregated (information, data, indicators)**

Disaggregation is a very effective way of refining any type of data in order to reveal particular situations or inequalities linked to geography, wealth, gender, minority groups, etc. Disaggregated data is particularly useful for organizations wishing to go beyond the classical averages usually presented by governments and donors. These national non-disaggregated averages are sometimes deliberately misleading and often present a median picture which effectively covers up inequalities in quality education services.



**Interaction: Facilitator and participants give a few examples. Ex of disaggregated indicators. Percentage of children with access to pre-primary centres in rural areas. Average distance to school for children from lowest income households.**

## Identifying priority objectives for quality advocacy campaign

**OV**

### Overview: Urgency and efficiency

- **Develop a comprehensive country matrix**

As underlined through the previous Quality Matrix exercise, the quality issues linked to an integral vision of the EFA agenda are wide ranging and complex. Although some objectives benefit from more exposure and funding than others (typically the MDG related goals of UPE and gender equity), most developing countries are confronted with common and recurrent worldwide challenges on the road to meet the six Dakar goals by 2015. However, each country obviously also faces specific problems and varying levels of urgency related to their particular economic, political, social and cultural background. The first step is therefore to identify and categorize the relevant quality issues in your country. This can be done during the workshop process with participation from various members of your coalition, by developing a more extensive and elaborated country version of the quality matrix initiated above.

- **Importance, feasibility and impact**

Considering the wide range and variety of issues likely to arise, it is of course

quite essential that participants then set aside some time for discussions leading to a consensus on the highest priority subjects. This prioritization should not only consider issues in terms of their relative importance in the EFA agenda, but also in the way they can best be translated into advocacy objectives which the National Coalitions may pursue with strongest chances of maximum impact and influence. Whatever the quality obstacle identified collectively, advocacy objectives must be very clearly defined.

- **Multiple potential advocacy objectives per issue**

Identical content issues can very well lead to different type of advocacy objectives. For example, if the group has singled out teacher training as the top priority subject for quality education progress at national level, the advocacy objective can include

- Policy change. An end to government measures and regulations authorizing the recruitment of unqualified teachers.
- More resources: specific amounts earmarked for teacher training programmes in education plan's investment programs.
- Statistical targets: An agreed minimum benchmark percentage of qualified teachers in primary education.
- Awareness raising and mobilization: constructing, consolidating or extending a sustainable alliance with the teachers union to build bargaining power with government or donors.
- Advocacy aims can of course overlap and include a combination of the above, as long as they are designed for maximum efficiency in terms of impact and influence.

## Adapting to available Data, resources and skills

### OV

#### Overview: Information constraints and guidelines

Once you have identified your policy objective, your target audience and what you want to evaluate, there still remains an important reality check to be done. Indeed, campaigning on indicators can require skills, resources, networks and data that are not always available to CSOs. It is therefore always necessary to compromise between what is desired and what is actually possible in reality.

Even in countries which have regularly updated statistical data on education, governments and CSOs very rarely exploit them to their fullest advantage, through neglect or lack of resources. This is often linked to the way in which the raw data is presented and distributed. Statistics are generally published in annual reports which offer very tedious reading, because lacking any analytical perspective. What's more, this general data is often not precise enough for follow-up or evaluation purposes of specific educational issues.

The following series of questions should provide guidelines in helping adjust objectives and indicators to realistic and attainable goals while keeping these Data issues in mind.

- **Education Sector Plan targets**

Does the relevant education sector plan include specific targets with appropriate indicators to measure progress towards the identified goal?  
Are these indicators relevant to the priority issues listed for quality education needs or can they be adapted to be more relevant?

- **Availability of data to monitor objectives**

Is there existing data (government, international...) which can help monitor progress towards the chosen objective?



**Interaction: Collective inventory of sources of information.**  
Databases, Census, opinion Polls, Inspectors' reports, Household surveys, representative sampling or partial data...

- **Existence of disaggregated information**

Does the information report on geographic or socio-demographic diversities or disparities (gender, social class, rural, minorities, etc)?

- **Level of access to information**

Do we have access to the above? How easy or difficult is the access?

- **Capacity of CSO to process/adapt existing information**

– Is the information easily understandable and “ready to use” or does it need to be processed/adapted to conform to the intended objectives? (remember that an indicator is not an elementary item of information)

– If adapting/processing is needed, how difficult/easy is this, and do the actors have the necessary capacities/skills/resources to undertake this task?



**Interaction: Take prioritized issues and try to grade each one according to their degree of suitability to the above questions.**

## Developing your own Data

### OV

#### Overview: Building on grassroots access and knowledge

In many cases, accessing reliable and relevant education data and statistics will be one of the National Coalitions' most difficult tasks, either because the desired information corresponding to a specific advocacy objective indicator doesn't exist or that CSO's simply don't have easy access to it. It is quite possible however, for organisations to develop data that can be as strong and efficient for advocacy purposes than any "official" government or donor statistical report. In fact, one of the main advantages of CSO's benefiting from a large and diversified power base, is their knowledge of and access to grassroots level information and contacts, a serious advantage over many government and donor agencies in terms of monitoring quality education information on the ground, especially in "hard to reach" areas and communities.

#### • Sampling

If it is probably impossible for most CSO's to master the technical and financial resources necessary to conduct national level data gathering, the simple sample survey and questionnaire techniques can lead to very interesting and worthwhile results for education quality monitoring. Sampling basically means that your study, questionnaire, survey, and/or information will be limited to a specific section of society: age group, community, province, village, etc... According to sociological and scientific conventions, certain basic rules need to be respected for a sample to be representative of the national population. However, in the case of education, and specifically access to quality education for all, even very local and partial information can illustrate inequalities and barriers to EFA. Conducting a survey on a specific community, asking for people's direct experiences on education quality issues (are your children in school? Why not? How far is the nearest school? Have you ever been to a literacy program? Is the school safe? Have you met the teachers, are they qualified? Etc...) can be a very effective way of developing accurate and significant data which, although restricted in size, can feed findings and have implications which can apply to the whole nation.

**Country example:****The Educational Experience Survey in Solomon Islands**

The Educational Experience Survey was developed by the Coalition on Education Solomon Islands (COESI) in partnership with the Asian South Pacific Bureau of Adult Education (ASPBAE). It was designed to collect information about educational, language, and literacy experience at the village and individual levels in selected communities. The survey was conducted using a sampling method in two provinces, with 2 200 people between the ages of 15 and 60 interviewed, after the organisation of several Surveyors' training workshops. The results showed, among things, that the official literacy rate figures cited in government publications were grossly misleading and could no longer be used as a basis for policy making. The survey results and dissemination produced a very big impact on the education authorities, forcing them to engage in a large scale re-evaluation of the literacy levels on the Solomon Islands.

**• Direct community involvement**

The other added value of surveys using sampling techniques is that they can usually be led by the CSO's own members with direct community involvement. This not only means that National Coalitions can largely rely on their own resources for data gathering, but also, through this participatory research and discussion process, put more pressure for the quality objectives and indicators to be clear and understandable by the ultimate beneficiaries: the people and communities themselves. It is in fact, very important to always consider, right from the data collection and processing stage (and indeed up to the campaigning and dissemination of results phases) what internal and external partnerships can be developed at grassroots levels. All experiences show that the earlier the involvement, the stronger the campaigning phase will be.

**• Data collection Tools and methods:**

**Surveys:** One of the easiest and effective ways to collect statistical information. Asking many people the same questions will give you data that is easy to compare and draw observations from. The questions need to be straightforward, offering a limited possibilities of responses, and as neutral as possible in their formulation, so as to avoid as much as possible influencing the respondent. The series of questions is often called a questionnaire, which can also be sent in written form.

**Semi-structured interviews:** this is conducted through fairly open



questions which allow for focused, conversational, two-way communication. Unlike the questionnaire framework, where detailed questions are formulated ahead of time, semi structured interviewing starts with more general questions or topics. The majority of questions are created during the interview, allowing both the interviewer and the person being interviewed the flexibility to probe for details or discuss issues.

**Focus group discussions:** gathering a group of people to discuss particular issues offers a different and sometimes richer perspective than one on one interviews or surveys. The interaction enables individual ideas, facts and conclusions to be confronted, debated and corrected by collective knowledge. This method requires skilful group facilitation to give everyone a chance to express themselves and restrain particularly dominant voices.

**Mappings:** maps are useful to present the school in the community context. Types of questions which can be developed using maps include: locating where people live and distances to the school. Where do the out of school children come from? How many school age children in the area? Identify transport links.

**Observation:** this is particularly useful for monitoring qualitative, process aspects of education. It involves direct access to situations and environments, giving you a concrete feel and personal perspective of your area of interest. This type of information remains highly subjective however, and needs to be confronted with hard data and/or other experiences, to be used in a reliable way.

#### • Adapting method to information source

Data collection methods will of course vary according to your field of interest and privileged target information sources. Below are just some possible options

- At input level, infrastructure, resources, educational material: collecting data from school records, interviews with head teacher, teachers, children and parents; on site observation.
- At process level, teaching, curriculum: questionnaires, reviewing textbooks and exercise books, on site observation of classroom teaching.
- On questions of access, transport, costs...: collecting data from school records, door to door survey, PRA Tool, mapping, semi-structured interviews...

- On questions of management and community participation: on site observation, questionnaires, semi-structured interviews with key players (head teacher, teacher's union representative, student's association representative, CBO members, community leaders), collecting data (minutes, membership, attendance) of SMCs, School record data...

### **ANCEFA's Africa Regional Education Watch Reports**

Surveys were conducted in a sample of twelve African countries, each producing a country report, compiled into a regional report to highlight the major trends on the status of EFA implementation in sub Saharan Africa. A questionnaire was sent to National Education Coalitions in the twelve pilot countries (Burkina Faso, Burundi, Cameroon, Ghana, Kenya, Niger, Nigeria, Tanzania, The Gambia, Togo, Uganda and Zambia,) for the pilot phase of the Education Watch. The validated research reports from these countries were a product of analysis of research data derived from the filled-in questionnaires and the school learning assessment reports.

**Methodology:** All the participating countries in the study used the same methodologies. These included the review of existing documents: education statistical abstracts, mid-term review and sector review (including Public Expenditure Reviews - PER) reports, progress reports, annual budget reports and the legislation on education. Many countries used Management Information Systems (MIS), Monitoring Learning Achievements (MLA), The Francophone Learning Assessment Programme (PASEC) and The Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ) data. Semi-structured interviews and focus group discussions were held in all countries. The stakeholders interviewed included, head teachers, teachers, students, government officers and CSOs amongst others. Field visits to selected schools were also conducted.

**Sampling:** A multi stage sampling technique was used. The schools were randomly selected based on the decentralized structure of each region, province, division or district. The stratification also took into account the rural – urban differences as well as equity issues including poverty considerations. The number of schools sampled differed from country to country due to the size of the country and the level of decentralization. For example Nigeria had to approach the study at the state level due to its size and the networks that exist at state level.

**Research Questions:** The purpose of the Ed Watch questionnaires sent out to the National Coalitions was to be administered through desk and field research in a bid to tease out the main issues on:

- The Primary Education Access-at different levels
- The Quality and Relevance of the education being provided
- Financing Education (by government and donors),
- Gender Parity, pupil teacher ratio, etc.

The respective country studies sought to answer a set of questions focusing on two key aspects of the education delivery system: **policy and practice**. The aim was to examine the extent to which education policies, especially in relation to the Dakar Declaration are achieved, and the challenges faced in attaining them. Specifically, the questionnaires focused on the following areas of the national education systems:

- Ratification of International Instruments and Legislation on Education
- Existence of an EFA Plan
- Aid Modalities and Development Frameworks
- Assessing Education Quality
- Learning outcomes/achievement for Rural and Suburban areas
- Gender and Girls Retention in Schools
- Education Financing
- Public Expenditure Tracking mechanisms
- School Governance
- Challenges

Based on the questionnaire provided, the country team engaged education authorities at central and regional levels and the school administrators, to gather information through de-briefing meetings, interviews and focused group discussions, field visits as well as case studies. Desk research for secondary data and literature review was also conducted.

**For advice on methodology and content in organising quality workshops, please contact the Global Campaign for Education Secretariat at [info@campaignforeducation.org](mailto:info@campaignforeducation.org)**

## From objectives to indicators

### OV

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#### Overview: a question of choice and potential.

As shown by the various factors affecting policy and campaigning objectives, quality indicators most suited to serve an efficient advocacy campaign must be chosen very carefully. Aside from the different types of advocacy objectives, indicators can be adapted to each specific stage we have previously exposed in the education matrix: input, process and outcome. Although, outcome indicators – those used to measure children’s performances at exams – are the most widely used, a wide variety of indicators can become efficient tools to monitor quality progress in the EFA arena. The example given below is just an illustration of the rich and complex process and the multiple roads one can take on the journey from objectives to indicators. It was developed during one of

## Example: Teacher training

the quality workshops GCE organized in collaboration with ZANEC (Zambia National Education Network) in Lusaka, where participants identified the issue of Teacher training as one of the advocacy campaign objectives.

### Existing status

- Existing minimum requirements for recruitment
- Existing minimum initial formation period
- Existing minimum number of hours for in-service training
- Legal status of teaching profession and in particular freedom of organization and trade union activity

### Existing objectives

- Listed in education plan
- Advocated by Teachers' Union or CSOs

### Actions necessary to define new quality objectives

- Identification of the teachers' training needs
- Definition of minimum standards for teacher training

### Useful basic INPUT information and data

- Number of teachers
- Geographical distribution
- Qualification of teachers (disaggregated data?)
- Number of places in specific teacher training centres
- Information on teacher training programmes
  - Number of teachers benefiting
  - Average number of hours
  - Material, distance learning, manuals
- Resources invested in training
- Number of inspectors (disaggregated data?)
- Data on training and qualification of inspectors

### Process data

- Opinion polls on quality of teaching

- Availability of child centred/child friendly pedagogical material
- Existence of dialogue mechanisms with other teachers, with parents and students.
- Level of teacher adaptability to vernacular or minority languages
- Support and interfaces with higher education/ university/academic structures, in particular in the field of educational sciences, linguistics, pedagogy...
- Teacher Bonus system, incentives or salary increases linked to difficult environment, training or pedagogical evaluation
- Housing allocations

### Where to find this data.

- Government sources: Ministries (Education, Finances, Labour...)
- IFIs: World Bank (Poverty Reduction Strategy Papers, ..); IMF (PRGF, ...)
- UN/Multilateral reports: UNESCO, UNDP, OCDE...
- INGOs, national CSOs: Country case studies.

### Where data is not available, can it be generated?

- Research time, resources and capacity
- Organize independent survey with representative sample of teachers/schools.

### Partnerships

- For research, data collection and processing, (and subsequent campaigning phase which will be enhanced by alliances strengthened by closer cooperation at the initial stages) what internal and external partnerships can be developed?
- Civil servants
  - Individual members of National coalition organizations
  - Teachers Unions as members of Coalition or as partners in campaign
  - Other important educational staff: Head-teachers, Inspectors...

- Community (Parents, CSOs, ...)
- Individual parents and Parents' associations (members of coalition or not)
- Individual members of National coalition organizations

#### Input indicators adapted to the above

- Percentage of teachers with agreed minimum qualification requirements
- Percentage of qualified teachers in rural areas
- Percentage of teachers receiving agreed minimum number of hours for in-service training.
- Inspectors per teacher
- Average distance or % of teachers less than x km from a in service training centre
- % of networked schools
- % of teachers with ICT training
- % of qualified head teachers
- Average rural teacher's salary or ratio of rural to non-rural teachers' salary
- % of single teacher schools
- Average number of teaching service for head teacher/principal

#### Process Indicators

- Participation rate of Parents
- Non violence in class (no corporal punishment)
- Percentage of teachers with second job
- Percentage of teachers using multi-lingual approach.
- Teacher turnover (average N° of years in school or % with less than x years of service)/ absences
- Percentage of teachers using an active/ participatory teaching method
- If new programme launched, % of teachers using it
- % of teachers participating in a teacher network
- % of teachers who know at least half the pupil's parents
- % of teachers who live in the community
- % of teachers not inspected for x years / Number

of inspections per school per year

- % of teachers trained in multigrade instruction
- Number of seminars, refresher courses, pedagogical support days per year per school per teacher

#### Outcome Indicators:

- Disaggregated analysis indicator of exam results (correlations between teacher quality and exam success: there have been evidenced causal relations between using Female teachers and learning achievements, for ex)
- Auto-evaluations of teachers by students.
- Non-racist opinions (the question asked to students was : are you happy that foreigners live in your country or would you prefer that they be sent back home. This was actually a suggested indicator given by the 2000 special rapporteur of the UN human rights commission)
- Retention rate
- Pupil's attendance rates
- Participation in extracurricular activities

#### Task force

- Project leader: legitimacy with coalition members, analytical skills, experience in statistics.
- Monitoring or steering committee representative of member structures + partner stakeholders
- Working group
- Short term deadlines: maximum one year from start to publication of intermediary results

#### Possible needs

Capacity building for data analysis, processing and use in advocacy campaigns.



**Interaction: From objectives to indicators. Work through one example as prioritised by national coalition**



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