

Sida Support to the International Institute for Education Planning, IIEP

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and Social Development**

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ABBREVIATIONS

ANTRIEP	Asian Network of Training and Research Institutions in Educational Planning
ATP	Annual Training Programme
CESO	Centre for the Study of Education in Developing Countries
DAE	Association for the Development of African Education - formerly Donors to African Education
DDA	Development Cooperation Agency (Switzerland)
DSE	German Foundation for International Development
ERIC	Educational Resources Information Centre
ESAP	Economic Structural Adjustment Programme
GNP	Gross national product
HEDIB	International Bibliographic Database on Higher Education
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immuno-Deficiency Syndrome
HRD	Human Resource Development
IIE	International Institute for Education (University of Stockholm)
IIEP	International Institute for Educational Planning
ImaTeP	Institute of Madagascar for Techniques of Planning
INNOTECH	Regional Centre for Educational Innovation and Technology (South East Asia)
ITC	Intensive training course
IWGE	International Working Group for Education
KEDI	Korean Educational Development Institute
MA	Master of Arts
MANTEP	Management Institute for Training of Education Personnel
MEC	Ministry of Education and Culture (Zimbabwe)
MHE	Ministry of Higher Education
MoEC	Ministry of Education and Culture (Tanzania)
NASEDEC	Nordic Association for Education in Developing Countries
NCERT	National Council for Educational Research and Training
NIEPA	National Institute for Educational Planning and Administration (India)
NORAD	Norwegian Development Cooperation Agency
ODA	Overseas Development Administration (UK)
OECD	Organisation for Economic Cooperation and Development
PROAP	UNESCO Principal Regional Office for Asia and the Pacific
SACMEQ	Southern African Consortium for Monitoring Educational Quality
SADC	Southern African Development Conference
SERI	Southern Education Research Initiative
Sida	Swedish International Cooperation Development Agency
SIDA	Swedish International Development Authority
UK	United Kingdom (of Great Britain and Northern Ireland)
UN	United Nations
UNDP	UN Development Programme
UNESCO	UN Educational, Scientific and Cultural Organisation
UNICEF	UN Children's Fund
USA	United States of America
VT	Visiting Trainee

EXECUTIVE SUMMARY

1 Tasks of the evaluation

This evaluation report examines the support given by the Swedish International Development Cooperation Agency, Sida, to the International Institute for Educational Planning (IIEP), an institute established within the framework of UNESCO and located in Paris. Over the past thirty years Sweden has contributed more in direct voluntary financial contributions to IIEP than has any other country, even though there have been periods during that span of time when other countries have been the leading contributor. There have been eight agreements between Sida and IIEP during the period from 1969 to 1996. The support has amounted to a cash total of about US\$11m.: considerably more at 1996 prices.

Sida and IIEP agreed that in 1996 there should be an external evaluation of Sida support to IIEP, to take place prior to the negotiation of any agreement to follow on from the eighth agreement. This was due to expire in June 1996, but an extension period was later provided to December 1996, taking account of the change of Sweden's financial year to a calendar year basis.

The evaluation was to take as its starting points

- (a) the overall development objective of the programme supported by Sida which was 'to promote effective educational planning in developing countries by strengthening their national capacities for planning and managing sustained development of their educational systems': and
- (b) IIEP's four-fold strategy of activities for achievement of the above, namely (i) the nine-month Annual Training Programme (ATP); (ii) specialised intensive training courses (ITCs) and seminars; (iii) applied research and studies; and (iv) institutional development including training of trainers.

The evaluation was to focus on the above activities and concentrate on the period of the last three agreements from January 1990 to June 1996. The activities were to be evaluated in terms of their relevance to the achievement of the objective of the agreement; the extent to which objectives established for the sub-components of the programme had been achieved; the efficiency including cost aspects with which sub-components had been carried out; the impact of the training activities in Sida programme countries. In addition to the impact of support at country level the consultants were also to consider the overall impact of IIEP internationally and in particular on Sida's Education Division.

As part of the impact evaluation there would be a tracer study of former IIEP trainees who graduated between 1990 and 1995. The consultants were to conduct a limited number of national case studies on the overall impact of the different IIEP activities.

2 The consultancy

Following a tender procedure, two independent consultants were invited to undertake the task, and eight weeks of their time was contracted in each case. These were Peter Williams (team leader) and Kees Maxey, both from Britain. They started work at the end of May and submitted their final report in October. During that time, for purposes of data collection they visited Paris and Stockholm for interviews and collection of documentary material at IIEP and

Sida; conducted three country-case studies in India, Tanzania (both Mainland and Zanzibar), and Zimbabwe; visited certain European countries for consultation and discussion with cooperation agencies and specialist institutions; and engaged in further consultation by interview and correspondence with knowledgeable specialists. Thereafter an extended period of consideration and analysis of the evidence collected, and drafting the report, ensued.

Following the initial section (Part A) dealing with background and approach, the report has three main parts. Part B is contextual, with description and analysis of IIEP and its work and of Sida's support for IIEP. Part C, the assessment, covers performance under the agreements, the principal areas of activity in IIEP programmes, and IIEP's impact both as a dialogue partner with Sida and internationally. Finally come the overall conclusions (Part D).

3 IIEP and its work

IIEP is an institute established in 1963 within the framework of UNESCO but with its own Governing Board and separate budget. Its purpose is to promote instruction and research on educational planning in relation to economic and social development, with a special focus on the neediest countries. It does this primarily through training, research and publications. It also serves as a resource centre of information and documentation for those working in its fields of specialisation, and performs certain technical assistance and consultancy services. It hosts the secretariat of the Association for the Development of African Education and it provides the secretariat for the International Working Group on Education (a grouping of international assistance donors)

Major activities of IIEP include its nine-month Annual Training Programme which accepts around 35 trainees per year; they are joined by others enrolling on some of the optional specialised modules. Some 10 to 15 intensive training courses are held annually, enrolling 300-400 trainees, and an average of about ten shorter research seminars, workshops and policy forums. In recent years about 20 to 30 studies have been undertaken/commissioned at any one time and these have been the basis for around thirty IIEP publications a year. The Institute has or is about to sign partnership agreements with 15 overseas institutions and has designated 180 libraries in developing countries as depository libraries for the receipt of IIEP publications without charge.

IIEP has an international staff in 1996 of 55 persons, of whom 17 are professional staff working in training and research programmes. Its budget amounts to about US\$5.9 m. per annum in cash terms and US\$9.1 m. total resources including the value of premises provided by France. Voluntary contributions have accounted for about a fifth to a quarter of the total cash income in recent years: UNESCO has been providing half the cash budget.

This evaluation is particularly concerned with Sida support under the sixth agreement covering the period from January 1990 to December 1992, the seventh agreement from January 1993 to June 1994, and eighth agreement from July 1994 to June 1996. In this period Sida provided IIEP with 29.5m. Swedish kronor, or US\$4.4m.. Half this assistance has gone into the ATP, and other substantial proportions for the intensive training courses, and research and studies. Dissemination activities (especially the Fundamentals of Educational Planning series) and institutional development have also attracted Swedish support. The agreements between Sida and IIEP have contained appendices specifying IIEP's objectives for the period ahead and the

uses of Sida money. Informal review meetings are held every year when representatives of the two parties examine the progress that has been made and exchange views on education co-operation developments more generally.

4 Performance under recent agreements

The report concentrates on the second half of the period, 1993-1996, as being more recent. The objectives of the seventh agreement were broadly met. In a few cases activities fell behind schedule, and progress with the partnership agreements seems to have been disappointing. A similar pattern seems to have obtained during the eighth agreement period during which constraints with operating the partnership agreements have been encountered, leading IIEP to review the efficacy of this particular model. In general, however, the objectives laid down in the agreement were met.

5 Annual Training Programme (ATP)

About half of Sida support is directed to the ATP. The evidence from the end-of-course evaluations and the tracer study conducted in 1996, and also from the country case studies undertaken by the consultants, is that there is a great measure of satisfaction with the ATP on the part of the participants. This relates both to course content and teaching method, where the practical nature of the course and its grounding in developing country realities are much appreciated. Against a background of strong overall satisfaction, the criticisms encountered included ones about accommodation in Paris, most often where trainees had been housed apart from their fellow students, shortage of time to explore subject matter thoroughly, gaps in the country holdings of the IIEP Documentation Centre, and a feeling on the part of some trainees that they 'deserved' a more prestigious qualification than a certificate of attendance on successful completion of the course. (There are arguments for and against changing the certification arrangements and the consultants state their belief on balance that the present position should remain).

The great majority of trainees appear to have stayed in educational planning or related work after their training: 77% were still with the same employer as they had been working for at course completion. By contrast only 24% were in the same job as at the end of the training. Whereas 97% seemed confident that their professional competence had been increased by course attendance, only 58% considered the course to have brought them career progress.

The evaluation records this high degree of customer satisfaction, reflected in the continuing strength of demand for places on the programme, and notes its strong points. The consultants observe that IIEP is trying to cater for a very heterogeneous group of trainees and that in their home countries there is increasing specialisation and diversification of planning roles. The Institute has to some extent taken account of this by adjusting the structure of the ATP to allow greater specialisation, and the evaluators ask whether this process may not have to be taken further in the coming years. Future developments could include the offer in Paris of more specialised advanced options, which might (but would not necessarily) be associated with transfer of some or all of the basic core elements in the present ATP to developing country locations.

The cost of the course is high - a total of US\$49,000 for tuition and living costs and associated expenditures in Paris. This does reflect a number of special elements like

interpretation and translation and provision of personal computers, and should not be assumed to involve a wasteful level of expenditure.

6 Intensive training courses and seminars

This area of activity has expanded a great deal in recent years. The courses are specialised and nearly all of them held in developing countries. They have generally been highly praised by participants who have appreciated their practical nature and the chance to exchange experiences with those from neighbouring countries. Some participants wished there could have been more follow-up. The number and proportion of women participants is not wholly satisfactory: it is subject to IIEP influence, but not control. The average cost per trainee on these courses is inflated by expenditures at IIEP and on consultants.

7 Research and studies

IIEP research and studies focus on applied studies and practical issues. The programme is closely linked with training, and is itself a vehicle for professional development of research workers from developing countries. In the case-study countries there were examples of IIEP research programmes, in two countries funded in part by the Sida grant, impacting on policy and local institution-building. These included research into the Tanzania Literacy Programme, and work in Zimbabwe on monitoring the primary school system in order to use the information generated to bring about school improvement. Research in India and Zimbabwe has paved the way for the creation of two regional networks. The research programme is geared to topics high on international agendas at the present time but involves a wide spread and the consultants ask whether there might not be advantage to be drawn in greater concentration, to obtain more critical mass and potential for closer quality control. Consideration could advantageously be given to developing new vehicles for disseminating the results of research to make them more accessible and useful for policy-makers and practitioners.

8 Institutional development and training of trainers

This is an area to which Sida has attached particular importance, given its concern with the building of national capacity. A centrepiece of IIEP's programme in this area has been the partnership agreements signed with some 15 institutions. Experience has been mixed and some of these partnerships have flourished while others have been a 'dead letter'. Meanwhile there are many examples of vigorous collaboration with institutions where there is no formal agreement. It has not been possible to operationalise the partnership agreements in any systematic way and the Institute is now looking more to the 'network' as a more promising model than the partnership arrangement. The Asian Network of Training and Research Institutes in Educational Planning (ANTRIEP) is seen as a prototype, as yet not fully tested, with the Southern African Consortium for Monitoring Educational Quality (SACMEQ) offering a different institutional embodiment of the same broad idea.

Although there does seem to be a higher proportion of training institution staff on the ATP than ten years ago, it is still well under a fifth. However it is difficult to pursue purposeful policies on this because it is governments that make nominations to the ATP and which tend to control the award of fellowships. IIEP has not developed much by way of training provision in staff development for faculty members of institutions training in educational planning and management. The consultants suggest that in the next phase of development

attention should be directed to consideration of how IIEP's range of services and publications could be developed to extend more support by way of practical services, materials and guidance to the many professionals and institutions engaged in teaching educational planning and management which presently feel out of touch with IIEP.

9 Publications and dissemination

The publications programme was generally well spoken of and appreciated by those surveyed through the tracer study and country case studies. The Newsletter in its new format was widely praised, and the circulation to a constantly updated address list is impressive. Dissemination of the Newsletter and publications is certainly given impetus by the policy of free distribution on request, to developing countries. The depository library programme, which designates certain key libraries in developing countries to receive sets of IIEP publications, seems to work well in some countries. In Tanzania, however, which was one of the case-study countries, the experience was unsatisfactory: in some instances the materials were mislaid in transit, and in others the lack of trained librarians prevented the materials that had been received from being put to effective use. There was also a need for the supply of materials to be accompanied by a user-awareness programme.

10 Impact internationally and on Sida

IIEP is well regarded internationally. It enjoys the trust of developing countries and has exerted considerable influence on the establishment of educational planning as a respected profession which individuals are eager to join and an activity which governments and aid donors are keen to support. The relationship with Sida has been mutually beneficial. Sida has obtained good value from its support for IIEP in terms of access to IIEP's professional resources, expertise and contacts; the opportunity for helping to shape IIEP and UNESCO policies; and advancing the central concern of its external policy to strengthen the UN. In future Sida may wish to impart even more focus to its choice of programmes for support: two areas of particular concern are institutional development and gender in education. On the latter the study finds that IIEP has made notable strides in increasing the number and proportion of females on the staff, but is only now beginning to accord gender the importance it deserves in the substance of its training and research programmes.

11 Conclusions

In relation to the specific questions put in the terms of reference the study reaches the following conclusions.

Relevance. The training and research activities of IIEP are both relevant in the sense of being rooted in developing country realities, and having a practical orientation. Closer investigation is needed concerning the 'fit' of trainees' background and experience, and the changing requirements for educational planners as the profession becomes more diversified and specialised, in relation to the content and structure of the ATP. The programme of institutional development and training of trainers is the most closely geared to the overall objective of national capacity- building. In this area it has become clear that the partnership agreement model is too restrictive in relation to needs. Both it, and the depository library scheme which has also not worked in a completely satisfactory manner, are based on the principle of designated partners, and the consultants suggest that the challenge is to operate in a more facilitative mode and with more open-ended programmes of institutional support, to

complement existing programmes. Examples would include production of reading lists, publishing more training materials for adaptation by local institutions, and independent study modules for staff development.

Extent of achievement of objectives. The shorter term objectives of recent agreements have been broadly met, but there have been some gaps between intention and realisation in the area of institutional development.

Efficiency. From a managerial point of view IIEP's programmes appeared to be well run and smoothly executed. Financial control and expenditure analysis were found to be competently handled. Unit costs for many IIEP activities are inevitably high given IIEP's location and international mission and the multiplicity of its functions. When individual projects and programmes are costed out as projects for funding, they inevitably carry a high staff and overhead element. This problem is faced by many international and other institutions, and is by no means unique to IIEP.

Impact. IIEP has had considerable impact on the conception and practice of educational planning, particularly in developing countries, and has helped to create an influential core of practising educational planners and teachers of educational planning. The skills and capacities of trainees have been considerably enhanced through training and participation in research projects. In assessing the impact of IIEP training on the practice of educational planning one has to accept that very many factors of a social, political and economic kind have constrained the possibilities of improving education systems in a purposeful way. There is clearly a challenge to gear IIEP's training, research and dissemination as closely as possible to implementation. A number of examples are cited of IIEP research and studies having an effect on practice and impact might be further enhanced if research findings could be packaged in more popular and accessible form. The institutional development and training of trainers programmes are being re-examined by IIEP: a more proactive approach to staff development is one important area for attention.

The study concludes that all institutions, even successful ones like IIEP, need to change and adapt. This report on Sida support for IIEP identifies many opportunities and challenges for the Institute if it is to remain fully relevant and competent to fulfill its mission in the decades ahead. A particular challenge for IIEP is that any repositioning of itself to respond appropriately has to be planned and executed at a time when many senior staff of IIEP are due to retire. Over this crucial period external support for IIEP will be even more necessary, but could have higher pay-off, than ever before. In a world where so much institutional infrastructure is in ruins this 'irreplaceable international resource', as it was described to the consultants, needs to be nurtured and supported as it positions itself to serve the international community in the 21st century.

FOREWORD

This evaluation report was compiled between late May and early October 1996. The contract provided that we should each devote eight weeks to the assignment, but the total duration of the exercise was necessarily more protracted than this, partly because of our own pre-commitments at the time of engagement in May. An additional factor was the three or four months required for conduct of the tracer study of former trainees (preparation of survey instruments, securing returns, analysis and evaluation of replies, preparing a report). Much of the allocated time had to be used for travel and interviews abroad in Stockholm and Paris, in the case-study countries and with some of Sida's partner agencies in Europe. A further week was devoted to preparation of survey instruments and contacting informants by mail and phone. Information analysis and report-writing and revision consumed the remainder of the time.

We have tried to cover the broad canvas required by our terms of reference, but in many instances could not go as deep as we would have wished. We had the benefit of interviews with members of IIEP's professional staff, but unfortunately for us the evaluation coincided exactly with the period when no trainees were in Paris. Thus we had no first-hand encounters with Annual Training Programme (ATP) trainees *in situ* and our direct contact with developing-country clients of IIEP's programmes had to focus almost entirely on those we met in the three case-study countries, namely India, Tanzania and Zimbabwe.

Honesty therefore requires that we qualify our judgments at many points by reference to the limitations either of the evidence available to us or of our ability to probe as deeply as might have been desirable in the time at our disposal. Readers should understand these limitations, and also that we as authors are fully aware of them.

We gladly acknowledge our debt to all who have contributed to this evaluation, particularly the Director, Jacques Hallak, and staff of IIEP; and members of Sida's Education Division. The staff of IIEP have been unfailingly generous with their time, both in briefing us on their work and commenting on draft material. Amongst them we single out Lars Mählck who, with colleagues and staff in his office, has borne the brunt of the work to assist us. He has been patient, ever-courteous, and extremely helpful in locating and compiling the information we sought. Among the many others who have helped, Ioannis Antoniadis and John Hall and their respective staffs bore a large part of the burden. Our sincere thanks go to all the above, as well as to the many others outside IIEP whom we interviewed or who responded to our enquiries. While recognising how greatly we have been helped by others, we take entire responsibility for the report, and any shortcomings it exhibits.

Peter Williams

Kees Maxey

PART A BACKGROUND AND APPROACH

CHAPTER 1 INTRODUCTION

1.1 Terms of Reference

Sida, the Swedish International Development Cooperation Agency has, for many years, made a major voluntary contribution annually to the programme of the International Institute for Educational Planning in Paris. This has been a response to resolutions passed by the General Conference of UNESCO inviting the support of member states for IIEP's activities. The contributions have been based upon a series of agreements, lasting for between eighteen months and five years. Detailed reporting by the Institute, and discussions with Sida in Stockholm and Paris, preceded each new agreement.

In 1995, it was agreed by Sida and the Institute that 'an external evaluation should be carried out towards the end of the current agreement period' of Sida support to IIEP. The evaluation should concentrate on the period covered by the last three agreements - January 1990 to June 1996 - but take into account the earlier period when relevant. The full text of the Terms of Reference is reproduced in Appendix 1. What follows here is a summary.

The overall development objective of the programme supported by Sida, as set out in the current Sida/IIEP agreement, is:

To promote effective educational planning in developing countries by strengthening their national capacities for planning and managing sustained development of their educational systems.

The Institute has three main tasks:

- * to train education planners and administrators, mainly from developing countries;
- * to carry out research related to the central questions of educational planning; and
- * to disseminate new educational planning concepts, techniques and methods to all interested individuals and institutions.

It has a four-fold strategy of closely related activities for carrying out these tasks and achieving the main objective:

- * the annual training programme (of nine months);
- * specialised intensive training courses, seminars and workshops;
- * applied research and studies; and
- * institutional development, including the training of trainers.

These activities were to be assessed by the consultants in terms of:

- * the relevance of the various activities to the achievement of the objective of the agreement;
- * the extent to which the objectives established for the different sub-components of the programme have been achieved;

- * the efficiency, including the cost aspects, with which the sub-components have been carried out; and
- * the impact of the training activities in Sida's programme countries, as regards educational planning and management, for example in terms of the usefulness of the training received by national specialists for performing their tasks, improvements in their capacity to plan, draw up documents and reports and facilitate the implementation of policy.

The team was also asked to make some comments on the overall impact of IIEP internationally and in particular on Sida's Education Division. Further, the above elements were to be addressed holistically to its activities in general as well as to each activity individually.

The team was to work closely with both IIEP and with Sida and use existing documentation and any available evaluations. A tracer study of former students on the Institute's Annual Training Programme who graduated from 1990 to 1995 was to be undertaken jointly between IIEP and Sida's consultants. Three countries receiving Sida's educational support would be selected as case studies. The team was asked, whenever appropriate, to use gender disaggregated data and to integrate gender aspects into the discussion and conclusions.

A total of eight weeks by each team member (16 person weeks in all) were allowed for completion of the task which was to be undertaken between the beginning of June to the middle of October 1996.

1.2 The Consultants

The two-member team consisted of:

Mr. Peter Williams (Team leader), former Director of the Human Resource Development Division of the Commonwealth Secretariat and, before that, Professor and Head of Department of Education in Developing Countries of the Institute of Education, University of London.

Mr. Kees Maxey, former Director of the Africa Educational Trust, London.

Peter Williams had a long-term but essentially independent relationship with IIEP for whom he has been an author in the 'Fundamentals in Educational Planning' series and an honorary Consultant Fellow, but Kees Maxey had no previous connection.

1.3 Methods of Working

The consultancy took place in a number of stages.

1.3.1 Initial Briefings

Briefings of both members of the team took place at the beginning of June in Paris (2 days) and Stockholm (3 days). Some of the relevant documentation was obtained at this stage and the details of the working methods specified in the Terms of Reference were discussed and agreed. Mr. Lars Mählck was appointed by IIEP to facilitate the work of the consultants. Ms. Christine McNab was nominated by Sida to assist in the same way.

1.3.2 Collection of Evidence

The consultants made separate visits to the Institute in Paris of roughly one week each in late June/early July and, between them, conducted individual interviews with all of the professional staff. In addition the Chairman of IIEP's Governing Board, Dr. Lennart Wohlgemuth, and also various members of UNESCO staff were interviewed. Some of the above were seen by both consultants.

The Sida archives were searched for relevant material as far back as about 1985. The Institute provided the team with all the documentation it required. In particular, the team was given a full set of printed annual reports covering the period (1990-95), and a set of the Director's reports to the Governing Board of IIEP. The latter included fairly detailed financial reports. In addition, full sets of the IIEP Newsletter and of Tabas (the ATP students' annual journal) from 1990, and any other research reports or publications which the consultants requested or which IIEP staff considered relevant, were supplied.

To assist the consultants in consideration of the overall impact of IIEP internationally, about 50 experienced professionals based, in universities, training institutions and co-operation agencies in industrialised and developing countries, were asked for their views. Replies were received from rather over half of those approached.

Development assistance agencies and specialist organisations in Brussels (the European Union), Bonn, Copenhagen, Oslo and the Hague were visited in August (by PW) with the particular purpose of discussing the modalities of their co-operation with IIEP and their perception of the general impact of IIEP's activities in educational planning internationally.

1.3.3 Survey of trainees from the Annual Training Programme and other courses

The methodology of the tracer study of Annual Training Programme (ATP) students who completed from 1990 to 1995 (i.e. six groups), including the questionnaire to be sent to them, was agreed early in the consultancy. It was also agreed that, for the three selected case study countries, there would be a parallel study of those who had attended Intensive Training Courses (ITCs), who had been to Paris as Visiting Trainees, Visiting Fellows or Research Fellows, or who had been involved in any IIEP research projects. A questionnaire for this group was also agreed. Both sets of forms were dispatched by the Institute with a supporting letter from the Director, Jacques Hallak, in June and July. The administration and data processing of the survey of the former ATP students was handled by IIEP.

1.3.4 Country Case Studies

From among the 12 developing countries in Africa and Asia where Sida had education programmes, it was decided to select three for more detailed case studies - India (KM), Tanzania (PW) and Zimbabwe (KM). These countries were chosen because:

- * they represented a range of countries in terms of geography, size and period of time with independent status (1948, 1961 and 1980);
- * they had all interacted with IIEP for a significant number of years (between 15 and 30);
- * they had had appreciable numbers of people on the Institute's training programmes;
- * they had been involved in interesting examples of regional cooperation being promoted by IIEP;

- * they had depository libraries receiving IIEP publications;
- * they had been involved in joint research with the IIEP;
- * in the case of India and Zimbabwe, they contained institutions which had partnership agreements with IIEP; and
- * the choice of Tanzania yielded the additional advantage of adding a 'small state' system, that of Zanzibar, to the mainland: the two education systems are separate, politically and administratively.

Peter Williams spent seven days on the case study in Tanzania (mainland and Zanzibar) in July and was able to do some follow up work in September. By a convenient coincidence, he was to be in Tanzania on a separate assignment for Sida assisting the Ministry of Education and Culture in Dar es Salaam. The two tasks in Tanzania dovetailed very usefully with each other. Kees Maxey visited Zimbabwe for a week in July and India for week in August.

The main purpose of the visit to these countries, as case studies, was to examine the overall impact of the different IIEP activities (training, research, dissemination). A major element in the approach was personal follow-up of the questionnaires returned by the ATP and ITC trainees, allowing the individuals concerned to expand on their answers. Of particular concern was the usefulness of the courses attended to the interviewees in their present jobs, and to their employers. Additionally, the value of the continuing work of the Institute and its publications (including its Newsletter) to this group and to their employing institutions was followed up. Where appropriate, enquiries were also made about co-operation in research. The effectiveness of the partner institution scheme and the depository library system was also to be examined. Brief country case study reports prepared by the consultants are appended.

1.3.5 How the team worked

During the whole of this period, although mostly working separately, the two team members kept in very close and regular contact and met on more than half a dozen different occasions to plan, discuss progress and to finalise the report. A draft was prepared and shared with both the Education Division of Sida and IIEP. Useful feedback was obtained, of which account has been taken in the final version of the report. Sole responsibility for the final report remains with the two independent consultants.

CHAPTER 2

APPROACH TO THE TERMS OF REFERENCE

2.1 Rationale for the Evaluation

Evaluation exercises can serve a number of practical purposes. The **first** has to do with accountability. The agency operating support programmes must be able to demonstrate to those providing its funds that the money entrusted to the agency has been spent wisely and well in pursuit of the given mandates. The **second** is as an aid to decision-making on future policy. The **third** is as an instrument for programme improvement, with the potential to draw attention both to areas where mandates are being successfully fulfilled and to others where programmes may usefully be strengthened, or if necessary realigned. **Finally**, an evaluation may serve an information and educational purpose: both through increasing the self-awareness of the actors in the institution or programme being evaluated, and by promoting a wider understanding among its sponsors, partners, clients and friends of the context in which it is operating, of the nature of the operations undertaken, and of the challenges being faced.

The first two of these are the ones most directly relevant to the present evaluation of support by the Swedish International Development Cooperation Agency (Sida) to the International Institute for Educational Planning (IIEP). In the first instance Sida is accountable to the Swedish Parliament, and ultimately to Swedish electors and taxpayers, for the money it spends on international development co-operation. Sida has been supporting IIEP financially for almost thirty years and it is proper that the Agency should satisfy itself, and be able to reassure Parliament, that the funds have been well spent; particularly at a time when the aid budget is under pressure and when there are many competing claims, both from within the aid budget and from other sectors of the economy, for public funds. The second reason we cited for the conduct of evaluations, as an aid to decision-making, also applies in this case: the current phase of Sida financial support to IIEP, following the six-month extension from 1 July 1996, expires at the end of December; and any new agreement must be put in place before the start of 1997.

The third and fourth possible reasons for conducting evaluations, cited above, were not specified as objectives in this case. Therefore if this evaluation should turn out to serve either of those purposes, any benefits derived are incidental by-products of the exercise rather than planned outcomes on the part of Sida and IIEP.

2.2 Past evaluations of Sida support for IIEP, and of the Institute's work

Although this is the first external evaluation of Sida support for IIEP, the Agency has of course kept its assistance to the Institute under continuous review. In formal terms this has involved the requirement that regular financial reports on the use of Sida funds, and periodic reports on IIEP's programme activities, be submitted. Informal meetings between IIEP and Sida Education Division staff to review progress have taken place once or twice a year, and somewhat more formal ones on the occasion of the negotiation of each new agreement.

In 1986, at the end of the period covered by the Fourth Agreement (1982-1986), IIEP prepared a review of IIEP-Sida co-operation from 1973 to 1986. Again, in connection with the last renewal of Sida support, in June 1994, IIEP produced a report covering the period of the Seventh Agreement which ran from January 1993 to June 1994, and the drafts of both

reports were made available to the consultants. Although referred to in our terms of reference as an 'internal evaluation', the 1994 document is actually more in the nature of a descriptive account of IIEP's activities over the 18-month period, with more detailed reporting on the operations undertaken with Sida funding.

An external evaluation of IIEP took place within the framework of an entire UNESCO evaluation in 1981, but is not available. In 1994 there was a proposal for an analysis of UNESCO's activities in the area of education policy, planning and management, including IIEP, and the Institute prepared material in anticipation of this in the form of an 'Evaluation of the Implementation of IIEP's Fifth Medium Term Plan (1990-1995)'. In the event, however, financial pressures at UNESCO, and changing priorities on the part of member states, aborted this exercise. No other assessments of IIEP's overall activities have been brought to our attention.

There is more material on the Annual Training Programme (ATP). An annual exercise is undertaken at the end of each course to obtain feedback from the trainees and the results are summarised in a short in-house report. We were given those for recent years. A similar but less elaborate process is applied to obtain feedback in the case of many of the intensive training courses. In 1986 an internal report was made on a tracer study of all those who had completed the ATP in 1983/84 and 1984/85. In 1996, in conjunction with this evaluation of Sida support to IIEP, a new follow-up study has been mounted of all trainees completing the ATP between 1990 and 1995. The 1992 Report of Activities by IIEP drew attention to an external evaluation report on the ATP, which (with accompanying internal reports) 'may be considered as useful reference documents which will serve as a basis for further work aimed at a progressive adaptation of the annual course in the years to come'. The consultants have seen this report but have been informed it is not for citation.

Routine monitoring of IIEP activities takes place internally by the Director and staff, and by the Institute's Governing Board; and externally in the context of budget sessions at UNESCO. On the occasion of UNESCO's biennial General Conference the work of IIEP is reviewed by the Education Commission of the Conference, on the basis of written submissions and an oral presentation by the Board Chairman. IIEP is punctilious in meeting its reporting obligations to its own Board and to UNESCO: each year the Director submits a report on activities to the Board, and IIEP then publishes an annual report. Both series are complete and up-to-date to the end of 1995.

2.3 Interpretation of the Terms of Reference of the Present Evaluation

As the terms of reference (Appendix 1) require, the focus of this evaluation is

- i) the relevance of IIEP activities which Sida has agreed to support to the achievement of the objective of the agreement;
- ii) the extent of realisation of the objectives established for different sub-components of the programme;
- iii) the efficiency, including cost aspects of execution of these activities; and
- iv) the impact of training activities in Sida programme countries.

The terms of reference also state that

In addition to the impact of the support at country level, the consultants should also consider the overall impact of the IIEP internationally, and in particular on Sida's Education Division.

The above questions shall be addressed to each sub-component of Sida support but also holistically so that the more general impact of training, research and dissemination activities in educational planning internationally can be taken into account in the findings of the evaluation.

2.2.1 Scope of the Enquiry

Before addressing each of the above in turn, it is useful to consider the scope of this enquiry.

In the first place, can the assessment usefully be confined to individual components or sub-components of Sida-supported IIEP programmes (training, research and studies, institution-building, dissemination etc), as distinct from the broad programmes themselves?

Obviously, in looking at the second of the four items above, compliance with the agreements, one can relatively easily restrict one's field of vision to particular obligations and activities for which the money was committed, asking whether they have been carried out and the extent of the deviation from what was intended.

But when one moves to consideration of the relevance, efficiency and impact of IIEP activities supported by Sida (items i, iii, and iv above) it is more difficult to decide how broad or restricted the focus should be, and where the balance should be drawn between consideration of the details of particular projects on the one hand and assessment of relevance, efficiency and impact of the broader programmes of which they are part on the other. We note that there are few classes of activity which Sida, as the largest voluntary contributor to IIEP in recent years, has not supported in part; and that Sida-supported activities are not a different *genus* of IIEP activities with their own special mode of design, management and financing, but form part of an overall programme.

In the case of the ATP, which has accounted for about half of Sida's contribution to IIEP, it is appropriate to consider the programme as a whole; for as we understand it Sida support of 15 (in the latest period) trainees annually is conceived as being a contribution to the overall activity rather than to specific individuals. Indeed, we were told that in only one year has Sida itself asked for the names of trainees it was supporting. However, in considering the other IIEP programmes like the ITCs, seminars and workshops, research and studies, institutional development and training of trainers, and dissemination more generally, we have tried to combine and balance the two approaches of considering Sida-supported activities and also the overall programme of which they are part.

A wider problem is to avoid shift of attention from assessment of individual programmes and projects to the institution (IIEP) as a whole. The fact is that the various components and sub-components of IIEP activity are not discrete: IIEP claims that training, research, institutional development and dissemination are closely inter-related facets of its overall mission, and that

none of these major functions can be properly understood in isolation from the others. Since it is also the case that virtually every project and programme that IIEP mounts - even those attracting donor support - is 'subsidised' by the Institute in terms of overheads, and the budget is not presented in output budget terms (which would attribute a share of staff and other overheads to each project), it is clear that evaluation of particular IIEP activities must inevitably spill over at times into consideration of IIEP's overall staffing, budget etc.. However, while our terms of reference ask us to consider 'the overall impact of IIEP internationally', and to look at the Institute's programmes holistically, they do not expect us to evaluate the institution itself except in those senses. We shall endeavour not to cross this boundary.

2.3.2 Evaluation Criteria

2.3.2.1 Compliance with Agreements

There have been three agreements since 1990. We have concentrated on the second half of the period as being more recent. IIEP itself presented a report on the extent of activities under the Seventh Agreement from January 1993 to June 1994. In brief, the picture this presents is one of reasonably complete implementation of what had been agreed (see section 5.2). In the case of the Eighth Agreement, from mid-1994 to mid-1996, we have prepared a detailed chart summarising the extent of implementation (section 5.3 Table XV).

2.3.2.2 Relevance

This is defined as relevance to the achievement of the objective of the agreement, namely 'to promote effective educational planning in developing countries by strengthening their national capacities for planning and managing sustained development of their educational systems'. One can ask in relation to each of the main activities whether the form and programme design, the actual content, the internal processes and manner of execution of the programme or project are appropriate to the achievement of the overall objective.

At first sight it seems comparatively straightforward to make such an assessment, but appearances can be deceptive. For example, which is more relevant: development of capacity to understand issues and options, or mastery of specific skills of forecasting and computing? Is one through training primarily concerned with filling slots (staffing vacant positions) in planning units; or in admitting talented individuals who come from, or may later work, elsewhere in the public service? How much of a disaster is mobility of well-trained people? In this era of decentralisation and privatisation does 'national capacity' primarily refer to official capacity at central government level or would it also include district personnel, and a Catholic schools secretariat or a Muslim education foundation? Who judges whether cost-sharing and cost-recovery are the key to sustained development, and should or should not therefore be the subject of research studies? The consultants conclude that a wide interpretation of 'relevance' is appropriate.

Assessment of relevance also presupposes a considerable knowledge of the local context. Can the candidate for training make any difference in a particular work situation? Is the subject of study or research relevant to current and evolving national circumstances? Such wider questions must be at the back of the consultants minds even if they cannot always provide the answers! They underline the importance of IIEP constantly engaging in needs analysis, an

area which we have not been able to investigate as thoroughly as we would wish. For a very few countries our own involvement in case-studies afforded us some limited insights into national concerns and needs but we claim neither to have gone into great depth, nor that these particular national situations are typical.

There will be more than one valid perspective on the relevance of IIEP activities. The IIEP staff who manage or 'deliver' the programmes, the individual clients (participants and trainees), and the developing country sponsor (a senior government official perhaps) may all take a different view of what is required most. In this study the consultants attempt to obtain a spectrum of views. In the case of training there are the opinions of trainees as recorded in end-course evaluations of the ATP and ITCs; the results of the ATP tracer studies; and the views of former trainees interviewed, in many cases some considerable time after their involvement in the ATP or an ITC, in the course of our enquiries for the country case studies. Comments were also forthcoming from Ministry officials in the case-study countries on, for example, affordability of training and location of courses, as well as from IIEP staff themselves. In terms of research, questions about relevance also necessitate reference to existing situations and current policy concerns of governments, and careful consideration of the closeness of the research to practice. With regard to institution-building one can ask whether the programme's inputs are the most critical ones, whether the institutions chosen are strategically placed to improve planning and managerial capacity in their countries, and whether they are capable of responding to demands upon them.

2.3.2.3 Efficiency

The consultants consider this from two principal points of view, that of managerial competence/effectiveness and that of cost. Useful indications of managerial efficiency include congruence between goals set and those achieved, the execution on time of planned activities, evidence of order and orderliness (personnel supervision and financial control systems, established procedures and routines) in operations, the existence of monitoring and reporting arrangements, availability of documentation, good communications and the existence of common understandings among the actors.

Analysis of cost efficiency is complex because the structure of the IIEP budget does not easily lend itself to calculating outlays per unit of output. It has been possible to obtain notional figures for the ATP and for publications in the Fundamentals of Educational Planning series, for example, but the consultants are not able to provide more than indicative figures. All the normal reservations concerning cost studies of this type have to be sounded in this case too.

- * It may be too limiting to assess the output of the ATP purely in terms of numbers who take and complete the course, because the training has all kinds of spin-off for the rest of IIEP's activities in research and institution-building, and lays foundations for later fruitful co-operation with partner countries.
- * Whilst it is tempting to compare directly the cost of training of an ATP trainee and a student at a European or North American university, the validity of such an exercise rests in part on judgments that the product is identical.
- * The costing-base varies across different IIEP activities. It is important to know in each case whether staff costs are included in the project budget or not: for some of those funded by Sida, IIEP staff costs are included but this is not invariably true.

- * Even if one could satisfactorily assign the totality of IIEP's expenditures across the entire range of outputs of the Institute, there are significant resources that do not enter the cash accounts, such as the use of physical resources contributed by France.
- * One must recognise that beyond expenditures on IIEP programme activities from its own budget are those from its partners' budgets. Many programmes are carried out in association with other agencies and in assessing global outlays on a particular activity the amounts appearing on the budgets of developing-country partners or co-funding agencies should also be reckoned.

2.3.2.4 Impact at country level

At this point the study goes beyond inputs, process, and product at the point of programme completion (thirty trainees trained, a research report published), to a diachronic analysis of whether over an appropriate period of time the Sida-supported IIEP programme has had the desired effect on national development. Was the trainee more effective on the job? Did he or she get promotion, or leave educational planning? Did they use IIEP methods and materials to solve problems? Did people read research reports and did that have any effect on policy and practice? Has IIEP's partner institution gained in training or research capacity as a result of the partnership programme?

Some information is available to the consultants about this from the ATP tracer study, from country case studies and from information provided by IIEP staff and others. Caution is necessary in making judgments about IIEP programmes on this evidence, given that so many factors combine to produce effective or ineffective long-term outcomes of IIEP programme activities. For example, IIEP neither fully controls the quality of inputs (for example the trainees sent on the ATP or ITCs), nor can it prevent them being misused on their return home after training. Moreover, the ATP or an ITC represent only one of several training programmes that an individual may have completed.

2.3.2.5 Impact internationally and on Sida

Without attempting definitive answers uncalled for by the terms of reference, we suggest that evidence could be adduced about international impact from three standpoints. The first is IIEP's role in relation to its main clientele, who are governments and institutions in developing countries, and concerns IIEP's contribution to helping them to develop their capacities in educational planning and management. Evidence on this is rather diffuse. The range of countries from which trainees have come, the locations of workshops and seminars, and the country focus of studies gives some indication of 'reach'. Evidence of influence and impact comes from reports of debates in the General Conferences of UNESCO, from senior personnel in the countries where the case studies were conducted, and from enquiries among selected professionals from developing countries.

A second relevant international constituency might be IIEP's professional peers. Do the Institute and its products command their respect? Is the IIEP's performance in the professional role of advancing its subject in the international arena well regarded? Even to ask these questions invites the objection that IIEP is not an academic institution in the ordinary sense and ought not to be judged by the criteria that would normally be applied to them. On the other hand much of IIEP's activity could be described as quasi-academic endeavour. Indications of professional impact and influence might include evidence of readership and

citation of IIEP publications, use of its training materials, and be drawn from book and journal reviews and so forth. Soundings of opinion in the international professional community of scholars and practitioners in educational planning and management could also be relevant. As explained in Chapter 12, we did make some enquiries along these lines but do not feel justified in drawing substantial conclusions on the basis of them.

Third is the interaction between IIEP and a range of international co-operation agencies with whom it collaborates in various practical ways and for whom it provides a staff training resource and a dialogue partner in addressing issues of education policy and planning in developing countries. IIEP's hosting of the Association for the Development of African Education, and its role of Secretariat to the International Working Group on Education is relevant to this. In Chapter 11 IIEP's role as a dialogue partner with Sida is considered and in Chapter 12 its broader international impact.

PART B. THE CONTEXT: IIEP's WORK AND Sida SUPPORT**CHAPTER 3
IIEP AND ITS WORK****3.1 Introduction****3.1.1 Mandate and relationship to UNESCO**

The International Institute for Educational Planning was founded by a resolution of UNESCO in 1962 and formally came into being in April 1963. According to its statutes, the aims and functions of the Institute are as follows:

Article II Aims and functions

'1. The purpose of the Institute is to promote instruction and research on educational planning in relation to economic and social development.

2. To realize this purpose, the Institute will:

(a) provide instruction, by organizing in-service training courses, seminars and symposia, for senior civil servants, educational planners and economists or experts attached to institutions responsible for the promotion of social and economic development;

(b) endeavour to co-ordinate existing knowledge and experience gained on this subject, and to promote research into new concepts and methods of educational planning likely to further economic and social development.' (IIEP Basic Texts - July 1995 edition)

IIEP was established 'within the framework of UNESCO'. There are two other institutes within UNESCO's framework: the International Bureau of Education, Geneva, and the UNESCO Institute of Education in Hamburg. The Directors of the three institutions meet regularly and follow each others' Governing Board meetings. In its own research and training, the IIEP acts in conformity with the general policies outlined in UNESCO's Medium-Term plans. The Chairman of the Board reports to the biennial General Conference of UNESCO.

The Governing Board consists of 12 members chosen for their competence and sitting in a personal capacity. Four of the members are designated, one each by the UN Secretary General and by the World Bank, and the other two nominated by rotation from a number of major UN organisations. Four members are elected by the Board from among education, economics and other specialists from the four regions: Latin America and the Caribbean, Asia and the Pacific, Africa and the Arab States. Three others are elected on a non-geographical basis from among educators 'recognised for their contribution in the field of human resource development'. Finally, there is a chairman selected among educators, economists and other specialists. The Governing Board meets once a year and an Executive Committee composed of the Chairman plus four others meets in between times as necessary.

The funds of the Institute are in a special UNESCO account, and the Comptroller of UNESCO has overall responsibility under the Director-General for its finances. However he or she can delegate this function to the financial officer of IIEP.

The Institute receives a major part of its financial resources, in recent years, up to half of the income in its main budget, through UNESCO. In some past periods the contribution through UNESCO has been over half - sometimes over 60% (see section 2.1.4.6 on Finance).

3.1.2 Facilities

The Institute is housed in a building provided as a contribution in kind from the French Government. It has a documentation centre and library which is open during the working week (Monday-Friday inclusive). It has a fully fledged print shop with the ability to do very variable length print runs. Staff members are connected, via UNESCO, to the Internet. It has a large lecture theatre (now being partitioned in the interest of more intensive space utilisation) as well as a number of seminar rooms (most with simultaneous interpretation facilities), offices, a computing network for staff and students and a range of communications. The building has an underground car park for staff, a canteen and a large reception area on the ground floor.

3.1.3 Staff

The Institute has 55 members of staff, a size conforming closely with what was envisaged when the Institute was founded. The secretariat of the Association for the Development of African Education (DAE), which is housed in the Institute, has a further four. The staff list as at 15 October 1996 is appended. The Director and staff members are regarded as officials of UNESCO with the corresponding duties, rights and privileges.

The Director is appointed by the Director-General of UNESCO on the recommendation of the Governing Board. The present Director, Jacques Hallak, is the sixth to hold this post. Mr. Hallak holds the personal rank of Assistant Director-General of UNESCO.

Staff appointments are made by the Director who receives the advice and agreement of the competent UNESCO bodies. The Board is consulted in the appointment of senior officials. All staff are on two-year contracts. While every attempt is made to reflect an appropriate geographical balance among members of staff, IIEP is not subject to the country or geographical 'quotas' that apply in UNESCO. This means that professional considerations can be predominant in making appointments.

The office of the Director has four staff. The other major sections are the following:

Programme (Training and Research) with 17 professionals (including Residential Fellows) and 11 support staff;
Publications (which includes a significant print shop) with 12 staff;
Documentation Centre (which houses the Institute's library) with four staff; and
Administration and Finance with six staff and four retained staff.

There has been significant growth of staff, particularly Programme staff, between 1990 and 1996 with a marked increase in the number of female employees (shown in brackets).

Table I Change in composition of staff between October 1990 and October 1996

Unit	1990	1996
Office of Director	(2)3	(3)4
Administration & Finance*	(2)5	(4)7
Programme (Training & Research)		
i) Professional staff	12	17
of which women	(3)	(8)
from Africa	[1]	[2]
from Asia & the Pacific	[3]	[3]
from Latin America & the Caribbean	[1]	[1]
from Arab States	[1]	[0]
ii) Support staff	(9)9	(10)11
Publications	(7)11	(6)12
Documentation	(4)4	(4)4
Total*	(29)48	(35)55

*Not including persons on retainer contracts (four in number in both periods)

Below the Director, the Administrator (presently Mr. I. Antoniades) and Senior Programme Coordinator (Mr. G. Carron) hold established 'D1' posts, as does Mr. B. Sanyal (Senior Advisor in a personal capacity); and there are four staff at the next grade (P5) of Senior Programme Specialist (Caillods, Hall, Mählck and Ross) who as well as being senior professionals take on the task of leading research teams (Caillods and Ross), serve as Head of Training (Mählck) or take charge of dissemination activities (Hall).

The leading individual in each of the sections, apart from Programme (Training and Research), was the same at the beginning and end of the period. Within the programme section, only five of the 17 professional staff in 1996 had been in post in 1990 - four of these five were at senior level and have been there for well over a decade. There has been a major increase in the number of women professionals recruited to this section. This increase in staff is related to the large expansion of programme activities.

3.1.4 Activities

The basic mandate of the Institute is twofold: training and research in educational planning. This has been further elaborated to include policy formulation, evaluation, management and administration.

The Institute's activities, though interlinked, can be classified under three principal headings:

- Training
- Research
- Dissemination

The Institute has the further important role of providing a meeting ground for senior educational administrators and academics, particularly from the less developed countries, to exchange views with colleagues and members of the Institute's professional staff. It also makes available technical assistance on a limited scale and provides services and infrastructure for two international groups.

3.1.4.1 Training

The training programme has a number of different components.

3.1.4.1.1 *The Annual Training Programme (ATP)*

The ATP has been conducted since the Institute started in the mid 1960s. At present, it takes place in Paris over an eight-month period following an initial month of self-study in the trainee's home country before leaving for Paris. Thus the course starts at home in September, the students arrive in Paris at the beginning of October, and the course finishes at the end of May of the next year. The languages of instruction are English and French, with simultaneous interpretation when appropriate.

The month of self-study in September is the basis of a presentation of the education system of each participant's home country.

The first three months (October to December) in Paris are a common core for all participants.

In the next phase of two months (January and February), trainees can choose between two streams, each lasting for five weeks: Basic Education for All, and Education and Training for Development.

At the same time, the trainee starts working on his or her terminal paper - which can be written on a range of topics relevant to the trainee's country or professional needs. Preparation of the terminal paper will continue alongside other activities until completion towards the end of May.

In January to April there are a number of specialised modules from which trainees can select. In the 1995/96 programme, seven modules were available (two of them in parallel) and trainees selected up to five. Modules last from four days to just over two weeks.

There are two study tours to gain an understanding of the administration and planning of education in different countries. The study visit in France is part of the common core in the first three months. There is also a visit to another country - which over the period since 1989/90, covered the following: Turkey, Cyprus + Austria, Norway, Malta, China, Switzerland and Germany.

On completion, the trainees are given a Certificate of Attendance which summarises in some detail the content of the course they have taken.

Most of the course is taught by members of IIEP's professional staff but, where appropriate (particularly for some of the modules), outside experts contribute on a consultancy basis.

The course is advertised on a world wide basis through UNESCO offices, the national commissions of UNESCO, the Internet (very recently), former ATP students and any other contacts. The leaflet makes it clear that it is targeted particularly at applicants from the 'least developed' countries, and at women. The target age range is 30-45 for people who are either practitioners in education ministries or who are teachers of educational planning, administration and the like. They need both a first degree from a university (or equivalent) plus some initial training in the field. The nominating body must commit itself to taking the trainee back to his or her previous position or another one relevant to the training. (It is not clear how this is monitored.) Two confidential references are sent to the Institute. Finally - and very importantly - the applicant is required to prepare a statement of up to four pages stating why he or she wishes to take the course, how it will relate to previous training and experience, and what benefit it will bring to the candidate and his or her work. The statement must also outline the educational theme or problem that the terminal paper will address.

About 100-120 valid applications are received every year which are reviewed against the foregoing criteria by the teaching staff. In all, about 40-45 are accepted on an initial basis. The next stage is obtaining funds for the trainee's maintenance and for the study costs (such as the two field trips). The main tuition costs are covered by the Institute as part of its central budget - largely through the voluntary national contributions. Some countries provide the money from their own budgets or obtain outside funding for the trainee costs (maintenance, books and equipment, study visit, etc.). In other cases, the Institute is able to assist in finding funds. It does not have any of its own, but it does have access to funds from two or three donor agencies. A summary table of sources of funding for student support is given below and a more detailed table will be found at Appendix 15.

Table II Number of fellowships for trainee costs (student support) by source of funds

Funding agencies	'89/90	'90/91	'91/92	'92/93	'93/94	'94/95	'95/96	Total
UNESCO	10	7	1	4	2	15	15	54
UNDP & UNICEF	14	10	6	4	2	0	4	40
World Bank	8	5	3	6	7	7	5	41
Bilateral aid agencies	6	15	18	22	16	8	10	95
Own government	6	3	5	3	4	5	3	29
Other agencies	4	1	3	2	3	0	2	15
Trainees' own funds	1	1	3	0	0	0	0	5
Total	49	42	39	41	34	35	39	279

Note: UNICEF funded one student; EEC/EU (under 'Other agencies') funded three.

In the main, the fellowship funds are administered by the Institute itself or by the French National Commission for UNESCO.

The regions of origin and the gender of the trainees is given in the table below. The number and proportion of women is put in brackets.

Table III Region of origin and gender of ATP trainees

Region	'89/90	'90/91	'91/92	'92/93	'93/94	'94/95	'95/96	Total	% F
Africa	(6)28	(2)21	(5)21	(6)23	(4)19	(3)18	(6)19	149	(21%)
Arab States	(1)6	(1)2	(0)3	(1)1	(0)2	(0)4	(0)2	20	(15%)
Asia & Pacific	(3)8	(3)11	(1)8	(3)12	(2)4	(3)7	(7)13	63	(35%)
Latin America & the Caribbean	(2)4	(5)7	(2)3	(3)3	(2)4	(3)4	(1)3	28	(64%)
Europe & North America	(1)3	(0)1	(4)4	(1)2	(1)5	(1)2	(0)2	19	(42%)
Total	(13)49	(11)42	(12)39	(14)41	(9)34	(10)35	(14)39	279	
% female	(27%)	(26%)	(31%)	(34%)	(26%)	(29%)	(36%)	(30%)	

Note: Following UNESCO practice, Mauritania and the Sudan are recorded as Arab States.

Those who attended from the European and North American region all in fact came from Europe and mostly either from the less affluent members (such as Turkey) or Eastern Europe and the Baltic republics.

The total number who have attended the course since its inception in 1965 up to 1995/96 is 1,115 students from 148 countries. 465 have come from Africa (Nigeria 45, Tanzania 31, Zaire 26, Ghana 19 and Zimbabwe 11), 115 from the Arab states (Algeria 19 and the Sudan 18), 268 from Asia and the Pacific (Indonesia 29, Pakistan 28 and India 25), 173 from Latin America and the Caribbean (Brazil 32 and Colombia 20) and 94 from Europe and North America (France 17). The full list is in Appendix 13 and a more detailed analysis showing the number of students from each country supported in Sweden's development cooperation programme, and for successive time periods is in Appendix 12.

Bearing in mind the increased emphasis on building up institutions in the target countries and the training of trainers, the work place of the students was categorised and tabulated. Out of the 279 in the seven courses between 1989/90 and 1995/96 covered by this study, 203 came from government ministries (virtually all with immediate responsibility for education), 63 (23% of the whole) from training and research institutions including colleges and universities and 13 from a range of other organisations such as NGOs and intergovernmental organisations. Of the 63 from training and research institutions, nine came from those which have concluded partnership agreements with IIEP. (A more detailed table is given in Appendix 15.)

3.1.4.1.2 Visiting Trainees

For some years, a number of Visiting Trainees have come to the Institute. Since 1993, a specific VT programme has been devised to allow all individuals to attend specific modules of the ATP on a short-term basis. The full costs of the tuition in addition to living costs, have to be paid. The basic criteria for acceptance of an individual on to this new programme is the same as for the ATP. The programmes available are the two streams in January and February and the modules available in the January to April period. Only exceptionally do VTs join the

common core in the first three months of the ATP. Since the programme began in 1993 it has expanded rapidly. The numbers and regions are shown below for the whole period.

Table IV Region of origin of Visiting Trainees.

Region	1990	1991	1992	1993	1994	1995	1996*	Total 1992- June '96
Africa			3	5	7	14	17	46
Arab States			1	2	2	1	1	7
Asia & Pacific			1	2	1	5	5	14
Latin America & the Caribbean			1	1	4	2	2	10
Europe & North America			2	6	2	5	0	15
Total	8+	5+	8	16	16	27	25	105

* 1 January - 30 June 1996; + Information regarding regions of origin not available

3.1.4.1.3 *Research Fellows*

The Institute has a programme of Research Fellows under its Visiting Fellows programme. Since at least 1990, this has been reported under its Training programme.

In the earlier period, they were called 'Resident Research Fellows (Short Term)', and there were also 'Resident Research Fellows (Long Term)' who appeared on the IIEP Staff and Fellows list and were fully integrated into the research and teaching staff of the Institute. The short term Research Fellows programme is of long standing - but has increased very rapidly in the last few years. The people in this category are those who come with a specific research need of their own or to gain an understanding of a particular educational issue from the Institute's experience or knowledge. The purpose is often to use the Documentation Centre as well as to have the opportunity to interact with the IIEP resident staff. The visits can vary in length considerably. In 1995, for example, they varied from a minimum of one week (four people) to a maximum of 32 weeks. The region of origin of the visiting fellows is shown below:

Table V Region of origin of Visiting Fellows & Research Fellows

Region	1990	1991	1992	1993	1994	1995	1996*	Total 1991-96
Africa		2	5	4	24	8	1	44
Arab States				2				2
Asia & Pacific		2	6	1	2	8		19
Latin America & the Caribbean		1	2	1	10	3		17
Europe & North America		1	3	5	8	5		22
Total	12+	6	16	13	44	24	1	116

* 1 January - 30 June 1996 ; + Information regarding nationalities and regions not available

In 1994 there were two unusually large groups: 19 from South Africa and 8 from Mexico. The first group visited for one week only in connection with the new South African government and constitution.

3.1.4.1.4 *Intensive Training Courses*

The Intensive Training Courses (ITCs) are a means of addressing the training needs of a wider group of people. These courses usually focus on very specific issues. Sometimes these have arisen as a result of research conducted by the Institute. In other cases, they address perennial problems. They are often run in cooperation with institutional partners which may be ministries of education, training or research institutions, international bodies such as UNICEF, or donor organisations such as the German DSE. The design of the courses and much of the input comes from IIEP staff members though there is usually a significant contribution from the region or country in which the course is held.

Over the period of the 6½ years from the beginning of 1990, there were over 1,600 attendances at the courses worldwide. Some people have been to more than one ITC, so the total number of individuals will be less, and is probably a little under 1,500. The distribution of courses by region and the number who attended is given in Tables VI and VII.

Table VI Number of ITCs by the region they were held in

Region	1990	1991	1992	1993	1994	1995	1996*	Total
Africa	1	3	5	2	4	4	4	23
Arab states			1	3			1	5
Asia & Pacific	2		1	4	3	4	1	15
Latin America & Caribbean		1		4	2	1	1	9
Europe & North America					2	5	2	9
Total	3	4	7	13	11	14	9	61

* 1 January - 30 June 1996

Table VII Number of those attending ITCs by the region they were held in

Region	1990	1991	1992	1993	1994	1995	1996*	Total
Africa	22	140	166	41	107	99	92	667
Arab states			19	98			20	137
Asia & Pacific	75		17	91	82	83	23	371
Latin America & the Caribbean		34		95	123	23	20	295
Europe & North America					18	109	72	199
Total	97	174	202	325	330	314	227	1,669
Women - number	47	27	21	95	136	65	58	449
- %	48%	16%	10%	29%	41%	20%	25%	27%

* 1 January - 30 June 1996;

Note: The figures for the regional distribution of attendance and gender have been provided by the Institute.

From this it can be seen that about 40% of the courses and attendance takes place in Africa with a little over 20% in Asia and the Pacific and under 20% in Latin America and the Caribbean. (One course held in Jamaica in 1994 was a distance education course with 97 people.) Six of the nine meetings in Europe took place at IIEP. Some of these Paris-based meetings were held there at the request of governments from other regions.

The majority of the courses took place in English (65%) with French being the next largest language group (18%) followed by Spanish (12%). Other language groups included Portuguese and Arabic.

Only cumulative figures were available for the number of women who attended these courses. The proportion is a little below that for the ATP over the same period.

The topics of the courses were varied, the largest number, dealing with educational management, administration and planning, comprising nearly one third of the courses. Nearly half of these were specifically concerned with higher education, including one distance-education course. Other fairly large groups included courses on education, employment and human resource development, and school mapping and microplanning. Throughout the period, courses were offered on the use of computers for a range of topics (including subjects already mentioned). Other subjects included text book development (one on this topic took place by distance education), the design of educational development projects, the planning and monitoring of the decentralisation of education, and the measurement of educational quality. As noted in Chapter 7 below, the presentations and proceedings of many of these courses are also disseminated more widely through the Institute's Documents series.

3.1.4.1.5 *Seminars, Workshops and Forums*

During the period covered by the evaluation, the Institute conducted or had major responsibilities for at least 55 seminars, workshops and forums. These covered a very wide range - from meetings of high level policy makers at an international level to workshops at national level taking place in less developed countries such as India and in donor countries such as Norway or France. The table below shows the location of the meetings by region.

Table VIII Regional distribution of seminars and workshops by year

Region	1990	1991	1992	1993	1994	1995	1996*	Total
Africa	1	7	1	2	3	5	1	20
Arab states		1			1			2
Asia & Pacific	2	2		1	2	3		10
Latin America & the Caribbean	1		2	1	1	1		6
Europe & North America	3	4	4	3	2	1		17
Total	7	14	7	7	9	10	1	55

* 1 January - 30 June 1996

In general, these meetings are not intended as training courses though some turn out to perform this function. A significant proportion were associated with the conduct of a research project - for the initial discussion of research methodology, for a report of progress in the middle of the study or for the review of case studies in preparation for a synthesis report in the final stages of a project.

Other meetings have gathered together senior figures with particular expertise in a selected field or holding similar responsibilities. The seminar on the impact of HIV/AIDS on education

and the meeting of heads of training institutions in developing countries are examples. Many meetings of this type took place at IIEP in Paris (the venue of 14 of the European meetings).

Some meetings in this category were effectively informal training seminars at national level. Examples are the tour of Namibian education officers in Southern Africa and seminars with aid agencies in Scandinavia.

3.1.4.2 Research

Research is seen as crucial to the training and the results are used in the ATP, the ITCs and the various workshops and seminars as well as being disseminated in the Institute's publications.

The research programme is outlined by the Institute in a series of six-year 'Medium-term' plans. These are linked to the medium-term plans of the parent organisation, UNESCO, covering the same period. Reflecting this, the Institute's own fifth Medium-Term Plan (1990-1995) proposed that the following themes should be followed:

- * Organisation and management of education, giving particular attention to information and communication systems, examination and evaluation systems and the documentation and understanding of managerial systems, particularly in higher education;
- * Educational financing with three research priorities: the role and place of financing mechanisms in improving public sector performance, the respective role of public and private financing, and the impact of adjustment policies on the least privileged and how to safeguard their interests;
- * Basic education - particularly with regard to the measurement of quality, and the identification of the key problems in schools;
- * The development of human resources - particularly focusing on science education in general secondary schools, policies and new trends in technical and technological education and finally the planning of human resources in the light of the criticism of the previous simplistic approaches.

The Sixth Medium-Term Plan (1996 to 2001) of the IIEP takes forward some of these themes (improving the quality of basic education; and efficient organisation, management & finance) while introducing some new ones - particularly in relation to secondary education policy and strategies, and approaches to providing services to under-privileged groups.

It is the intention of the Institute that its studies should be done in partnership with teams in the countries where they are to be conducted. The partnership may be with a ministry of education or it may be with a training institution (part of a university or a training and research institute, often associated with the ministry). IIEP's own research workers, sometimes reinforced with an outside consultant, will negotiate the details of the proposal with local researchers, and monitor the work as it is done. The data collected from a country case study will remain the property of the local researchers or of their institution but usually will be

evaluated and developed in conjunction with the Institute. Often the case study will be presented to an in-country workshop before being brought together with the case studies from the other countries involved in the project in a regional or sub-regional research seminar.

The individual case studies will be written up - when appropriate with editorial help from the Institute - and made available as an IIEP report. In some cases, a synthesis report on the whole project is prepared for wider distribution, drawing on the material from all the individual country case studies. In addition, the intention is that the material should be used for training purposes in the Institute's various programmes (ATP and ITCs) as well as for preparing teaching-learning packages (see 3.1.4.1 above and 3.1.4.5.1 below).

3.1.4.3 Partnership Institutions and Networks

A seminar was held in Paris in December 1990 with the Directors and senior representatives of a number of institutions and colleges involved in training and research for educational planning and administration from the developing world. Partnership agreements have been signed between the Institute and thirteen institutions worldwide. Two agreements are about to be finalised. (See Appendix 16 for a full list.) The regional distribution is given below:

Africa	3
Arab States	1
Asia (6) & the Pacific (1)	7
Latin America (2) & the Caribbean (1)	3
Europe	1

The purpose of the agreements is to strengthen the training capacities of the partner institutions. For example, the libraries of the institutions concerned will receive automatically all of the IIEP publications. In addition, some of the institutions have been involved in running workshops or ITCs, have been assisted in introducing a course in educational planning and administration or have been involved in one or more research projects. The Institute will also develop and provide appropriate training material.

In the case of Asia, engagement of training and research institutions in a collaborative research project has led to the formation of a new network. The Asian Network of Training and Research Institutions in Educational Planning (ANTRIEP) is now formally in existence with its focus for the next two years at the National Institute for Educational Planning and Administration (NIEPA) in Delhi, India. It has the support of IIEP which is itself a member. In addition to IIEP, the other members in the initial stage are from Bangladesh (2), China, India (3), Indonesia, Korea, Nepal (2), Pakistan and Sri Lanka. (See Appendix 16 for the list of founding members.) It is open to others to join. Only two of the six institutions from Asia with which IIEP has partnership agreements are at present members. The network has issued its first newsletter.

In Zimbabwe, collaborative research with the Zimbabwe Ministry of Education and Culture in 1990 on the indicators of the quality of primary education was presented to an ITC with representation from a number of Southern African countries in 1992. A number of these have joined together to do a sub-regional study of the quality of primary education under the auspices of a semi-formal network called the Southern African Consortium for Monitoring

Educational Quality (SACMEQ). (See Appendix 14 for the list of members.) This coordinates collaborative studies among Ministries of Education in the sub-region and aims to provide hands-on training and experience to the responsible Ministries rather than with the specific training of trainers. It hopes to formalise its structure in late 1996 as a semi-autonomous organisation based at the UNESCO sub-regional office in Harare.

3.1.4.4 Documentation Centre

The Centre acts as a research library for the Institute, for its staff, the trainees and visitors. At the end of 1995, it had a stock of 38,000 books, reports and documents. It makes about 1,000 acquisitions per year. It has catered for 50 to 75 readers per month during the 1990s. Its stock is also available for loan. A little over 2,000 borrowings are made per year of which about one quarter are of periodicals.

It has a range of bibliographical databases covering the Institute's particular interests in educational planning and related fields. It is also connected to outside data bases such as the Educational Resources Information Centre, USA (ERIC) and the International Bibliographical Database on Higher Education (HEDIB).

3.1.4.5 Dissemination

The principal means of disseminating the research studies of the Institute and making available up-to-date knowledge about educational planning and administration is through the publication programme of the Institute. Publication is mainly by print - but IIEP also has a web site on the Internet (part of the UNESCO site) and it has produced a number of videos. The training programme itself is an important form of dissemination. In addition, in their professional capacities, staff attend academic and other meetings and produce papers both for these meetings and for publications and in journals.

3.1.4.5.1 *Publishing programme*

The published output of IIEP can - following UNESCO usage - be divided into two principal categories, 'Publications' and 'Documents'. 'Publications' become UNESCO publications, they are advertised in the UNESCO catalogue, and are for sale: the 'best-sellers' among them are sometimes co-published by UNESCO and a commercial publishing house. They include, for example, the Fundamentals of Educational Planning series, and major synthesis reports and monographs produced by the Institute. IIEP receives a commission on each copy sold (UNESCO sends several copies to those on its free distribution list as well) but this is net of a contribution made towards UNESCO's distribution costs. The Institute prints many of these books itself. 'Documents' are more numerous and are published by IIEP solely under its own name: they tend to be given free to those in developing countries but those from industrialised countries will normally be asked to pay a distribution charge. In 1994 IIEP added a new category: 'Teaching Materials'.

During the six years from 1990 to 1995, a total of 170 publications and documents were published - many in more than one language. There are currently about 347 titles available, and listed in IIEP's catalogue, which is revised annually. 75% of these are Documents, and 25% Publications (88 of which 51 are in the Fundamentals series). Because of the very high priority given by IIEP to ensuring that publications and documents reach those who need them in developing countries, income from this source is relatively modest at \$4,000 to \$5,000 per

annum. The output of new titles between 1990 and 1995 is recorded in Table IX.

Table IX Production of Publications, Documents and Teaching Materials

	1990	1991	1992	1993	1994	1995	Total
<i>I Publications</i>							
Books	3			1		1	5
Fundamentals of Educational Planning	2	2	4	2	3	1	14
<i>II Documents</i>							
ITC & workshop reports		8	4	6	6	4	28
Research Reports	11	4	5	1	5	2	28
Educational Forum Reports	1	2		1		1	5
Research and Studies Programme		10	12	10	19	6	57
Other papers	5	6	5	5	7	2	30
<i>III Teaching Materials</i>							
Teaching materials					3		3
Total	22	32	30	26	43	17	170

Note: Only one language version of any one title is counted. New editions of old publications are included.

The Institute is considering making available some of the Documents via its web site.

3.1.4.5.2 *IIEP Newsletter*

This is an A4 publication which appears quarterly. In 1990, it was six pages in length and was available in English, French and, for the first time in 1990, Spanish. By the middle of 1991, it had between 12 and 18 pages. The Russian edition first appeared in 1994 and is translated and dispatched from St. Petersburg. The others emanate from Paris. Recent issues contain articles covering reports on IIEP research, workshops and important meetings relevant to educational planning and administration. It also lists recent IIEP publications and forthcoming events. Nearly 10,000 copies are distributed, 5,000 to former IIEP trainees from both the ATP and the ITCs and the remainder to a wide range of relevant institutions and interested individuals. The full text is also featured on the Institute's web site.

3.1.4.5.3 *Contributions to outside conferences, journals and publications*

IIEP staff attend and contribute to a number of outside conferences and meetings every year as well as to a number of publications and journals. Over the six years from 1990, 63 papers have been presented at conferences and 12 contributions have been made to journals or to publications such as the International Encyclopaedia for Education.

3.1.4.5.4 *Depository libraries*

Third world libraries have found it increasingly difficult to purchase the Institute's publications because of budgetary and foreign exchange problems. As the publications are so crucial to the dissemination strategy of the Institute, it was decided in 1992 to select a number of suitable libraries in a range of third world countries to which the books and pamphlets could be sent free of charge and on an on-going basis. The programme already covers 35 countries (90 libraries) in Africa, 12 in the Arab States (26 libraries), 15 countries in Asia and the Pacific (32 libraries), 19 countries in Latin America and the Caribbean (28 libraries) and four countries in

Europe (one library each). The long-term aim is to distribute to about 400 libraries.

3.1.4.6 Finance

The finances of the IIEP, although formally under the control of the Comptroller of UNESCO, are accounted separately on an annual basis to the Governing Board of the Institute. These accounts are audited by the external auditor to UNESCO - over recent years, by the Auditor General of Canada. A digest of the accounts is given in Appendix 18.

3.1.4.6.1 Income

A summary of the resources is given for 1990 to 1995 below.

Table X Cumulative resources of IIEP, 1990 to 1995 (US\$)

Income	1990-1995	% cash income	% all resources
Resources credited in the IIEP account			
UNESCO contribution	15,733,140	50.2	34.0
<i>Sweden</i>	3,935,573	12.6	8.5
<i>Nordic (all)</i>	8,187,613	26.3	17.7
Total voluntary contributions	9,993,658	31.9	21.6
Total voluntary + UNESCO	25,726,798	82.0	55.6
Miscellaneous	2,606,272	8.3	5.6
Total contributions & miscellaneous income	28,333,070	90.4	61.3
Total Contracts	2,207,246	7.0	4.8
Supplementary Income	818,480	2.6	1.8
Total cash income	31,358,796	100.0	67.8
Excess of expenditure over income (6 years)	-962,554		-2.1
Grand Total	30,396,242		65.7
Resources credited outside of IIEP accounts			
Physical Resources	5,611,400		12.1
Human Resources	588,200		2.3
Training & Research	9,647,139		20.5
Total	15,846,739		34.3
Total of all resources	46,242,981		100.0

The income is divided into two sections: 'Resources credited in the IIEP account', and 'Resources outside the IIEP account'. Actual spending is mostly in French Francs (FF) - but the currency in which they are formally received and accounted for is US dollars (US\$). Due to variations in the rate of exchange (which can be over 10% between one year and the next), direct comparisons between successive years may be misleading. For example, the Swedish kronor has moved in a comparatively short period between eight to the dollar and 5.5 to the dollar. However the general trends described below are clear.

The 'Resources outside the IIEP account' include the following:

the notional rent of the buildings. The lease of these buildings, plus their upkeep, is a contribution in kind from the French Government; the cost of support by a number of governments for Associate Experts at IIEP; and some of the funds used for training and research. These include the funds for ATP students disbursed on their behalf in accounts which are liquidated at the end of the course; and projects conducted on behalf of UNESCO and UNDP which are recorded in cash in the accounts of the organisations concerned.

Funds used for training and research, in particular, have increased over the period from 1989 to date.

The total cash income to the main account ('Resources credited in the IIEP account') has increased from a little over US\$4 million per annum in 1990 to an estimated US\$6.5 million in 1996. UNESCO is the major source of cash income providing between 42% and 54% during this period.

The voluntary contributions from member states have varied quite widely from 42% of cash income at the beginning of the period to 24% towards the end. The Nordic countries (including Iceland) have been by far the largest group and from 1990 to 1995, Sweden was the largest single contributor. Other regular donors include Switzerland, Ireland and India with occasional contributions from Canada, Mexico and Venezuela. In earlier periods, there have been other major donors such as Germany.

At the beginning of the period, the income from contracts was very small - US\$33,000 (1%) in 1990. It rose in a fairly regular manner to US\$600,000 in 1995 when it comprised just under 10% of the total cash income. In 1996 it is expected to be significantly lower at just over 5%. The two biggest providers of contracts over the seven years from 1990 to 1996 were from UNICEF and UNESCO followed by the French Ministry of Foreign Affairs and the German DSE. Altogether one or more contracts were received from 33 different organisations. The Institute's policy in considering requests for work on contract is that such jobs should fit in closely with IIEP's already planned work schedule.

The main change between 1990 and 1996 in the sources of income has been this fairly steady increase in the value of contracts. Although Sida has had four contracts with the Institute from the beginning of 1990, this source was a small part of its total financial input to the Institute and comprised only 4% of the total income from contracts.

3.1.4.6.2 *Expenditure*

A summary of the expenditure from 1990 to 1995 inclusive is given in the table XI. This is expenditure from the main account ('Expenditure in cash' from 'Resources credited in the IIEP account').

Table XI Cumulative expenditure in cash from 1990 to 1995 inclusive (US\$)

	1990-1995	% total
--	-----------	---------

Training	12,419,388	37.7
Research	5,676,910	17.2
Documentation Centre	1,827,307	5.5
External Cooperation	737,441	2.2
Dissemination	5,692,150	17.3
Total Programme	26,353,196	80.0
Governing Board	1,077,122	3.3
General Administration	5,494,430	16.7
Total Administration	6,571,552	20.0
Grand Total	32,924,748	100.0

Training takes about one third of the total expenditure on the main account, but it has been dropping in the last few years. It rose from 38% in 1990 to 42% in 1992 but is estimated to be 27.5% in 1996. Of this sum, the ATP and Visiting Trainees take a little over half.

Expenditure on research has remained fairly stable at about half of the level of the training budget - between 15% and 18% of the total. Dissemination is the other major form of expenditure - between 15% and 20% of the total.

The administrative function takes between 18% and 21%, including the cost of the Governing Board at 2-4%. It is important to recognise that the administrative function performs more than a simple support role. For example, the head of Administration and Finance is regularly involved in assisting potential trainees getting funds for their living expenses, etc. Quite separately, he has also been involved in the negotiations to set up the SACMEQ project as an NGO based in Zimbabwe. A small, but very much appreciated, part of Sida's voluntary contribution goes towards this part of the Institute's budget.

3.1.4.7 DAE and IWGE

The Association for the Development of African Education (DAE) was established under World Bank leadership in 1988 as a body (then called 'Donors to African Education') to provide co-ordination and exchange of information among donor agencies and to mobilise international support for African education. Although useful (and including participation of up to 50 development agencies), it became clear that the active involvement of the African ministers of education was desirable to make the collaboration more effective. The association was therefore expanded to include the ministers. In 1992, to foster a broad sense of ownership and to ensure the full confidence of the African ministers, the World Bank proposed that the secretariat function move out of the Bank. The members then decided to place the secretariat at the IIEP in Paris.

The permanent secretariat of DAE is funded on a voluntary subscription basis (typically US\$50,000 p.a.) by the development co-operation agencies which are thereby entitled to a seat on the Steering Committee. IIEP's contribution, made in kind, amounts to approximately US\$60,000 per annum. DAE has a small but distinct suite of offices within the Institute. It is fully serviced by the Institute's administration but its finances, though administered by the Institute's finance officer, are separately accounted for and audited. Ingemar Gustafsson from Sida is the present Chairman of the Steering Committee and the Director of IIEP serves ex-officio as Vice-Chairman.

The DAE holds a biennial plenary meeting of its members, runs nine working groups on topics of importance to its membership, is providing basic statistical material on the continent's education and publishes a quarterly newsletter which is printed by the IIEP. In 1994 the DAE was evaluated and certain changes were made in its structure and procedures as a result.

The Institute provides the secretariat for the International Working Group on Education (IWGE), which is a group of international and bilateral donor agencies concerned with promoting educational development in developing countries. It is a forum for the exchange of information and experiences, for addressing topical issues in international co-operation and for co-ordinating approaches and views. The meetings are attended by about 40 agency representatives and take place every one or two years. Recently they have been held in Nice in the South of France. With the advice of a steering committee IIEP draws up the agendas, invites speakers and commissions papers, and prepares and disseminates reports of the meetings.

CHAPTER 4

Sida SUPPORT FOR IIEP

4.1 Sida's Support to Education in Developing Countries

The assistance which Sida gives to IIEP falls within a broader framework of policies of Swedish support for international development. Compared with other countries, Sweden has a large aid programme in relation to the size of its population and economy. According to the 1995 report of OECD's Development Assistance Committee, in 1994 Sweden was the ninth largest national contributor of official development assistance, with a total of US\$1,819m in that year. In terms of the proportion of GNP devoted to official development assistance Sweden (with 0.96%) ranked third after Norway and Denmark. In 1992 Sweden had given 1.03% of GNP. In the latest phase of economic adjustment in Sweden, however, international assistance will be reduced as part of overall cuts in government expenditure, and it is foreseen that the proportion of GNP devoted to co-operation programmes may fall to the UN benchmark minimum target of 0.70%.

One of Sweden's basic policies is to uphold and strengthen the UN system, including where appropriate its reform and development. Sweden's substantial voluntary contributions to the development programmes of UN agencies, including its long-standing support for IIEP, should be seen within the framework of this overall stance. In addition to its multilateral contributions, Sweden has also conducted a vigorous programme of bilateral aid. In this case both because of its own size and in the interests of making a significant impact in needy countries of particular interest to Sweden, the assistance is concentrated on 21 countries, of which twelve are regarded as principal recipients of educational aid. These twelve countries are, in Africa, Botswana, Ethiopia, Guinea Bissau, Mozambique, Namibia, South Africa, Tanzania, Zambia and Zimbabwe; and in Asia, Bangladesh, India, and Sri Lanka. While these countries differ from one another they have - with a few exceptions - the shared characteristics of having engaged in a liberation struggle from colonial or racial oppression, of suffering from many of the most acute problems of poverty, of striving to establish or maintain democracy, and of having (or having had) governments with a political orientation sympathetic to Sweden's own. In some instances the list of countries also reflects close historical links between Sweden and the recipient at country level or through non-government institutions and churches.

In the last full financial year for which figures are available, 1994/1995, Sida planned expenditure of SEK510.6 bilateral education assistance. In that year all the above-listed countries benefited except India, where the agreement with Sida for support of the huge Rajasthan basic education project was not yet signed. Among these countries the principal individual recipients of Sida educational assistance were South Africa with SEK56.5m, Mozambique 54.7m, Zimbabwe 43.0m, Tanzania (which in terms of intended disbursements in that year would have been the largest recipient at SEK64.4m) 41.1m, Namibia 39.5m, Ethiopia 33.6m, and Bangladesh 33.5m. Taking bilateral education aid as a whole, the actual disbursements were SEK421.7m which represented 83% of planned expenditure.

4.2 Relationship with IIEP

Over the whole of its history IIEP has enjoyed especially close relations with the Nordic countries, most particularly with Sweden. Twice a Swede has chaired IIEP's Governing

Board: Professor Torsten Husén served as the second Chairperson from 1969 to 1980; and Mr Lennart Wohlgemuth, the fifth and current Chairperson, assumed this role in 1995. Through Sida, the Swedish International Development Co-operation Agency (known until recently as the Swedish International Development Authority), Sweden has in many years been largest source of voluntary cash contributions to IIEP. This has not invariably been the case: in the 1970s the Federal German Republic was much the largest financial contributor in some years, and in 1996 Norway heads the list. Moreover the imputed value of France's contribution in kind (provision of IIEP's premises) would make it the largest bilateral donor to the Institute overall.

4.2.1 The Support Agreements

Swedish voluntary financial support to the Institute began in 1969, and has been governed by eight successive agreements up to the present. The operative periods and the extent of this support can be summarised in financial terms, as shown in Table XII.

This evaluation is concerned with the period 1990 to 1996 and is therefore particularly concerned with the sixth, seventh and eighth agreements, covering the periods 1990 to 1992, January 1993 to June 1994, and July 1994 to June 1996 respectively. Over this six and a half year period Sida has contributed SEK29.5m to IIEP, equivalent to about US\$4.4m..

Table X11 Sida Contributions to IIEP 1969 to 1996 (in millions)

Contribution Number	Period of Operation		Total		Average Annual	
	Date	Number of months	SEK	US\$	SEK	US\$
1	Jan 1969 - Dec 1973	48	4.0	?	0.8	?
2	Jan 1974 - Dec 1978?	60	?	1.37	?	0.27
3	Jan 1979? - Dec 1981	36	?	1.29	?	0.43
4	Jan 1982 - Dec 1986	60	12.0	1.81	2.4	0.36
5	Jan 1987 - Dec 1989	36	9.0	1.45	3.0	0.48
6	Jan 1990 - Dec 1992	36	13.0	2.21	4.3	0.74
7	Jan 1993 - June 1994	18	7.5	0.98	5.0	0.62
8	July 1994 - June 1996	24	9.0	1.25*	4.5	0.63*
8 extension	July 1996 - Dec 1996	6	1.5	0.23+	3.0	0.46+

* estimate; + estimated at current rate of US\$1 = SEK6.60 SEK = Swedish Kronor.

Varying rates to US\$. Amounts shown are US\$ amounts actually received in the periods from 1982. Between 1990 and 1996 the US dollar has been worth between 5.5 kronor and around 8 kronor at different times. In September 1996 the official UN rate of exchange was US\$1 = SEK6.60.

Note: In 1997 Sweden's financial year is to move from a July-June base to a calendar year base. The twelve-month financial year from 1 July 1995 to 30 June 1996 has therefore been extended to 31 December 1996, an eighteen-month budgetary period. In the circumstances a six-month extension was made, at a lower annual rate, to Sida's voluntary contribution to IIEP to cover the period from 1 July to 31 December 1996.

As noted earlier, UNESCO covers the basic administrative costs of the Institute, and the Sida

contributions have been concentrated on programme activities, with modest support (about two or three percent of Sida's total contribution) for administrative costs. The contributions have covered a range of activities in the fields of training, research and dissemination. The allocation in percentage terms for these three major thrusts of IIEP's programme in 1990 (sixth agreement), 1993 (seventh agreement) and mid-1994 to mid-1996 (eighth agreement) is shown in Table XIII.

Table XIII Budgeted Sida contributions for components of IIEP programmes as a percentage.

Activity	1990	1993	1994-96
Training			
ATP	47.3	54.8	48.0
Workshops & ITCs	12.6	7.3	16.2
Resident Research Fellows	3.1	6.1	1.2
Preparation of training matl.	-	8.5	-
Total	63.0	76.7	65.4
Research Total	20.9*	8.6	13.3
Dissemination			
Fundamentals series	n.s.	n.s.	5.2
Teaching materials	n.s.	n.s.	3.1
Total	7.7	7.3	8.3
Institutional Development/Training of Trainers			
Training of trainers for institutional development	6.1	-	4.0
Distance education: ditto	-	-	6.4
Strengthening co-operation with training institutions in developing countries	-	6.1	-
Total	6.1	6.1	10.4
Administration	2.3	1.3	2.6
Grand Total	100.0	100.0	100.0

n.s. = not specified * Included here is an item for the collection of key indicator data in basic education, estimated at US\$4,000 out of the total budget of US\$65,000 (6.3%). This was classified separately in the agreement: above, however, it is allocated to 'research'.

This table indicates a fairly constant commitment on the part of Sida to the IIEP's key functions of training, research and dissemination. The Annual Training Programme has absorbed roughly half the total funds, and training overall has accounted for about two thirds of the allocation (more in each case in 1993). Workshops and intensive training courses have become relatively more important to Sida and the Resident Research Fellows' programme, less. Institutional development and the training of trainers is attracting increasing emphasis.

Appendices 8, 9 and 10 to this report reproduces the three agreements about the programme

content that Sida's contribution would support.

All three agreements laid great store by strengthening institutional capacities in developing countries through training (especially the training of trainers) research and dissemination. The **sixth** agreement, 1990 to 1992, initiated around the time of the Jomtien World Conference on Education for All, also laid special emphasis in the research programmes on extending the coverage and improving the quality of education for all. The **seventh** agreement, January 1993 to June 1994, highlighted the restructuring of the annual training programme to make it more accessible to participants from developing countries and also emphasised strengthening of training institutions in developing countries through staff development and materials development. The text of the **eighth** agreement, mid-1994 to mid-1996, while stressing the need to sustain the Annual Training Programme in Paris and to consolidate the innovations made, appears to reflect a growing preoccupation on the part of Sida with development of indigenous infrastructures by providing more support for intensive training courses and workshops in less developed countries; and by developing institutions in the countries of 'the South' in various ways, including use of the training and research programme to that end.

Exploration of the extent to which such intentions have been realised provides much of the focus for this report.

4.2.2 Modalities of Sida's Support for IIEP

New agreements follow a review, in a joint meeting between Sida and IIEP, of performance under the previous agreement and consideration of IIEP's forward work plans. The conditions for the new agreement are the subject of an exchange of letters between Sida and the Director of IIEP. Attached to the more recent agreements is a schedule of IIEP programme activities to be funded out of the Sida grant, a schedule which can only be amended with the consent of Sida. Under the eighth agreement signed in 1994 the purposes for which the Sida grant could be used, previously rather widely drawn, were specified more narrowly. An annual financial report, detailing the use of Sida funding, is prepared for the Agency by IIEP; the published annual reports of IIEP and the Director's report to the Governing Board provide the appropriate general narrative account of IIEP's progress. In some instances a special terminal report on the use of funds over the whole agreement period has also been requested by Sida; the consultants undertaking the present evaluation were given those for the fourth and seventh agreements.

Discussions are held bi-annually in most years, in Stockholm and in Paris, to review progress under the agreement and to discuss matters of common concern.

Although Sida does not require that its contributions to IIEP be confined to programmes in countries which are the recipients of Swedish bilateral education sector support, there is a natural tendency for Sida to prefer to support those IIEP programmes which are in areas of the world where it is itself active on the bilateral front. There is also some congruence between the focus of Sida's support for IIEP and the policies for educational development it is itself pursuing, as recently promulgated in its 1996 policy paper on Co-operation in Basic Education and Education Reform. (See Appendix 11 for a summary of this paper.)

Sweden's voluntary contribution to IIEP is funded through Sida's 'Special Programmes' budget

head, sub-head 'Experimental work and methodological development'. IIEP must compete with other uses for this money. In fact, at a time when Sida's budget has come under increasing strain, the share of IIEP in the Special Programmes budget has been rising, even though the total amount received by IIEP has not increased in the same way. Table XIV below shows planned expenditure under this sub-head for Sweden's financial year from July 1994 to June 1995 and for the 18-month period July 1995 to December 1996.

Table XIV Sida Education Division's Planned Expenditure on Experimental Work and Methods Development (in SEK '000)

	Jan 1994 - June 1995	July 1995 - Dec. 1996
International Institute for Educational Planning	4,500	6,000
Other UNESCO Programmes		
Education Statistics	3,000	3,500
Education for All Forum	750	550
Social issues project (did not materialise)	1,500	
AIDS Education*	2,400	1,000
Total	7,650	5,050
Association for Development of African Education (DAE) Working Groups	600	600
Southern Education Research Initiative		525
Other planned programmes	6,150	5,828
GRAND TOTAL	18,900	18,003

* On Health Division budget.

In addition to Sida's mainstream support for the Institute through voluntary contributions under the successive agreements, the country assistance budgets of Sida have funded fellowships for trainees on the Annual Training Programme. In the period 1990 to 1996, Sida's country programmes paid for a total of 22 fellowships at IIEP: and in addition Sida funds have also supported visiting trainees enrolling for shorter periods in the streams and modules of the ATP in the last two years.

The Institute has three other possibilities of drawing money from Sida. The first is by obtaining a share of the Funds-in-Trust granted by Sida to UNESCO, which would then have to give IIEP some priority among its requests to Sida if the Institute is to benefit in this way. The second is through the occasional funding of an associate expert to serve as a member of the IIEP staff. This device has been employed by Sida in the past, but it has not been used in the 1990s. A third possible channel is where IIEP undertakes contractual work financed by Sida: between 1990 and 1995 IIEP earned US\$90 000 through services performed directly for Sida. These included a research project on literacy in Tanzania, an educational planning programme for Namibia, a seminar in Mozambique and a seminar on the impact of HIV/AIDS in Education.

Voluntary contributions to IIEP are managed by the Education Division of Sida which has 15 staff (including 12 professional specialists in education). It is one of six divisions making up

the Department of Democracy and Social Development, which itself has a staff of 70 to 75 people. The other professional divisions in the Department are concerned with culture and media, democracy and human rights, health, and public administration: there is also an administrative unit. The Department of Democracy and Social Development is one of five sector departments in Sida, and there are a further five 'regional secretariats' which deal with country programmes of bilateral aid. On request, the Education Division gives advice about the education dimensions of development proposals to the regional secretariats.

4.2.3 Sida's Policy on Co-operation in Basic Education and Educational Reform, 1996

Sida's new policy statement (summarised at Appendix 11) makes it clear that education support is the cornerstone of Sida's overall objective of poverty reduction through development co-operation. The policy on support for education is guided by this overall objective and by the World Declaration on Education for All issued at Jomtien in 1990. Particular attention is therefore paid to equity issues and the needs of girls and women, groups which are socially or geographically marginalised, and those with special education needs. The policy takes account of recent challenges and negative trends for education in developing countries, including economic austerity, the move towards a global culture which encroaches on education's traditional roles of socialisation into the national culture and values, changing perceptions of the proper role of the state, developments in labour markets, and population growth and urbanisation.

Arising out of this, Sida has identified two main priorities for its education co-operation policy. These are support for education reform and support for basic education, the focus of this policy paper. (Other policy statements are in preparation on, for example, support for higher education and for research). In both of these a high profile will be given to the basic education needs of groups of people previously neglected by their own societies.

4.2.3.1 Support to reform processes

Sida intends to focus on three areas. The first is policy reform where Sida will support policy development processes including research and other analytical work. There will be particular emphasis on pedagogical reforms for quality improvement through programmes bearing directly on the teaching-learning process (e.g. teacher education, locally relevant education materials, curriculum development, language issues, school management). The second is reform of financing of education: here Sida is willing to finance external assistance for analysis and reform: its own position is that there is no alternative to the state retaining the main responsibility for financing of basic education. The third area is development of the institutional framework for educational reform, where Sida has a particular interest in exploring the potential of decentralisation and community involvement.

4.2.3.2 Support to basic education.

This level of education is the main priority area for Sida; even though Sweden also gives some support to further and higher education because of its important role in advancing basic education and its importance in the context of institutional development, technological development and research. Of the two main concerns for basic education, quality and access, Sida gives priority to quality. The two principal strategies in support of basic education development are qualitative improvement through e.g. teacher training and provision of appropriate materials, and help for under-privileged groups.

Education planning, management, research and evaluation is named as one of ten main areas for Sida support to basic education. The policy document states:

The objective of Sida's support to education planning and the related fields of management, research and evaluation, is to develop institutional capacity at all levels of the system. The support is not an end in itself but is part of a strategy to improve the quality of basic education, to improve access and to facilitate education reform processes. Sida has therefore supported education planning and management both in the framework of specific education sector agreements at country level, and also through support to training and research by international organisations such as UNESCO's International Institute for Educational Planning.....The concept of education planning has been widened in recent years, reflecting a growing recognition that there are many actors, at various levels of the system, participating in the planning and management processes.

Sida's strategy is to strengthen institutional capacity for educational planning and management through competence development. Special programmes are necessary for building up capacity, for example in utilizing computer based management systems and in the collection, analysis and presentation of education statistics so that permanent information systems can provide timely and relevant data to planners and decision makers. At the same time managers need to learn how to use resources effectively.

PART C. ASSESSMENT

CHAPTER 5

PERFORMANCE UNDER THE SEVENTH AND EIGHTH AGREEMENTS

5.1 Introduction

Our terms of reference require us to report on, *inter alia*, 'the extent to which the objectives established for the different sub-components of the programme (of Sida-IIEP co-operation) have been achieved'. We confine ourselves to Sida's voluntary contributions under successive agreements and omit IIEP's contractual work for Sida.

The three agreements covering the period of this evaluation, 1990 to 1996, are the Sixth Agreement running from January 1990 to December 1992, the Seventh Agreement from January 1993 to June 1994, and the Eighth Agreement from July 1994 to June 1996. Successive agreements specify in ever more detail the purposes for which Sida funds shall be expended. Because there is so much more specificity in the last two agreements, and because the period they cover (1993 to 1996) is more recent and relevant to the current situation, the consultants have concentrated their analysis on the Seventh and Eighth Agreements.

5.2 The Seventh Agreement: January 1993 to June 1994.

Sida pledged SEK 7.5m., almost \$US1m., for this eighteen-month period. In June 1994 the Institute prepared a report for Sida on the 'Training, Research and Dissemination Activities of IIEP (January 1993 - June 1994)'. The consultants have seen only the 20-page draft of this document, without annexes, and the following analysis is based largely on that report, complemented by reference to the Institute's published annual reports for 1993 and 1994. The report to Sida consists mainly (the first fifteen pages) of relevant material taken directly from the text of the 1993 Annual Report plus material which, with modification, later appeared in the 1994 Annual Report. The final five pages are more 'tailor-made', and describe some of the activities on which the Sida grant was spent, but without providing any analysis of the extent to which the objectives specified in the 1993 agreement had actually been carried out.

This brief assessment is necessarily somewhat cursory. It has been written on the basis of a comparison of the original agreement with what IIEP itself reported at the end of the period. But it is produced without benefit of sight of IIEP's forward plan of activities for each of the years (1993 and 1994) ahead, whose submission to Sida the agreement stipulates. This may not matter so much in the particular case where the agreement lasted only eighteen months, since the annual forward plans would then closely reflect the agreement signed a few months before. But we are conscious that unforeseen resource constraints (Sida money is normally mixed with that from other donors) and shifting priorities of member states expressed through UNESCO forums, do sometimes necessitate 'mid-stream' adjustments to IIEP's work. Only Sida and IIEP will know the extent to which any departures from the objectives set by the agreement were with the concurrence of both organisations.

Sida and IIEP agreed (Article 2) that 'the priority subjects to be covered by this agreement are those in the attached appendix forming an integral part of the agreement'. We have therefore organised the material which follows under the headings in the appendix to this agreement:

5.2.1 Training

The set objectives appear to have been largely met. Sida support enabled IIEP to cover its share of the training costs of 26 participants on the ATP. The reformed flexible structure of ATP with streams and modules took root, and new modules were introduced to the ATP on diagnostic techniques and sector analysis, and on textbook production and distribution. Over three quarters of Sida support in 1993 was classified as training (see Table XIII).

5.2.2 Training of trainers

The text of the Agreement assigns this high priority with emphasis on training of the staff of partner national institutions, development of training materials to be used by training institutions, and involvement of national institutes' staff as a resource in IIEP training programmes. This stated priority is not fully reflected in the financial allocations, however: only 6% of the Sida contribution was for training of trainers (Table XIII). There were eight partner institutions in developing countries at the start of the period to which these clauses might apply, and 15 at the end, though IIEP collaborated with others even where no formal agreement existed. No mention is made of any co-operation with three of the original eight (in Korea, Madagascar and Mozambique) in the 18-month period. Reported co-operation with Zimbabwe seems to have been confined to participation by one staff member in a two-week IIEP sub-regional course. For one of the second wave of seven institutions there was also no reported activity. However five of the 15 (and two other non-agreement institutions) hosted IIEP intensive training courses or seminars (out of 19 such IIEP events world-wide during the 18-month period). IIEP assisted with the preparation and implementation of a course at another. Apart from the five cases of institutional hosting, there were reports of seven individuals from the 15 institutions attending short courses or modules, one staff member from Morocco co-operating in an IIEP research project, and of a Residential Fellow at IIEP from the Indian partner.

This record, particularly of staff training, seems to us hardly to reflect the priority the agreement gives to institutional development. IIEP reported to Sida in June 1994, however, that a review was under way on the basis of which it would 'propose to the participating institutions the use of appropriately adapted training materials developed by the Institute, the establishment of a network linking documentation centres of the institutes associated with IIEP, as well as - should resources become available - the adoption of a plan of co-operation'. No mention of this review, or of the foreseen activities, was made in either the 1994 or 1995 reports of the Institute, however.

5.2.3 Specialised training courses

IIEP conducted training courses in three of the areas foreseen; but in the fourth, 'methods of budgeting', had not yet introduced a course at the end of the period (the first course appears to have taken place in June 1996, following some research workshops in January and June 1995).

5.2.4 Resident Fellows

The agreement provided for continuing the programme on the same limited scale as before. Four Resident Fellows (apart from those attached to the Association for the Development of African Education) were then in post. In 1993 three completed their tenure and one, from NIEPA (a partner institution) joined. In the first half of 1994 two new Resident Fellows joined and one completed, leaving three in post in June 1994.

5.2.5 Training materials

The agreement specified that new training materials would be elaborated in four areas: management of higher education, budgeting techniques, utilisation of information, and crucial issues in teacher management. Those in the first area appear to have been produced and tested. The report refers to delays in producing ones on budgeting. Any progress in the last two areas is not mentioned.

5.2.6 Research and studies

Four lines of development were foreseen in the agreement:

(i) Continuation of the research focus on the five themes of: basic education, human resource development, financing strategies/mechanisms, organisation and management, and comparative experiences in educational planning. More emphasis on issues of staff management, budgetary techniques and information management.

(ii) Finalisation or consolidation of on-going activities through development of training materials, organisation of research workshops and dissemination of results through publications, seminars and forums.

(iii) Research and studies to help countries monitor the progress and conditions of education.

(iv) Funds permitting, research and studies in the areas of gender education, distance education and the issue of exclusion of youth.

In its longer general section IIEP's report to Sida consists basically of a description, but lacking any performance audit, of ongoing research on the five themes (or rather four, because finance and administration are combined in IIEP's Report) mentioned under (i) above. Nothing is said about items (ii), (iii) and (iv) except that in the final 'tailor-made' section of the report on IIEP-Sida co-operation a full account is made of research under 'basic education', from which it is clear that many of Sida's concerns and interests under (iii) above were indeed being addressed. However the annual Report of Activities does give detail of the status of the various research projects.

5.2.7 Depository libraries and documentation centres

The agreement refers to the establishment of the network of depository libraries and expresses the hope that the initiative would develop into an interactive network involved in the exchange of data. The report to IIEP recorded that 50 depository libraries had been established in 1993 and 100 more would be added in 1994. IIEP's end-year published report for 1994 gives a figure of 160 libraries designated as IIEP depository libraries.

5.2.8 Forums and meetings.

The agreement describes their role but does not set any target.

5.2.9 Fundamentals of Educational Planning series.

The agreement foresaw development and diversification of the series. The report noted that six new titles had appeared.

5.2.10 Administration.

Sida allocated a small amount. The agreement links this allocation to IIEP staff development activities, materials production facilities and the Documentation Centre.

5.3 The Eighth Agreement, July 1994 to June 1996

This agreement, running for a two-year period, provided for Sida support of SEK 9m (US\$1.25m.) over the two-year period. It laid down objectives in a much more explicit form (see Appendix 10). The consultants have extracted from this the various objectives specified, cross-referenced to the text, and have recorded against each the progress registered. Table XV presents the information available to the consultants in respect of the eighth agreement.

Table XV Attainment of Specific Objectives: Sida-IIEP agreement (July 1994 - June 1996)

Para. Number	Specific Objective	Outcome during specified period (unless stated).
II 1 (i)	60-70 full time members of the 1994/95 and the 1995/96 ATP sessions	1994/95 - 35 trainees 1995/96 - 39 trainees Total of 74 over the two years
II 1 (i)	At least 50% to be from Africa	1994/95 - 18 African trainees 1995/96 - 19 African trainees Total of 37 (50%) over the two years
II 1 (ii)	About 30 Visiting Trainees over period	1994 - 16 Visiting Trainees 1995 - 27 Visiting Trainees Total of 43 over the two years
II 2	To develop clearer interaction between the 'Basic Education' and 'Education for Development' streams	Detailed planning & time-tabling allow students to attend important sessions in other stream - e.g. 'Quality of education: definitions & determining factors'. Also more common elements.
II 2	Further improvements in the strengthening of training elements in 'Educational Management and Administration'	Case studies from recent research ('Management of HE Institutions' & 'Management of teachers') included, now as full specialised modules.
II 2	Further improvements in the use of computers in diagnosis and forecasting	Full modules on information systems introduced. All participants now work on their own PC.
II 2	Further improvements in the standardisation of the didactic materials	Standardisation going ahead as a first step to designing self-learning material. 80% remain unchanged for 2 to 3 years - but additions allowed.
III 1	To train 230 planning and administration staff in short courses	654 people went to ITCs in period. Not clear how many in category mentioned.

III 2	Half of the ITCs to take place in Africa	Initially, about 12 courses to be held internationally (for 230 participants), about 6 to be in Africa. In fact, 32 held internationally, of which 11 held in Africa.
III 2 (i)	Up-date the content and methods of ITC courses	Updated content & methods of following courses: 'Design of educational development projects'; 'Institutional management in HE'; and 'Computer-based techniques for planning the quality of education.'
III 2 (i)	Organize ITCs in sub-regions & countries which have not yet benefited from them	ITC held in following countries for the first time: Eritrea, Namibia, Brunei Darussalam, Nepal, Cuba, Paraguay, Russia, Palestine and Thailand (for Indochinese countries)
III 2 (ii)	Pursue the testing, validation and development of new courses based on IIEP's on-going research	See above under III 2 (i) - as well as 'Financing & management of technical education and vocational training'; and 'Utilization, deployment and management of teachers.'
IV 2	Applied research in decentralized mechanisms for the management of school quality	Research in countries in Asia and Africa has resulted in ITCs and the production of country case studies
IV 2	Applied research in the financing of secondary education after Jomtien	Research commenced in Africa and Asia with analysis of countries having relevant experience
IV 2	Research forum on planning the provision of science education in secondary schools	Policy forum held in South Africa, August 1995
V IO 1	Level of requests from partner training institutions	Many requests from some (e.g. NIEPA, INNOTECH, Mozambique) and fewer from others
V IO 2	Workshop to gather training institutions having partnership agreements with IIEP around topic of common concern	None held of all partner institutes. Strategy to get partners in one region together, e.g. ANTRIEP with 13 members of which 2 are partners out of 6 possible Asian partners
V 2 (i)	Small teams of partnership institution trainers to be invited to range of courses	15 trainers (3 from partner institutions) have participated as VTs in ATP modules in last 4 years. Also attended, e.g., ITC in Kathmandu, Dec 1994 and others

V 2 (i)	Developing specialised module for training of trainers	Still under discussion
V 2 (i)	Dissemination of training material to training institutions	Following available (end 1994): 'Follow-up & tracer studies'; 'Planning the development of school textbooks'; and 'Partnership & participation in basic education.' Also, depository libraries often located in training institutions
V 2 (i)	Partnership institution trainers to be involved in operational activities (such as development projects)	Joint evaluation & analysis of Lok Jumbish project, India with NIEPA; ITC in Cuba with University of Costa Rica resulted in locally run training courses; Mauritius Institute of Education (not a partner) involved in IIEP training contract in Mauritius
V 2 (ii)	Dissemination of distance education material to partnership institutions	Materials dispatched to all partnership institutions
V 2 (ii)	Possible representation in book form of material on 'Planning the Development of Textbooks'	240 page book by E.Brunswic & J.Valérien: 'Textbooks for all: ensuring their sustainable development'. End of 1996
V 2 (iii)	Preparation and testing of new material on microplanning	Still under preparation
V 2 (iii)	Preparation and testing of new material on human resource planning	Part already published ("Follow up and tracer studies")
V 2 (iii)	Preparation and testing of new material on budgeting management	Still under preparation: expected completion dates - first half of 1997
V 2 (iii)	Preparation and testing of new material on institutional management of Higher Education	To be published by end of 1996
V 2 (iii)	Continued production of 'Fundamentals of Educational Planning'	4 new titles published in 1994 & 1995 2 new titles published in 1996

Note 1: Paragraph references are to the Annexure: *Programme of co-operation between the Swedish International Development Authority and the International Institute for Educational Planning (period July 1994 - June 1996)* attached to the letter of Mr. Kjell Nystrom (Head,

Education Division, SIDA to the Director of IIEP) dated 1 September 1994 setting out the terms of the agreement between SIDA and IIEP.

Note 2: On page 4 of the above Annexure, the section 'Institutional Development' is marked as section IV. As the previous section is also marked the same, this is clearly a typographical error. In the paragraph references above, this section is denoted as 'V'.

The broad conclusion from our review of performance under the last two agreements is that in most areas the objectives have been met, with a few exceptions (such as the proportionate share of ITCs in Africa in the latest period). The one major exception would appear to be in the training of trainers/ institution-building area where the problems appear more intractable. Some of the reasons will be explored further in the section of the report dealing with that subject. There would also appear to be a tendency, true of many institutions besides IIEP, for an over-optimistic view to be taken of production and publication dates for research studies and written materials. A number of these have evidently lagged behind schedule.

An area of uncertainty is the precise status of the appendices/attachments to each of the last three agreements. We were informed by Sida that the appendices are an integral part of the main agreement. Each appendix contains a statement of objectives - in greater detail in each succeeding agreement. Since, however, actual release of Sida funds takes place on the basis of exchanges of letters detailing specific activities to be financed from the Sida contribution, the question arises as to whether the objectives set out in the appendices represent actual undertakings by IIEP, whose fulfilment is a condition of Sida release of funds, or no more than an indication to Sida of what IIEP intends to use its best endeavours to achieve. If the former is the case, then there should surely be a more rigorous framework of reporting than was used in 1994, when IIEP's report to Sida on activities under the Seventh Agreement put a rather loose construction, possibly with Sida's agreement, on the recipient's reporting obligations. The consultants suggest that in future there should be a tighter reporting framework in relation to any specific objectives in the agreements or in the exchange of letters. However, the requirements should be kept simple, something that is eminently possible in view of the regular meetings between Sida and IIEP staff. A basic reporting form, similar to our own chart on performance under the Eighth Agreement (Table XV above), together with the financial report already provided and the printed annual 'Report of Activities for 199....', should suffice.

CHAPTER 6

THE ANNUAL TRAINING PROGRAMME

6.1 Introduction

The ATP is regarded as the Institute's 'flagship' training programme. It provides training for individuals from ministries and training institutions in their home countries and is the basis of a network of senior officials and academics familiar with the work of IIEP. It has been described in section 3.1.4.1.1.

6.2 Sida funding agreements

In the three agreements between Sida and the IIEP in the 1990s, the ATP has been specified as the major recipient of Swedish funds. Approximately half of Sida's total contribution has been earmarked for this programme. In addition, Sida has provided fellowships to 22 students in five of the courses from 1989/90 to 1995/96 from its country programmes.

The 1990-1992 agreement was the first that contained specified priorities for the use of Sida funds. It stated that 'particular priority is attached to the IIEP Annual Training Programme'. This emphasis is repeated in the 1993-June 1994 agreement, laying stress on the 'enhancement of the participants' skills in diagnosis and policy analysis, administration and management'. In addition, that agreement records the new emphasis on the training of trainers but does not directly relate it to the ATP. In the July 1994-June 1996 agreement (the eighth), it is again designated the major activity of interest to Sida, but it notes that the ATP is to be expanded to allow visiting trainees to be able to attend certain modules as needed. The ATP, it was said, 'addresses itself to officials working at central or regional levels in their home countries'.

6.3 Previous evaluations

A number of evaluations and tracer studies of the ATP have been undertaken. They were in 1985 and 1986 (internally administered tracer study) and the present tracer study, for which the questionnaire was agreed with the Sida consultants and administered and analysed by IIEP. In addition there have been regular evaluations in the form of questionnaires administered to trainees and analysed by IIEP staff at the end of each course. The 1992 Report of Activities notes that an external evaluation report was made on the course by a consultant to the IIEP who had been a trainer on the course. We now learn that this was in fact commissioned by IIEP to be an internal study to guide the Institute's work in shaping future ATP course. It was been made available to us but without permission to quote it.

6.3.1 1986 Tracer Study

Twelve to fifteen months after their respective graduation dates, trainees from the 1983/84 and the 1984/85 cohorts were followed up and a report was issued in November 1986. The overall response rate was 77%. The main conclusion was that on return home, most of the trainees had remained in the same field of activity. In fact, 40 out of the 73 who replied were educational planners before the courses, and 48 at the time of the trace. In contrast, the number describing themselves as educational administrators had dropped from 14 to nine. Forty two out of 67 responses judged the course to have been of considerable importance in their career progression - even within only a year. A high proportion (over two thirds) said that the course had been of practical benefit and each gave an example of an innovation which

had been introduced as a result. However a number of former trainees raised what the report called the 'eternal problem' that at the end of the course, they received a certificate of attendance rather than an academic qualification. Finally, nearly half of the returned trainees saw the lack of qualified professional staff as the most serious problem facing their department.

6.3.2 End-of-course evaluations, 1989/90 to 1995/96

The evaluations covered are from the 1989/90 to the 1995/96 courses inclusive apart from the 1992/93 course, the results of which could not be made available to us.

The responses showed a consistent pattern over the six-year period. The individual courses and modules were seen as useful or very useful by the overwhelming majority. The study visits were particularly well received. The same is true of the teaching methods: role-playing was the least well perceived and it seems to have been dropped in 1995/96. All felt that they had had sufficient contact with their supervisors despite occasional absences abroad on mission. Although most trainees felt that the time available for the various activities was sufficient, there was a significant and consistent minority who disagreed.

The trainees were on the whole very positive about the facilities. The main gap repeatedly identified was the shortage of material available in the Documentation Centre on the trainees' home country. To address this problem, it was suggested that trainees should donate relevant material from their own country to the Documentation Centre.

In the final general assessment, the trainees were asked to rank the importance of the four main objectives of the ATP and to say how well these objectives had been achieved. The great majority gave the objectives the top ranking of 'Very important'. The extent of achievement of these objectives was given a second ranking of 'Well' by the majority of respondents, although a significant minority gave the top ranking of 'Very well'.

6.3.3 1996 Tracer Study for the 1989/90 to 1994/95 courses

The 1996 tracer study essentially represents a replication of the study done in the mid 1980s. Indeed parts of the questionnaire were modelled both on the earlier one and on the end-of-course evaluations. The responses to this study and to the end of course study will be directly comparable as the respondents and the courses are the same, though not surprisingly the response rate for the end-of-course evaluation is far higher.

The basis of the study has been described above. 234 out of 240 trainees who completed the first six courses this decade were sent a questionnaire (which is reproduced in Appendix 6) with a covering letter from the Director of IIEP requesting them to complete the form and return it to IIEP. In order to assist those where postage might be a problem, the possibility of returning via the local UNDP office was offered. Of the six not sent, one African from the 1994/95 course had died and no address was available for the other five. The rest were sent to the last known address.

By 8th. September, 111 questionnaires had been returned and were used for the analysis prepared for the IIEP. This represents a 47% return rate. Further forms have continued to trickle in but were too late to be taken into account in the analysis which follows.

6.3.3.1 The structure and representativeness of the returned sample

The composition of the respondents as compared with the whole group is given in the Tables XVI - XIX below. (The person who died has been deleted from the whole group, but not the other five whose addresses were missing.)

Table XVI Gender breakdown of sample

Gender	Original Group		Respondents	
	Number	%	Number	%
Male	170	71	83	75
Female	69	29	28	25
Total	239	100	111	100

Table XVII Breakdown by year of training

ATP year	Number sent	Number replied	% replied	% of respondents (111)
1989/90	49	17	35	15
1990/91	42	20	48	18
1991/92	39	17	44	15
1992/93	41	20	49	18
1993/94	34	20	59	18
1994/95	34	17	50	15
Total	239	111		100

Table XVIII Breakdown by region

Region	Number replied	% of total sample	Number sent	% replied
Africa	65	59	129	50
Arab States	9	8	18	50
Asia & Pacific	18	16	50	36
Latin America & Caribbean	9	8	25	36
Europe	10	9	17	59
Total	111	100	239	

Table XIX Breakdown by category of Sida programme countries

Sida partner countries	Number replied	% of total sample	Number sent	% replied
All action programme countries	37	33	69	54
Education programme countries	23	21	48	48
Case-study countries	11	10	14	79

A 47% overall return rate is adequate. The crucial question is whether respondents are representative of the whole group. Some impression can be gained from the tables above, in comparing the gender, area and regional breakdowns of the original group with those who replied. Ideally, the education and employment structure of the original group and those who have replied should also be compared to check the representative nature of those who have replied. This may be possible if information from the application forms can be added at a later stage along with the late replies.

From the above, the gender ratio is within 4% of the original. The return rate from the most recent courses is a little higher than the earliest course and there is some significant variation by region. The only other significant variation is the very high return rate from the case-study countries (which is hardly surprising in view of the attention given to this group by the consultants). However this group is too small to significantly distort the results. It would seem that the sample of those who returned the questionnaires can be taken as reasonably representative of the whole group.

6.3.3.2 What area of work do the respondents come from and where are they now?

Of those who responded, 71% came from ministries of education (one tenth of them from regional administrations) before joining the ATP, 5% from other ministries (including planning ministries), 22% from educational establishments (of which just over half were for training for the education sector itself) and 1% from international institutions.

The actual jobs done by the former students before joining the ATP were as follows:

- * 76% were in educational planning (including 49% of the whole sample actually planning education or in the statistical branch with the next largest group being teachers and researchers in educational planning) ;
- * 14% were in educational management (including 9% of the whole sample in college administration);
- * 6% were in other activities related to educational planning; and
- * 4% were in detailed planning of educational programmes.

The overwhelming majority of those who joined the ATP were thus very firmly connected to educational planning or management in a fairly narrow range of activities.

The tracer study was concerned to explore, in three main areas, the experience and views of the former trainees since they had completed their studies:

- * The effect of the training on their professional activities;
- * The effect (if any) their time at IIEP has had on their employment since completion, including their present position;
- * What, in retrospect, they think about their studies.

In addition, the questionnaire explored their continuing contact with the Institute. This aspect is mentioned Chapter 10 on Publications and Dissemination.

6.3.3.3 The effect of the training on their professional activities

Most (74%) of the trainees had no particular difficulties on return home. Interestingly (and maybe not surprisingly), only 13% of the 1989/90 and 1990/91 graduates say they experienced difficulties, as against 27% of the 1991/92 and 1992/93 graduates and 35% of the 1993/94 and 1994/95 graduates. This may be the fading of memory of bad experiences or it may be that the earlier graduates had put their initial problems on returning home into the perspective of subsequent experience. It could, also, be because planning jobs were mostly becoming full by the beginning of the period. The problems faced by the 26 people experiencing them included difficulties in introducing new ideas into conservative structures (10), problems with colleagues, including superiors (5) and difficulties with getting a post (3). This type of experience on returning home is not untypical of the problems which face by a minority of students who have been on courses overseas and has been a matter of international research. Attempts are being made, for example in Britain, to prepare completing students to deal with some of these issues.

The former trainees were asked their views about the effect of the course on their professional expertise, performance and career development. The following levels of responses were given in answer to the question: 'Do you believe that your participation in the IIEP Annual Training programme *has had* any effect on your ...':

Table XX Effect on professional position

	Yes, to some extent %	Yes, very much %	All 'Yes' %
Professional competence?	17	80	97
Professional recognition/esteem?	31	59	90
Career progress	19	39	58

The rankings did not vary markedly between respondents from the different continents or between the different groups of Sida supported countries. There was a small but consistently lower ranking given by female respondents who were all more pessimistic in answer to the three questions.

However there were two other interesting points of variation. Firstly, respondents working for the same employer had quite different perceptions with regard to their career progression. There can be a wide range of reasons for this - it may be that the perceptions of the individual respondents are unreliable, that the policies vary in an organisation (possibly depending on the

section policy or even the individual's superior) or for some other reason. Secondly, those who had changed their position were far more positive about the effect of the course on career moves than those who had not had a move. The analysis report of the tracer study notes that there was no precise definition of what 'career progress' meant.

The former students were asked what they thought would be the effect of the course in two years time. Apart from a comparatively large group which did not answer this question (20%), there was less certainty that the effects would continue to be positive.

Finally, 96% of respondents affirmed that the training had been useful and 88% said that they had tried to recommend an IIEP idea or concept and gave a great variety of examples.

6.3.3.4 Effect on their professional careers

There has been evidence of both change and continuity. Thus only 24% of the respondents were still in the same jobs when they completed the questionnaire as they when they filled the end-of-course evaluation on completion of their studies. Taking the other three quarters, nearly half of all the respondents (45%) changed their job between June and December of the year they completed, 12% changed the next year and 19% after that.

Despite this, only 23% actually changed employer. The others moved within the same organisation. This is indicated in Table XXI below:

Table XXI Past and present employers

Employing organisation	Before ATP %	Present %
Education ministry		
ministry	64	58
regional administration	7	4
Teaching establishment		
educational staff training	12	8
University, HE, etc.	10	9
Other ministries	5	9
International institutes		
Bilateral projects	1	2
UN, Comm. Sec., etc.	0	8
Others	0	4

Notes: Comm. Sec. = Commonwealth Secretariat; UN=UNICEF and UNESCO

This indicates a considerable degree of stability, with the education ministries remaining by far the largest employer. Despite this, it is significant that the biggest gains (from a base of zero) are the big international organisations. Only 4% are now working outside of the normal education structures though the study also shows that only one person is not now working in education at all.

Of equal importance is the sphere of work - what the respondents are actually doing. Again the pattern is one of fairly small change. Three quarters did not change their sector of activity

and, within that, 58% of all respondents did not change the type of sphere of their work. There has been movement to and from the educational planning sector. Thus 14% of people left but 8% joined the sector. Of the 14% who left (15 people), 11 people rejoined the educational management field. The overall position is given in Table XXII:

Table XXII Change in jobs before and after training

Sphere of activity	Before ATP %	Present %
Educational Planning	76	70
Educational planning, production of statistics	49	42
Teacher/researcher in educational planning	11	8
Research and evaluation	8	8
International cooperation	5	13
Other	3	0
Educational Management	14	19
Administration (a service or college)	9	9
General administration	5	6
Activities connected with educational planning	6	9
Planning in non education sections	3	0
Other educational involvement (full or partly)	4	9
Further studies in educational planning	0	1
Detailed planning of educational programmes	4	1
Not in education	0	1

There is a small, and reducing, number of people who are 'teachers/researchers in educational planning'. Overall, there is a drift away from educational planning to other activities, with less involvement directly in education or the 'control' (planning, management or administration) of it, unlike 1986, when there was a drift to educational planning. However it is not at all marked. Indeed it seems that only one person has left education altogether.

6.3.3.5 What former trainees think of their training at IIEP

The main questions asked were identical to the questions asked at the end of the course evaluations. The former trainees were first asked what they thought about the importance of four general objectives of the ATP and then how well they thought these objectives had been achieved. The results are given in Table XXIII:

Table XXIII Importance of training objectives and extent of achievement

Objectives	Importance compared to professional needs		Extent to which they were achieved	
	Important %	Very important %	Well %	Very well %
Diagnostic methods and techniques	15	80	42	45
Relationship between educational system and socio-economic dev.	26	68	50	35
Educational planning & implementation	23	70	58	23
Planning issues pertinent to trainees country	26	62	44	32

If these responses are compared with the end of course answers to the same questions given in Paris, exactly the same pattern emerges. The Institute has clearly identified the felt needs of the students and has been generally successful in achieving the training objectives. Only about 20% of the students gave a ranking of less than 'well' in the achievement of the training objectives. There were no significant differences between the sexes, the regions and the different Sida groups of countries in the answers to these questions.

The same issue was approached from a different direction. The former students were asked if they thought that some aspects were missing, and if so, to say what. Overall 61% said that there were aspects they would like added, although the percentage was higher for those from the first two courses (1989/90 and 1990/91) and for those from Europe and from Latin America and the Caribbean. The suggestions fell into two groups, The largest (as in 1986) was the suggestion for developing a number of existing subjects. The suggestions including statistics (8%), a special module on human resource planning (7%), the politics of educational planning (6%), etc. 10% of the respondents made suggestions for new areas - two people suggested the development experiences of former communist countries should be explored and a number of individual suggestions includes subjects such as determining the need and demand in education, techniques used in the training of trainers, how to manage change, more emphasis on gender issues, the transfer of technology and the psychology of communications for managers.

As far as the training methods are concerned, 49% were complimentary and 32% made both positive and negative observations. The respondents were answering an open ended question so there were a wide range of comments. Some common points came through. Thus the following were particularly commended: the relevance of the material to the participants (11%), the way in which individual abilities were developed (12%), the methods were participatory (5%), modern (4%), varied (5%) and practical (3%). They approved the pedagogical approach - particularly, again, the practical approach (17%), the group work (6%), the study visits (7%), the exchange of experience and information between participants (9%) and the alternation between theoretical and practical work (4%).

The two main criticisms were the need for more practical work (10%) and the need for more

time for private study (7%). This latter was also registered in the end of course evaluations. There were a variety of criticisms made of lecturers by 8% of the respondents. Interestingly only 5% suggested that there was a need for exam assessment so that those graduating from the course could get an academic diploma.

In general, there were no differences between the different regions. However the Sida supported countries (all three groups) were more complimentary and less critical of the Institute's training.

Although the former students were asked to comment on their general experience in Paris in relation to their accommodation, social life, separation from home, etc., no information has been made available to the consultants about the answers to these questions.

6.3.3.6 Conclusion

Overall, the respondents give a picture of considerable satisfaction with the course. Former students felt that they had gained professionally even if they were not so certain that they got recognition for this immediately. They did not immediately abandon the field when they got back and indeed stayed in it for well the period over for which most had been bonded. The myth that overseas study immediately results in many people going straight into the private sector is simply not true for this group. As is indicated in Chapter 10 on Publications and Dissemination, they also remain in touch with the Institute and with each other to provide a network of people who are abreast with the world of educational planning.

6.4 Assessment of the ATP

This part of the report draws on the documentary material referred to above, on personal interviews held by both consultants with former trainees in the case-study countries, on comments by a range of professionals familiar with the work of the Institute, and members of IIEP staff.

6.4.1 **Where do the trainees come from?**

In the six-year period, 75% of all of the trainees came from government ministries, almost all from ministries of education (both basic and higher) or of human resource development. Thus in terms of professional background, three quarters of the trainees came from the target group specifically identified by the Sida agreement. Another 22% came from training or research institutions including colleges and universities (half of them involved in training for education planning and management), a significantly higher proportion than the 7% who came from the two courses held in the mid 1980s.

Almost all came from the less developed countries which are targeted for support by both IIEP and Sida. Of the 7% who came from Europe, over two thirds came from poorer countries like Turkey or the former Communist countries like Russia, Romania or Albania.

Less satisfactory was the proportion of women able to attend the course. Over the seven courses, 30% of participants were women - and there is only faint evidence of an upward trend during this period - although the 1996/97 course (just outside the review period) has 39% women. As, significantly, the 1986 report did not give a gender breakdown, it is not possible to make a comparison with the position ten years ago. However from the data given

to us for the three case-study countries, it seems that the position is likely to be significantly better than in the past (see section 7.5.2 where a break down is given). The large regional differences in the proportion of women attending indicate that at least part of the problem is with the candidates put forward, which may well reflect the lack of suitably qualified middle-rank candidates employed by the ministries. IIEP has indicated in the Official Announcement each year calling for applicants for the ATP that it gives 'particular consideration' to female candidates. In practice, this has meant giving preference to a female candidate against an equally qualified male candidate. Statistics showing the attendance of men and women have been given in the annual Report of activities since 1992 and the most recent issue of the IIEP Newsletter (July-September 1996 - just outside of the review period) has highlighted the issue. A sustained increase in the number of women will continue to depend on the nominating bodies, but the process will be helped if the Institute gives the issue some prominence - as it is beginning to.

6.4.2 How individual trainees viewed the course

Both at the end of the course and when traced some time later, the trainees were very positive about the experience. The overall evaluation of the ATP, as regards both the aims and the degree to which the Institute was able to live up to them, was the same even after some years.

The trainees who were interviewed all commented on the helpfulness of the staff. In one or two cases, they had been very sympathetically supported when suffering bereavement or confronted with difficult personal problems. The divide between those from Anglophone and Francophone countries, though very real to begin with, was gradually overcome, especially after the study visits. Participants also said, when asked, that they had not suffered any racial discrimination in France. One suggestion made by several people was that French-language training for Anglophones should start as soon as possible after arrival and not some weeks later. In addition, it should not take place at the very end of the day when everyone is tired.

However the issue of accommodation was the one most frequently raised in the interviews. It was felt by almost everyone that IIEP should arrange for all the trainees to be accommodated together. More than one trainee ended up in an expensive room some distance from both IIEP and from where their colleagues were staying. Most trainees have never been to Paris and thus to ask them to make choices in advance of arrival is not realistic. The Indian trainees automatically thought of the NIEPA hostel as the ideal. The problem facing the Institute is trying to meet several, not always compatible, requirements of the trainees: not too far from IIEP, not expensive and where the trainees do not feel isolated. The majority of trainees are placed in hostels, the Cité Universitaire being the most important. An IIEP hostel for all the trainees is neither an economic possibility nor would it necessarily meet the needs of all of the trainees.

All of those interviewed said that they had gained very greatly in professional competence. However there was a wide difference in perceptions about the effect this had on their career progression. Some felt it made no difference at all: others said it had greatly improved their prospects. This was also reflected in the tracer study.

Many of the interviewees did not see the course simply in terms of career progression or of techniques learnt. They felt they had had a broadening experience. The international nature of

the course was seen as crucial. Meeting people from different countries and from different continents with the training in a capital of a major world power was an education in itself. They were able to put their skills and their professional responsibilities in a much wider context.

6.4.3 The benefit to their country's education

In a number of countries, a significant proportion of the staff in the central education planning departments have been on the ATP. Should one then expect educational planning in those countries to show productive results? There are many impediments to such an outcome. The majority of the trainees come from countries which, until the 1980s, made education a priority, but the economic crisis in many of the less developed countries has caused major cut-backs. Moreover it is impossible to separate out IIEP training from other courses. There are many other centres of training in educational planning, mostly in the form of postgraduate studies. Indeed some of those who have been on the ATP have also undertaken high-level academic studies elsewhere. It is thus difficult to give a simple and mechanistic assessment of the impact of IIEP's Annual Training Programme on planning performance in developing countries.

The majority of the trainees said that they had introduced specific changes as a result of their study. Some of those who had not done so said that this was because of the lack of resources or because they could not persuade their superiors to make the necessary changes. It has to be remembered that trainees will be returning to departmental structures which may not be able to adapt to new ideas or to use some of the skills acquired. One former trainee decided very rapidly that it was impossible to be productive in the education ministry, and so left to work freelance (still in education). Another in the provinces said although he was not able to make changes at this stage, he had a far greater understanding of his work and was no longer simply working according to rote.

On the other hand, a case can be cited of a trainee who was immediately promoted from a provincial office to the central Ministry. From there, he had influence on important pieces of research. Yet another was put under great pressure on return to become responsible for a major programme for the upgrading of primary education in the districts. The extra training gained in IIEP on top of two Masters courses enabled the former trainee to cope with this. As was noted in the tracer study, almost all remained in education and the majority with the same employer and the same sphere of work.

Even when a former trainee has influence in his or her professional group, and perhaps even becomes a department head, it may be difficult to affect policy significantly. A former Minister of Education commented that in the Minister's country, the Planning Officers are extremely competent and know what they are doing but they are simply not listened to. What this comment reflects, a point also expressed in many of the interviews with former trainees, is the reality that the top leadership of a Ministry can choose to use or to ignore the professional skills of its staff. Indeed, this can change with time, both positively and negatively, depending on political changes and the appointments made by the Public Service Commission (or its equivalent) in the different countries

Trainees from training and research institutes may have more scope to apply what they have learnt. On the one hand, they increase their knowledge of the various practical techniques used

by professional educational planners. Their contact with the other students who are practitioners from education ministries gives them an understanding of the planning realities in addition to the techniques. On the other hand, they benefit from experiencing the training methods and familiarising themselves with the materials used in Paris. Experiencing new teaching methods is of very great value to former trainees who are themselves now teaching educational administration and planning and can have a long-term multiplier effect through their teaching of other local students. However, as indicated in Chapter 9 below, the consultants do also believe that IIEP should make structured staff development provision for faculty members of training institutions.

6.4.4 Content and Structure of the Course

We were unable to observe the ATP in operation and our information about it is therefore drawn from interviews with IIEP staff and, in case-study countries only, former students; from comments made by professionals having long acquaintance with IIEP; and from documentary sources including the course outlines and materials, the end-course evaluation reports of IIEP trainees and from the tracers study. Necessarily these observations are somewhat impressionistic.

The structure of the course has already been described. The nine months are split between one month of self-study in the home country (which includes time to collect local material), two weeks at the start of the time in Paris for orientation and the diagnosis of student needs, five and half months of 'instructional time' with which to provide the major meat of the course, two and a half weeks in study visits, and five weeks to complete work on the terminal paper, for evaluation and for general completion. There is a two-week Christmas break. All of the elements are designed with the intention that they interlink with each other. It is, however, a very short time to both get basic concepts and skills transferred to the learners and also to provide for the exchange of experiences and the practice of new skills. This is a formidable challenge for any institution, and is not made easier by a clientele very diverse in terms of its previous knowledge, experience and interests, notwithstanding IIEP's careful specification of admission requirements.

The ATP clearly serves an important purpose in opening up horizons for many participants, enabling them to understand the internal dynamics of education systems and their relationship to the wider economic, social and political structures of the societies in which they are located. Most participants come away with a much deeper knowledge of their own education system, having had the opportunity to reflect on it in depth for the first time and, from comparative discussion with colleagues, to gain an appreciation of the range of options and alternatives available for developing their own national education system. The pedagogical approach, giving ample opportunity for students to participate and contribute, to work together in groups and to undertake practical exercises of a technical kind, is much appreciated.

The participants in the programme appear to be generally satisfied with the content, to judge from the end-course evaluations and, more importantly, the tracer study. In the interviews conducted in the three case-study countries, more in depth comments were made. Those who have taken academic courses (diplomas, masters degrees etc.) in universities, as well as the ATP, in many instances comment on the greater usefulness and practicality of the ATP, the content of which is rooted in examples with which they are familiar. Trainees' criticisms are

largely directed to insufficient time for some topics and subjects, and the fact that no academic qualification is gained on successful completion of the course (see the next section). Two participants (in different parts of the world) interviewed for the country case studies felt that the period of optional streams and seminars gave rise to a rather disjointed programme, and some loss of coherence, over those months. Trainees do not otherwise seem to question ATP's basic content and structure. This, and the evidence of continuing strong demand for places might seem to justify the view that no more than marginal modifications in the ATP are required.

The views of trainees and former trainees provide an important and valid perspective, but not the only one. The evolving situation in developing countries requires the ATP to adapt and change further if it is to be fully relevant to new needs and circumstances. The Institute has recognised the need continuous review of the ATP. It has experimented fairly radically in the past with its form. In the mid-1980s (the 1983/84 and the 1984/85 courses), the trainees were expected to do a three month period of individual study in their own country. This individual study period assumed that the selected trainee would be entirely relieved of his or her professional responsibilities and that a former IIEP trainee would act as a 'monitor'. The self-study instructional material was intended to bring all of the trainees to the same level when they started together in Paris. Unfortunately not all of the trainees were able to use the opportunity effectively so it was decided to revert back to the longer period in Paris.

The end-of-course evaluations as well as the tracer studies in 1986 and 1996 are also intended to help evaluation and, if necessary, modification of the course. It is understood that in 1992, the external evaluation referred to in section 6.3 above with some other studies was used for this latter purpose.

The danger is that the programme may be too 'introverted', in the sense of being supply-orientated rather than demand-led - delivering content that reflects in-house themes of IIEP research and studies rather than necessarily what the trainees and their employers most need. Alternatively, the course could draw on a wider range of personnel, using more staff (especially developing country nationals) with recent field experience of practising education management and planning - and even full time practitioners. This view was strongly put forward by a senior Indian civil servant. There is a need to keep up with the field.

Any elements of criticism that such observations contain could be levelled with even greater force at many university courses on education planning and management in developing country, in both the 'north' and the 'south'. The exploration of access and equity, rate of return analysis and manpower forecasting may seem to some 'old hat' that should be given less attention. However many developing country policy documents, and many donor country reports continue to use these concepts in their analysis and prescription. Moreover the materials and examples used in the ATP from IIEP's contemporary research give an immediacy and relevance to much of the course content. In terms of its pedagogy, IIEP is conscious of the need to adopt modern approaches but at the same time, with a view to assisting those from training institutions in developing countries, not to engage too extensively in modes of instruction that would be inappropriate or, because of lack of resources, impossible for application by its partners abroad.

IIEP's own 1994 report to Sida suggested that the environment for educational planning is changing and the programme needs regular updating to take account of, for example, changing perceptions of the role of the state in education, increased interest in measuring learning outcomes, and the place of new communication technologies in education management. Accordingly, we would suggest that some of the areas where IIEP could usefully reinforce its efforts in future are:

- * more attention to the practical issues of management, and of implementation of policies and plans;
- * more balancing of the 'technocratic' aspects of educational planning with the political aspects, including communication and persuasion;
- * a greater recognition of the implications of the changing role of the state in education for educational planning itself, in terms of new and subtler forms of influence and 'steering' to replace the old command and control approaches, bearing in mind the larger role of the non-government sector, of local government, of partnerships with parents and communities etc.;
- * more recognition that planning is a function not only of national level authorities but also of those at local and school level: and that it has to do not just with planning student and teacher numbers and money, but with curriculum and content and with interactions in the classroom too;
- * more focus on school-level planning and school improvement;
- * greater exposure to new information technologies and computer techniques for data collection analysis and management;
- * more training in social survey techniques including design and administration of questionnaires, sampling techniques etc.; and
- * increased opportunities for staff from training institutions in developing countries to focus on the design and delivery of training courses in educational planning.

The difficulty is that the programme is so crowded. Already many existing topics can only be addressed in an introductory way to provide sensitisation to concepts rather than practitioner competence. The basic dilemma here is whether the ATP should be an introductory course, or an advanced professional programme framework catering for specialists. At present it is trying to straddle both. If it is to be the former, then that implies that the elements suggested above, and the greater emphasis on implementation and management, would be accommodated in an expanded core lasting perhaps into February, and that ATP trainees would take fewer options. For specialists, the modules might need to be converted to more intensive courses of four to six weeks each.

If, on the other hand, the ATP is to be a genuinely advanced course, building on previously-taken basic programmes, then the existing core could be remodelled to exclude many of the present introductory elements and to place more emphasis on implementation strategies and practical applied skills of a more specialised kind for the senior practitioners. Possibly in that case the present 'streams' and modules would have to be lengthened and deepened.

A decision on how to redesign the ATP is not an easy one, given the centrality of the ATP to IIEP's work, its evident current ability to attract custom and its popularity with clients. But it appears to us that the present programme represents a somewhat uneasy compromise in its

attempts to straddle many different clienteles and that it could be made still more relevant and useful. Those coming as visiting trainees to take the ATP modules would in many cases find the higher level and more specialised programme attractive.

One approach is to take up the specific suggestion which was made to us in India that the core element (in the second phase) which at present takes place in Paris from October to December should, instead, take place in one of the less developed countries such as India for the Anglophone group and Morocco for the Francophones. The third phase, with the streams, modules and terminal paper, would take place in Paris at the Institute as at present.

The advantage of this would be appropriate context, lower tuition and student costs. Both the country study visits would be made locally (in France and the other country) and again for less cost. It would be a major institution-building exercise and make a strong statement of commitment to the less developed world. The disadvantages include the far greater complexity of arranging and establishing a course in three different centres and coordinating both the academic and the student welfare aspects. Additionally it would be a particular challenge to bring together the Francophone and the Anglophone groups at a point when quite strong bonding would have taken place within each language group separately.

One possibility is that IIEP should enlist an external group of professionals, perhaps from among its Consultant Fellows, to report on the current training needs for educational planners in IIEP's main 'client' countries, to review the ATP in the light of this and make recommendations to the IIEP Director and Governing Board on the structure and content of IIEP's training programme. On the basis of our own limited acquaintance with the programme, and without wanting to prejudge the findings of any such review, we would expect the ATP would survive in a modified form, but would be supplemented by a number of advanced offerings for specialists, of greater depth and length than at present.

6.4.5 Academic Diploma or Certificate of Attendance?

A perennial question posed by some respondents in the tracer studies (past and present) and the case-study interviews is the final status (in academic terms) of the course. Should it be given academic validation or should a Certificate of Attendance continue to be issued at the end of the course? This question has been a point of debate for many years. A number of the former trainees spoke to the two consultants about this issue. There are several strong arguments in support of it being made a Masters or a Postgraduate Diploma.

- * It would give the successful trainee a higher professional status, resulting in greater weight attached to his or her work and advice;
- * it would be relevant to trainees' promotion prospects, and thus, again, to the chance of putting into effect skills and knowledge learnt at the ATP;
- * it would attract a higher quality of student who at present attends academic courses elsewhere;
- * it would require monitoring of the ATP programme by an outside academic institution, to the benefit of IIEP as well as its trainees; and
- * it would act as a spur to the few trainees who do not take the course seriously enough.

The arguments against are also strong:

- * The course is designed for people who start from a wide range of academic backgrounds. Some who have already done high-level (often postgraduate) studies would have no difficulties with an academic course - but they are not the group most desiring validation. Others, who have only had limited tertiary education opportunities would struggle and might fail. The effect of academic validation would be divisive to the group;
- * what is important is that every trainee gains from the course, not the precise level of attainment reached;
- * one of the useful aspects of the course is that it is very practical, and so different from other courses. There is a danger that it would be forced into a more academic mould;
- * the course would have to be linked to an existing institution. Talks have been held with the University of Dijon and the Institute of Education, University of London. This would further constrain the flexibility of the course and bring added costs. It is possible that some very experienced practitioners of considerable potential could not meet university entrance requirements and so would be denied admission; and
- * in cases where a postgraduate qualification had to be withheld, this would bring IIEP (a UN body) into possible contention with the unsuccessful trainee and the trainee's employer (usually a ministry of education) and sponsorship agency.

We believe there would be no point in providing a form of academic training which was little different from other internationally available courses. It would make the possibilities for radical changes in the ATP more difficult if not impossible. The need to make the course more coherent, and to require the fullest commitment by trainees, is one which should be continuously addressed. However it is not necessary to change the whole status of the course to achieve this. We do take seriously the question of whether the lack of formal academic qualification is, in the longer term, a real barrier to professional recognition and to promotion prospects or to IIEP's capacity to attract the best students. Further study is needed to gain real evidence. On the evidence available, the consultants are inclined to the view that the present position should remain.

6.4.6 Efficiency of provision

The programme appears to be efficiently managed. The selection of the trainees is made by a committee on which all IIEP teachers sit and communication with applicants seems to be clear and rapid. There are always problems with accepted trainees who have no funds but the Institute provides advice on which organisations applicants in particular countries should approach. The Institute has a clearly worked out programme for the trainees when they first arrive in Paris - a particularly crucial time. There was some criticism from Anglophone trainees about delays in organising the French conversation tuition.

As far as the course is concerned, there seems to have been no serious problems either with the written material provided to the trainees or the lectures. Trainees (and one Visiting Fellow who sat in on some of the third-phase lectures) who were themselves lecturers in their own institutions commented favourably on the efficiency with which everything was organised and put this down to IIEP being a first world institution (not an infallible indicator!).

The Study Tours are probably one of the most difficult parts of the course to organise. There

were some comments emphasising the benefit of locating these in developing countries wherever possible, but the reaction to the tours themselves was positive with no negative comments made at all. Indeed a degree of flexibility which can be difficult to build in was clearly present in these visits.

6.4.6 Financial cost of the programme

The Institute issues to all students accepted and their potential sponsors what it calls a 'budget justification' in respect of the ATP. This sets out the costs which have to be met by the trainee personally, or more usually by sponsors through provision of a fellowship; and expenditure met by IIEP funding out of its main budget. The amount of FF148,000 to be met by the fellowship is (for the 1995/96 course) broken down as follows (in FF):

Trainee or funder	FF	FF
a) Tuition related costs		
Teaching materials, external lecturers & advisors, admin.	25,000	
Study visits (travel)		17,000
Books & equipment	3,000	
	45,000	
Computer + software (optional in 1995/96, not thereafter)		15,000
b) Student support costs		
French tuition (for Anglophone students)	4,000	
Stipend, medical, terminal allowance, etc.	84,000	
		88,000
Total		148,000
	(US\$1 = FF5.0)	(US\$ 29,600)

Of the above items, the amount for student support costs (FF88,000) is, to some degree, variable, depending on the particular accommodation the student takes, and whether or not he or she has to be given French tuition. The cost of the books, small equipment and computer is also variable, depending on what the individual purchases. They become the property of the individual student and are taken home. They are, however, an essential requirement for the training. Finally the study visits and the teaching materials, some of which go directly in payments to external staff and some which are a payment to the Institute, are not under the control of the student.

The budget justification also states that expenditure of FF35,000 for teaching staff and FF15,000 for administration is carried by the IIEP budget. This is equivalent to US\$10,000. However we understand from other information provided by IIEP that the real cost is about US\$20,000 per student, the amount contributed by Sida. Our understanding is that the components of this figure are US\$7,000 for teaching staff salaries, US\$6,500 for salary costs for the training unit staff and administration, US\$6,500 for course expenditures other than salaries (interpretation, travel, materials, etc.). This makes the actual cost per student, including his or her maintenance while in Paris and the cost of books and equipment which will be taken home, a total of US\$49,000. In addition, there is the cost of the return airfare to the home country: and in some cases, the employer is also paying the trainee's salary.

This is a course which is about twice as expensive for the funder as a twelve-month Masters in education, charging full-cost tuition fees, would be in Britain (which we use as an example only because we are familiar with the situation there). In part, however, this is due to the special nature of the ATP. For example the cost of interpretation, the translation of material, the study visits, and the computer and its software (which becomes the property of the trainee) are expenditures which would not be covered by the normal overseas fees in the UK but which are essential elements of the ATP course. The recommended monthly stipend of FF9,500 (US\$1,900) is also high by British standards, but we are advised that, for the individual trainees, it is not excessive. Indeed some students find it difficult to live on.

Without a far more detailed study, one cannot be certain whether sensible economies could and should be made in the ATP course. The potential for savings if the programme was moved to a developing country is obvious, but there would also be extra expenses involved in the coordination of the training programme and the social support for the students.

CHAPTER 7

INTENSIVE TRAINING COURSES, RESEARCH SEMINARS, POLICY FORUMS AND WORKSHOPS

7.1 Introduction

IIEP holds most of the ITCs and seminars away from its base in Paris. Intensive training courses (ITCs) and seminars have been described above in sections 3.1.4.1.4 and 3.1.4.1.5 respectively. As their name implies, the intensive training courses mainly focus very concentrated training on a specific topic and last between one and four weeks. Many of the topics are ones which have been the subject of recent research conducted under IIEP auspices, but sometimes they are subjects of perennial concern to educational planners.

'Seminars', is the term we will use to include research seminars (both national and international), policy forums and workshops. They cover a wide range of events from the preliminary discussion of research findings by the researchers themselves to small gatherings of world experts (always including those from third world countries) to discuss a particular issue. Seminars last a few days to a week, with a maximum of ten days.

There is an uncertain boundary between ITCs and seminars. On occasion events classified by IIEP as ITCs are actually used as research seminars of only a few days to a week, whereas many so-called seminars will be found to include a great deal of teaching and learning. At times we have been bewildered by the classification of events and recommend that definitions be applied in a more systematic way than in the past. This is not just a matter of tidiness in terminology, it also has consequences for IIEP networking of its contacts (see section 10.6 below).

7.2 Sida funding agreements

The 1990-92 agreement states that 'particular priority is attached to ... IIEP specialised training courses and the promotion of extra-mural activities...'. In Sida's funding proposals for these three years, seven ITCs and two seminars are targeted for funding - US\$367,000 or just under 40% of the funding provided by Sida for the ATP. The January 1993 - June 1994 agreement does not mention ITCs at all in the text but does refer to IIEP's ability to organise seminars on topics of interest to the educational community. In 1993, the only ITC to be supported received US\$30,000, less than one tenth of that provided for the ATP.

The last agreement for July 1994 - June 1996 returned to the ITCs as being 'targeted at officials who cannot be away from their work for more than a few weeks.' It has no specific discussion of seminars and only refers at one point to 'training courses and workshops'. However the funding proposals target six seminars and three ITCs to be funded by US\$223,000, a little over one third of that proposed for the ATP.

7.3 The number of ITCs and seminars and expenditure

There has been a general increase in the number of ITCs from 1990 to 1995, a trend probably continuing in 1996; the number of seminars is far more variable, with no discernible trend.

The annual accounts record expenditure on ITCs and research seminars separately - but it is not clear if the latter includes other workshops and seminars, or if they would be included under another budget head. The expenditure on ITCs is greater than that recorded for the research seminars and workshops. Taking these figures together, spending on ITCs and seminars has increased since 1990. If the total of the two combined is compared to that on the ATP (which has remained comparatively stable), it was about one fifth in 1990. In 1991, it was virtually the same and in 1992, 1994 and 1995 it surpassed the expenditure on the ATP. Figures for 1996 were not available at the time of writing this report.

7.4 Previous Evaluations

7.4.1 General

We are only aware of one major external evaluation on an ITC. This was on ITC85, a distance education course in the Caribbean, April-June 1994. We understand that each course, seminar and workshop is evaluated by the participants at the end of the respective meeting. We have obtained copies of three participant evaluations administered after the ITCs in question.

7.4.2 Course evaluation by of 'Textbooks for All' (ITC85)

This ITC was run jointly as a distance education course by the University of the West Indies with material provided by IIEP. The course enrolled groups of students on the different islands, some of them linked by the University teleconferencing facility. The evaluator, Dr. Michael Louis of the St. Lucia Ministry of Education, selected a structured sample of 38 participants designed to be representative of the whole group of about 140. The evaluation, conducted as the course was ending, mainly focused on what the students thought of the course but also dealt briefly on what had they gained from it.

Dr. Louis' conclusion was that the course had been very well presented by the University with material that was of 'high quality and relevance'. There had been a number of problems, but these were mostly comparatively small: the most serious was the unreliability of the teleconferencing, but others included inadequate binding of the booklets, the need for reference lists of additional reading material, etc. It is clear that the expertise in distance education of the University, which was responsible for the actual running of the course, was essential but benefited from the quality of the material provided by the Institute.

7.4.3 End-of-course evaluations

The first end-of-course evaluation we have was of a course on the design of basic education programmes and projects held in Malaysia in 1993. The trainees were asked to comment on the structure of the course and methods of training (10 questions) and the content (nine questions). In all cases, the respondents all 'agreed' or 'strongly agreed' that the methods of teaching or the material they had been taught were satisfactory. The question about whether the 'assistance provided by advisors was adequate' gained the highest approval ranking (19 strongly agreed, 3 agreed). The lowest ranking related to the balance between plenary and group work. The only points which provoked critical comments (and then only by a very few who thought provision was inadequate) related to meals, the secretariat services, the accommodation and the location.

The second evaluation was of a course on higher education management in Africa. The

analysis of the problems and the sharing of experiences were ranked very highly while the attempts to deal with the problems facing higher education were much less favourably judged. The contents of the course were mostly ranked highly as were the methods of working. The least appreciated technique used was group work.

The final evaluation was one made of the sub-regional seminar on data building and data management in Harare, Zimbabwe in September 1992 with 38 people present. In this case, the completed questionnaires were analysed by the Ministry of Education and Culture in Zimbabwe. According to the questionnaire analysis, the contents of the course were generally very well received and the external organisation by IIEP was judged to be effective; but serious problems with the local organisation of the physical arrangements were identified. However not all of those who were interviewed by the consultant in 1966 were as positive about the contents as the end-of-course evaluation suggested. Criticisms of the organisation of this particular course were repeated to the consultants in Tanzania and Zimbabwe. Even some Zimbabweans centrally involved in the organisation of the course felt that the large numbers of participants had adversely affected some of the training taking place in this particular ITC.

7.5 Assessment of the ITCs

7.5.1 General

This part of the report draws on the small amount of documentary material referred to above, on IIEP reports, on returned questionnaires from those in the three case-study countries, on conversations with members of IIEP staff, and on the interviews held by both consultants with those who had attended the meetings. The consultants only received information about seminars attended by participants from the case-study countries after they had completed their visits there; no questionnaires were sent to these participants and they were not specifically interviewed and so there is far less material on which to base any assessment.

7.5.2 ITCs and Seminars: location and participation

The location of 85% (52 out of 61) of ITCs accounting for 91% of total attendance and 69% (38 out of 55) of seminars was outside Europe. Twenty out of 26 meetings (ITCs and seminars combined) in Europe were held at IIEP.

The intention of IIEP is that its meetings and activities should be targeted on the less developed countries. An important way of ensuring this is to hold them in such countries and regions, and the great majority of ITCs and seminars take place there. However there is a significant proportion being held at IIEP and other venues in Europe. The events at IIEP have a similar objective to those held in developing countries. These IIEP meetings have been used for specialised ITCs, often at the request of national ministries, and for inter-regional seminars on subjects such as the effect of HIV/AIDS on education or the improvement of managerial efficiency in higher education institutions. Several of the meetings elsewhere in Europe have been used as training and updating meetings by the European aid agencies (including Sida itself, NORAD, the Swiss DDA and the French Foreign Ministry).

The proportion of women attending ITCs at 27% is even lower than for the ATP. No break down by region was available but it is understood that, as with the ATP, the proportion of female participants on the ITCs from Latin America and the Caribbean was over half. In the

case-study countries, for which we had full data of attendance at both the ATP and ITCs, in the 1990s the attendance by women at the ITCs was far lower than on the ATP, although there was an improvement on the even worse pre-1990 figures. Women accounted for a higher proportion of participants from India, on both the ATP and the ITCs, than those from Tanzania and Zimbabwe.

IIEP certainly has less control over who attends ITCs than it does in respect of the ATP and there have been cases where not a single female has been nominated. As noted above, to some extent this seems to be associated with the country/sub-region in which the ITC is being held and is more likely to occur in more technical areas like finance and management than in others.

We note that the Institute does not analyse or publish the gender breakdown of attendance at ITCs (or seminars). The absence of this information in readily available form suggests that achieving an increase in the level of female participation at these meetings has not been high on IIEP agendas.

7.5.3 How individual trainees viewed the courses and meetings

Those who have attended the ITCs from India, Tanzania and Zimbabwe from 1990 to 1995 were sent a questionnaire and many were also interviewed. The questionnaire asked two basic questions:

Did the meetings broaden the understanding of educational issues? All but one gave this question the top rank of 'Yes, very much';

Did it help in the understanding of specific technical issues and techniques? The great majority also gave this the top rank approval, but about one fifth gave the second rank of 'Yes, to some extent'. None gave them a lower ranking.

These responses reflect the enthusiasm expressed to the consultants by virtually all those who attended the courses. The benefit most commented on was the chance to meeting colleagues from other countries. Of course this enthusiasm may partly be a reflection of the fact that the respondents enjoyed the break from their day to day work.

Individuals in quite different areas of work said they had been able to use the knowledge they had gained in a practical way. University administrators in Zimbabwe and India described how they intended to introduce changes, some small, some large. A member of a ministry statistics department described how an ITC on data analysis made him aware of the pitfalls in statistics collected to help determine allocations to different schools. We were given other specific examples of the direct utility of courses.

One comment which came up several times was that IIEP staff did not dominate the proceedings but allowed space for those attending to participate actively. However the staff were also very skilful in making themselves available to help when needed. Another participant was impressed that all of the material was prepared specifically for the course and not simply photocopied from books. The use both of participants and of local consultants to make such presentations was commended, recognising that prestigious foreign consultants can sometimes be quite ignorant of local conditions. This made a recent ITC, which did not make use of third world expertise, all the more unsatisfactory to some who attended.

Both those completing the questionnaires, and the interviewees, asked for more follow-up of the courses, so that they could build on what they had learnt. Some recognised that this was a demand that local institutions or ministries should address.

In the instances where it was reported to us (usually by someone who had been to an ITC), the experience of those who had attended research seminars was very similar - an enjoyment of the international contacts and the satisfaction of having gained a greater understanding of their job.

7.5.4 Relevance of the courses to participants' home countries

Reference was made to the topics covered by the ITCs in section 3.1.4.1.4 above. In the view of the consultants, these seem to be very directly relevant to the needs of educational policy and administration. Some are basic to the work of the planner such as school mapping and microplanning. Some convey new understandings of processes involved in, for example, higher education management, decentralisation of the management of secondary schools and new methods of presenting educational statistics to make them more comprehensible both to senior administrators and to interested members of the public. All of these were specifically mentioned to the consultants in interviews by those who had attended ITCs on these topics.

The topics covered by the seminars tend to be more wide-ranging than those of ITCs and often take the form of a debate or discussion on ways forward with a particular topic. A good example is the seminar on 'Strengthening national training capacities in educational planning and administration' held in December 1990 at IIEP. Senior academics who were mostly directors of training institutions or university departments from Latin America, the Arab states, Asia and Africa, came together and over a period of five days discussed the topic and made proposals. The proceedings were published by the Institute. The topics covered by research seminars, both national and inter-regional, may become ITC subjects later.

The subjects addressed have their genesis in the Medium-Term plans of UNESCO and IIEP and further elaboration in IIEP's more detailed annual plans. It is not entirely clear to the consultants how coherent the strategy is for choosing subjects for the ITCs and Seminars .

7.5.5 Efficiency of ITCs and Seminars

Organising courses or meetings in another country is not easy. Most of the courses and seminars are therefore run in cooperation with a local institution or ministry. The comments of those local individuals responsible for organisation on the ground were all very positive. They felt that they had been treated as responsible people. The provision of finance by IIEP has been on time and without undue hassle.

Participants have also commented on the efficiency with which the events have been run. Papers have been received on time, proper directions given for travel and, usually, sufficient equipment provided. Accommodation has been one aspect which has received occasional criticism. IIEP staff commented on the very occasional breakdown in local arrangements necessitating the course organiser from IIEP to step in and take emergency action.

7.5.6 Finance

For illustrative purposes, we show the budget breakdown (in US\$) for one ITC, one Seminar

and one Workshop. These were chosen from among those supported by Sida. The budgets of the three meetings are shown below (in US\$). The codes stand for:

A = ITC in South Asia on the design of development programmes;
 B = Seminar in South Africa on information systems for teacher management; and
 C = Workshop held in South Africa and in Paris to train national trainers from the South African Graduate School of Public and Development Management

	A	B	C
Participants (travel, living expenses, misc.) 19,096	24,150		18,889
Travel to France			25,011
Consultants (contracts, travel and per diem)	18,115	8,287	6,958
Staff time (Senior & Junior Officer, Secretarial)	55,443		
Staff time (Senior Officer, Secretarial)		29,104	
Staff time (Senior Officers, Secretarial)			22,814
Workshop materials (monographs, reports etc.)		15,300	
Programme support costs	12,702	9,305	9,604
Total	110,410	80,885	83,483
From Sida's voluntary contribution	48,500	19,830	54,210

All of these expenditures come under the main training budget of the Institute.

The ITC (A) has not been identified to the consultants so it is not possible to say how many attended this course and where they came from. The numbers attending seminar B in South Africa (B) are also not available. It is therefore not possible to give a cost per participant for these two meetings. For workshop C in South Africa and France, the number attending was 12. The average cost of this course was US\$6,900 per participant including the visit to France. There is, of course, the additional hidden cost borne by the employer in releasing participants from work. However this will be balanced by the expected gain in the productivity and competence of the trainees.

We would expect the above costings to be fairly representative but cannot be certain this is so. The variables will be the number attending, the length of the activity, the distance that individuals will have to travel, the number of IIEP staff attending, the type and quantity of 'workshop material' and the number of consultants it is necessary to use.

We would observe that in each of these cases, the wide gap between Paris cost levels and those in developing countries is evident. Thus (apart from the travel to France in C) rather less than one quarter to one third of the cost of the events is expenditure on travel, and living expenses during the seminar, of local participants. This is a challenge faced by many international cooperation agencies. It would obviously be cost-effective to find ways to spread the high overheads across more participants.

CHAPTER 8: RESEARCH AND STUDIES

8.1 Introduction

Our terms of reference list 'research and studies' as one of the four principal types of activity through which IIEP pursues its main objective of promoting effective educational planning in developing countries. As Table XI (Chapter 3) indicates, research accounted for 17% of all IIEP cash expenditure, and 22% of programme expenditure, between 1990 and 1995.

Thorough appraisal of the research programme would need a much deeper analysis than has been either required of, or possible for, the present consultants to undertake. In the brief time at our disposal we have only been able to draw information from interviews with IIEP staff and with researchers on the projects encountered in the course of the case studies, review of IIEP reports, and consultation with a number of leading professionals familiar with IIEP's work.

IIEP's Reports of Activities make a point of recording progress on the various projects. Out of 28 pieces of work under way in 1995, half (14) were completed during the year, five had been initiated and nine were in preparation. An acceleration in the expansion of the research workshop and seminar programme has also taken place: as was discussed in the previous section under the heading of 'seminars'.

The emphasis in IIEP's research activities is on applied research, with a particular recognition of the symbiotic relationship of research and training. One of the expected products of the research programme is that it will generate research reports which can be, as the eighth agreement with Sida puts it, 'adjusted and elaborated to serve as training materials in courses, workshops and seminars'.

Improvement of the training programmes is not the only objective of IIEP's involvement with research. Research findings are normally published and so may have a direct impact on policy. Further, co-operative programmes with IIEP are often a vehicle for training researchers in developing country institutions. Examples of all these functions of IIEP research support became evident in the course of this study.

8.2 Sida Support

While Sida support for IIEP has been predominantly in the area of training, applied research and studies have consistently figured in the programme, and constituted the second most important component of IIEP-Sida co-operation in the period 1990-96. The two activities are indeed closely related in Sida's thinking: in supporting research one of Sida's purposes was 'to vitalize IIEP training programmes'.

One special initiative in the early part of the period we are reviewing was Sida-IIEP co-operation in support of the Southern Education Research Initiative (SERI) which links professionals in developing countries engaging in educational research and seeks, by developing 'Southern' research capacity, to avoid domination of research agendas by assistance agencies and industrialised-country research interests. The International Institute of Education of Stockholm University and IIEP collaborated in mounting the research seminar at IIE in

1991, which led to the establishment of SERI in 1992: this event was funded by Sida which has continued to give financial support to the new organisation. Although IIEP has not financed SERI, it has maintained close contact and has given professional support, most recently by publishing three volumes on *Education research in the South*, prepared by SERI and funded by Sida.

Sida has been concerned that IIEP research should impact on practice. The 1994 agreement with IIEP makes reference to ensuring that research activities were brought to completion; to the dissemination of results through the publications programme and the holding of research seminars; and to linking the research programme with institutional development by ensuring that national institutions and national research teams are involved in design and implementation of the programme.

Section 3.1.4.2. of this report outlined the areas on which IIEP has concentrated in its research and studies in the last Medium-Term Plan period (1991-95) and the current Plan (1996-2001). There is some congruence of interest between Sida priorities and those of IIEP, particularly in the area of basic education and the stress (in the new Plan) on disadvantaged and minority groups. The largest Sida grant under the agreement which has just expired (the eighth) was for research on decentralisation mechanisms for the management of school quality, a central concern of Sida's Education Division, in South Asia. On the other hand, two of the three themes supported by Sida in the 1994-96 agreement period focused on secondary education development ('financing of secondary education after Jomtien', and 'planning the provision of science education in secondary schools'): this level of education does not appear to be accorded priority in Sida's January 1996 policy statement on co-operation for education development, which was being drafted over the period for which the eighth agreement was in operation.

8.3 Impact of IIEP research in the case-study countries

In the course of the country case studies, the consultants saw evidence of the fruitfulness of some of the research work in which IIEP has been engaging with its partners. Examples of influential studies impacting on capacity-building and education policy will be found in each of the three studies appended to the report. India, for example, was one of five countries involved in the Sida-supported research project on decentralising the management of schools in South Asia: this project and its findings have played a catalytic role in the creation of the Asian Network of Training and Research Institutes in Education Planning (ANTRIEP). Also in India we understand that the Madhya Pradesh study served as the basis for the District Primary Education Programme along with a number of other inputs.

In Tanzania, at the end of the 1980s Sida funded a well-executed and influential project led by IIEP on evaluating adult literacy programmes, which then became the subject of a Sida-financed Research Workshop at Morogoro in 1990. This research was undertaken by Tanzanian staff working with an external consultant, and it was reported to us that the research findings (to the effect that the efficacy and reach of the adult literacy programme were much lower than had been assumed) led to some major policy shifts on the part of the Government of Tanzania and of aid donors.

Although the enterprise was not specifically supported by Sida, we should also refer at this

juncture - in the context of research observed in the course of conducting the country case studies - to the programme in Zimbabwe. Here IIEP has assisted an important national and international project on the monitoring of education quality, which has focused on the development of instruments for use by governments in policy making on improvement of schooling and schools. It involved an international team of researchers from Southern Africa who were able to apply the skills and methodologies they had used in assessing Zimbabwe's education system, to an analysis of their own national situations. They, and their sponsoring education ministries from a group of African countries, have now joined together to form the Southern African Consortium for Monitoring Educational Quality (SACMEQ). The initial work of the group on Zimbabwe has been written up in a special issue of the International Journal of Educational Research under the title 'From educational research to educational policy: an example from Zimbabwe', with Kenneth Ross of the IIEP staff as guest editor. In that volume Fay Chung, the former Minister of Education in Zimbabwe, describes the project as an important initiative which she sees as a partial breakthrough in meeting the perennial challenge of 'how to move from research and conferences to real decision-making, transformation and action'. In the same journal, the Deputy Permanent Secretary of the Zimbabwe Ministry of Education supplies concrete examples of the action taken by the Ministry to implement the policy suggestions made in the research report. Apart from policy impact, the most important aspect of this work is the training in analytical methods and research techniques that the participants have received, leading to personal professional growth, and thus to enhancement of the capacity of their employing organisations.

We have cited only instances of research impact on policy from countries where we conducted case studies: further examples are doubtless forthcoming from other parts of the world.

8.4 Overall scope and relevance of the research and studies programme

The programme is wide in scope. In 1995 there were 28 elements in the programme under the four headings of improvement of the quality of basic education; finance management and administration of education; development of human resources; and comparative studies of educational planning experiences. There is considerable heterogeneity not only among these four main themes, but also within them. For example, the theme 'financing, management and administration of education' is a kind of umbrella under which three quite distinct areas of work take place: finance and budgets, management of institutions of higher education, and teacher deployment. Under the sub-theme 'management of institutions of higher education', for example, there are in turn four quite distinct case studies being undertaken on management of information systems, university industry co-operation, inter-university co-operation, and non-traditional delivery systems in higher education. The theme of 'comparative studies of educational planning experiences' involves four totally separate sub-themes: planning lifelong education in industrialised countries; trends in the financing and management of technical education and vocational training; study of curricula in educational management and planning; and education and marginality in urban areas.

The majority of the topics being addressed in this research programme appear to be ones on international agendas at the present time, and in that sense the subject matter of the research focuses on relevant themes.

The spread of research work does seem wide, given that IIEP's professional staff is not large.

About 15 to 18 persons have been working recently in the training and research programme and they have responsibilities for training, research and studies, for delivering technical assistance and supporting the training of trainers/institutional development programme. Some of the research themes that IIEP is addressing would ideally require prolonged engagement by two or three senior professionals to make real impact, even accepting that IIEP's preferred method of work is to collaborate with research workers in its partner countries rather than to do all the work itself. Might it not be better to narrow down the range of themes to which the Institute devotes its study and research programme, thus drawing advantage in terms of closer quality control of work undertaken?

The consultants encountered particular interest in the kind of work that the Zimbabwe/SACMEQ project has been attempting, with the prospect it offers that IIEP's research programme can help produce tools useful in implementation of plans and policies. What opportunities are there for IIEP to devote more of its intellectual resources to addressing issues of policy formulation and policy implementation, and finding ways to make the government machinery work better? This relates to the issue of the relevance of the form of research output. One very senior interviewee in a case-study country observed that IIEP research reports tended to be too long and insufficiently focused for busy practitioners, who had neither time nor inclination to wade through lengthy narrative texts. IIEP addresses this concern to some extent by providing summaries of research findings in its Newsletter, a service which readers obviously find useful. There may be scope to supplement these efforts by producing shorter policy- and practice-oriented reports and publications in the form of briefing notes or guidelines on key topics, setting out options, summarising experiences and drawing attention to sources of further information. We understand that some current thinking within IIEP is along similar lines.

8.5 Cost-effectiveness

On the basis of what we have had time to accomplish, we do not feel justified in drawing conclusions about the efficiency with which the research and studies programme is managed. Had time permitted we would have wished to examine a representative sample of projects and to have analysed in respect of each the volume and flow of research products of different kinds in relation to IIEP's declared intentions; and to have checked what proportion of the written output was published and the extent of distribution.

In terms of finance we were provided by IIEP with a budget breakdown for two IIEP research projects, chosen by us at random, funded by Sida. The first was the project on the financing of secondary education after Jomtien. Within the framework of this study, fee and consultant contracts and travel were funded to make possible the revision of national case-study reports, to analyse data and to prepare and finalise the study (which appeared under the project title - 'Financing secondary education after Jomtien'); and US\$57,000 was allocated for these purposes. Total project expenditure of US\$115,000 also included US\$45,000 for IIEP staff time and \$13,000 for IIEP's programme support costs. Sida, in providing US\$60,000 in the years 1995 and 1996, financed just over half the costs that fell to the IIEP budget.

A second research project for which funding details have been provided is that for research on decentralisation mechanisms for the management of school quality in South Asia. As part of this project, meetings were held in India and the Philippines; and collaboration took place with

the parallel study in Mali, involving provision of consultancy services, staff visits to Mali and visits by Malian researchers to Paris. The total costs to IIEP were US\$ 169 000, of which, staff time and programme support costs at IIEP accounted for US\$81 000: the remainder covered the costs of the meetings, and travel and per diems for the consultant, IIEP staff and Malian researchers. Sida again contributed just over half, at US\$87 000.

Analysis of this financial information shows that in these two cases staff and other overheads at IIEP accounted for roughly 50% of project costs. Without more information on time expended, we have no way of judging how reasonable this proportion is. On the basis of the figures cited, each of the projects seems expensive, given that they do not apparently include the cost of the case-study reports themselves. It would need a careful analysis of all the direct and indirect inputs and products of the research before reaching conclusions about cost-effectiveness.

CHAPTER 9

TRAINING OF TRAINERS, INSTITUTIONAL DEVELOPMENT AND NETWORKS

9.1 Introduction

This is a rapidly growing area of work which has developed from a generalised commitment in the Fifth Medium-Term Plan (1990-95), giving priority to the 'training of trainers', to the proposals for a series of specific programmes in this field in the Sixth Medium-Term Plan (1996-2001).

An important aspect of this has been the setting up of a network of institutions in partnership with IIEP and the development of networks in Africa and Asia (see section 3.1.4.3 above). Among the 13 partner institutions with formal agreements with IIEP are ones in India (the National Institute for Educational Planning and Administration) and Zimbabwe (Department for Educational Administration, University of Zimbabwe). Both were visited as part of the case studies.

There have been no evaluations of this area of activity as such.

9.2 Sida agreements

The 1990-92 agreement does not mention this area of work either in the written or the financial agreement. The January 1993 to June 1994 agreement reports that the 'high priority given to the establishment of a network of training institutions in the Training of Trainers programme will remain during the coming years'. It states that this will take the form of the training of national institutes' staff, the development of training material to be used by these institutions, and involvement of national institutes' staff in IIEP training programmes. The funding made available in 1993 included US\$27,000 to strengthen the cooperation with training institutions and US\$43,000 for the preparation of teaching and learning materials.

The July 1994 - June 1996 agreement has a whole section on 'Institutional Development'. After commenting again on the high priority being given to the Training of Trainers programme, it states that IIEP envisages intensifying its cooperation with a selected number of institutions to get this multiplier effect - and it gives a list of four areas of activities including participation in the ATP, ITCs and seminars; the development of specialised modules for the training of trainers; the dissemination of training material; and involving the training institutions with development projects. The financial proposals designated US\$50,000 for training of trainers for institutional development, US\$39,000 for teaching materials and a further US\$80,000 for distance-education material which can also be used by institutions.

The growth in importance of this topic as part of the programme put forward for Swedish funding has coincided with the move within Sida as a whole to put a greater emphasis on institutional development.

9.3 Partner Institutions

Although the regional offices of UNESCO gave basic training in educational planning and administration in the 1960s and the early 1970s, by the 1980s the amount of regional training taking place was very limited. This was cited as one reason why IIEP had to launch a training of trainers programme in the mid 1980s. At that time, IIEP was reporting that its training

activities 'could never be sufficient to meet the ... needs' of the majority of the member countries. ('The training of trainers in educational policy. Report of an IIEP workshop'. Nairobi 1987 pg5) The seminar in IIEP in December 1990 (see section 3.1.4.3) proposed that national training capacities would be strengthened by a programme of partnerships between IIEP and a number of institutes in the less developed countries. By 1995, 13 agreements had been signed and two were in preparation.

The agreements between the Institute and its partners set out the obligations and benefits applicable to each party. They suggest that there will be participation on an equal basis in training, in sharing of research results, in exchange of training material and of publications. The reality is that IIEP is so much stronger and more securely based with a longer history than most (not all) of its partners, that it is quite evidently not an equal relationship. The scheme is a radial one, with links to and from IIEP and not (as part of this scheme) laterally between national institutes. For example, we have come across no links between the partners in Zimbabwe and Mozambique despite their close geographical proximity.

Following the December 1990 seminar, the programme started with great hopes and plans. Individual members of IIEP staff were designated to be responsible for the different institutions with the responsibility for overall coordination in the office of the Director. An internal monitoring committee was established in January 1994. In a report reviewing activities from the end of 1990 to mid 1994, it was noted that there was a 'predominantly pragmatic approach to this project'. It said that IIEP intended to stage a second seminar for members of the network. This was also referred to in the July 1994 - June 1996 Sida agreement where it states that a workshop would be held with Swedish support 'to gather its partnership institutions around a topic of common interest'. This meeting has not in fact taken place because of cost considerations and the progress in the programme was insufficient to justify the investment.

The Reports of Activities regularly describe activities under the heading of Training of Trainers - including any activity in which partner institutions have been involved. These are a very mixed bag - from major programmes of institutional development or research projects to the attendance of an individual at an ITC. Some of the former will be discussed in this section. The attendance from training and research institutions on the ATP, ITCs and as visitors to IIEP will be discussed below in section 9.4 and the formation of networks of institutions in the less developed countries in section 9.5.

The reality of the partnership programme, it seems to the consultants, has not lived up to the initial hopes. In the case where there is an already strong institution with a pre-existing relationship, such as NIEPA in India, the agreement is working and there is a great deal of interaction between the two institutions. Although the relationship would still exist without it, this agreement has probably given it greater strength. In the case of a less well established institution, such as the Department of Educational Administration, University of Zimbabwe where even those individuals involved in the original negotiations have left or are on long secondments, there is now little evidence of any active collaboration. The occasional contact (such as the first instance recently of attendance by a member of the Department's staff on the ATP) does not reflect the sort of working partnership envisaged in the agreement. We were told that these examples from India and Zimbabwe have parallels elsewhere.

The cases where the partnership arrangement seems to have worked, in addition to NIEPA, include the following:

In Mozambique, Universidad Superior Pedagógico has been assisted in the introduction of a Masters degree in educational planning and management;
in Madagascar IIEP, as the result of a government contract, is working with the Institut Malgache des Techniques de Planification (ImaTeP) to set up a specialized training course;
in Venezuela, the Universidad Pedagógica Experimental Libertador is being assisted to set up a national programme for the training of trainers at all levels in the country; and
INNOTECH, Southeast Asian Ministers of Education Organisation, based in the Philippines, has been running seminars on an annual basis in cooperation with IIEP.

There are also examples of successful IIEP collaboration with other institutions in the absence of any formal agreement

In the Caribbean, it has worked successfully in a distance education programme with the University of the West Indies;
in Mauritius, it has been collaborating with the Ministry of Education and the Mauritius Institute of Education to train trainers as part of a major programme in educational management at school level; and
in Brazil, IIEP has worked with a number of institutions to assist in the setting up both an annual course and a series of seminars nationally and locally.

One area of close cooperation with overseas institutions has been in the running of ITCs: over half of them in the review period have been organised on a collaborative basis with other organisations. These include the regional offices of UNESCO, with institutes with partnership agreements and with other institutions in almost all regions of the world.

It is not clear therefore in what way the partnership scheme has provided a real focus. There are probably more cases of in-depth cooperation with partner institutions - but it is not apparent whether this is because of the partnership scheme or for other reasons such as history, the inherent strength of the institution, the accident of a contract or some other chance event. There are several partner institutions which never seem to be mentioned in the IIEP reports and where it must be assumed that the partnership is inactive. Overall, therefore it has not been possible to operationalise the partnership agreements in a systematic way.

9.4 Training of Trainers

As has been noted in section 3.1.4.1.1, 23% (63 students) out of the 279 who attended the seven sessions of the ATP from 1989/90 to 1995/96 came from training and research institutions: according to the tracer study, 11% of the total sample came from institutions teaching and researching in the sphere of educational planning. (See Appendix 15) The proportion is thus considerably higher than the 7% who came from training and research institutions in the mid-1980s, but remains small. Nine were from those which by the end of the period had signed a partnership agreement. This does not point to the new emphasis on partnership agreements having been at all strongly reflected in recruitment to the ATP, and it was suggested to us that one reason was that governments tend to give preference to their

own staff in applying for, and allocating, fellowships.

Data on the individuals attending the Visiting Trainees (VT) and the Visiting or Research Fellows (VF) programme is available from 1990 (VF) and 1992 (VT). During this period, VTs were able to attend ATP modules, though in later years a fee to recover costs has been levied. The figures for those from teaching or research institutes and universities (other than from developed/OECD countries) are given in Table XXIV:

Table XXIV Source of Visiting Trainees and Visiting Fellows

Year	Visiting Trainees			Visiting Fellows		
	Total from institutions	Of which, partner institutions	Total of all VTs	Total from institutions	Of which, partner institutions	Total of all VFs
1990	-	-	-	3	0	3
1991	-	-	-	3	1	6
1992	0	0	8	2	0	16
1993	4	2	16	1	0	13
1994	3	0	16	7	0	44
1995	8	1	27	6	1	19

Note: 'Total from institutions' includes those from partner institutions.

There is an increase in the number of visitors from teaching or research institutions over the past few years though very few come from the partner institutions.

We only had detailed information about attendance at ITCs for the case-study countries. In Zimbabwe, there were few members of the partner institution who went on ITCs. Most of those who did attend worked at the two education ministries. In Tanzania, 19 out of 22 participants in ITCs were from government ministries: two of the remaining three were from universities, but neither individual was involved in training in education planning or management. In the case of India, the opposite was true - NIEPA staff attended more ITCs than did staff from any of the education departments.

There is thus some evidence that the introduction of the partnership programme has been accompanied by some increase in attendance at the short-term training programmes of IIEP. Although, as noted at the beginning of this section, there has been an increase in attendance at the ATP from the training and research institutes, there has been none during the 1990s. This of course reflects preferences in the sending countries as well as the acceptance decisions by the Institute.

Perhaps there should be a serious study of why there has not been more change in the source of those attend the ATP since the end of the 1980s. Given IIEP's stated commitment to the training of trainers, it cannot be seriously suggested that IIEP is dragging its feet in encouraging the localisation of training in developing countries by sharing its professional expertise with its overseas partners. So is the problem that IIEP has not marketed its courses (ATP and VT) effectively to the national training institutions? How is the problem seen from

the point of view of the staff of such institutions? Is it the case that they aspire to attend the ATP, but cannot get nominations or scholarships? Do they apply but not meet the IIEP criteria? Is the problem, rather, one of arousing their interest, given that the ATP does not obviously have any stream or module aimed specifically at the professional, staff development, needs of trainers? Or is it that a programme in a non-university institution, and one which does not carry any recognised academic award on successful completion, is liable to seem uninteresting to an ambitious academic, who may already have a masters or doctoral degree? How exceptional, indeed, are those who apply for the ATP when they already have good academic qualifications? No doubt the answers to some of these questions would shed light on ways to address the challenge.

9.5 **Networks in Africa and Asia**

A complementary approach to empowering institutions in the less developed countries is being developed. Two networks have arisen in the past few years.

The Asian Network of Training and Research Institutions in Educational Planning (ANTRIEP) was born as the result of a research programme in a number of countries in Asia (see section 8.3 above). At a meeting to present the results of research, it became evident to those present that much could be gained from working together. There is every reason to believe that this network will develop because, although it has the important support and participation of IIEP and a number of the institutions have a common interest in the research project, the members feel that it is autonomous. Although all the six IIEP Asian partner institutions have been invited to join, only two of them became founding members of ANTRIEP. A third, a regional institution, thought it inappropriate to be a founder member but has now joined.

The other regional network which IIEP has been instrumental in setting up is the Southern African Consortium for Monitoring Educational Quality (SACMEQ). This also emerged from a research project but it is different from ANTRIEP in that it is a network of education ministries (see section 8.3 above). The local ministry professionals who were involved in the original research saw the benefit of monitoring educational quality on a regional basis and were supported in this by IIEP.

What is important about both of these networks is that they are clearly grounded in local needs but would not have developed when they did, or even at all, without the involvement of the IIEP. The very real feeling of ownership by the local members is impressive and shows how skilful and sensitive the approach has been by the Institute. It will be of interest to see how they develop when the present research projects come to an end.

One of the major difficulties facing both networks is to raise the necessary resources to support a small secretariat. In general, it is difficult to fund multilateral initiatives of this kind.

9.6 **Conclusion**

Institutional development, including training of trainers, is one of IIEP's four key strategies for achieving the objective of the Sida-IIEP co-operation programme of 'strengthening their (developing countries') national capacities for planning and managing sustained development of their educational systems'. In some ways it is the most important strategy since it attempts to build capacity in the environment where that capacity will be used.

At present the strategy appears to be very restricted in its application and requires considerable elaboration if it is to respond more fully to the challenge and opportunity that IIEP faces as the international leader in its specialised field. Institutional development in IIEP's area of competence would presumably involve support for the planning machinery of governments and education institutions, for professional associations, and for education and training institutions. As far as we could understand, the term is presently being applied to the last of these only and to focus on partnership agreements with selected institutions (and less formal association with a number of others) in various parts of the world, support of the ANTRIEP and SACMEQ networks, preparing some IIEP materials for wider distribution, the depository library scheme, and an element of 'training of trainers' in IIEP's teaching programmes. We were not aware of any broader effort by IIEP to survey provision and prepare directories of training institutions in education planning and management in developing countries (we understand the last attempt - in the 1980s - was never finalised), to issue guides to training materials in the main world languages, or to convene regional meetings to exchange experience of teaching methodologies and promote the sharing of case-study and other teaching materials. Nor apparently is IIEP's Documentation Centre given any mandate to engage in technical assistance activity with its counterparts in developing countries.

Similarly our efforts to understand what IIEP meant by 'training of trainers', which we would ourselves would interpret as staff development for those conducting training and research in institutions specialising in educational planning and management, elicited a somewhat vague response that we should base our interpretation on what was included in IIEP budgets and reports under that heading. If there is a clear and comprehensive policy statement in this area, we did not succeed in finding it. Sometimes 'training of trainers' seems to be used as a synonym for 'institutional development' of which technically it is but one important component. Although staff development is included as an element in the partnership agreements, there do not appear to be specialised offerings among the ATP modules which focus on the needs of those who are trainers in educational planning and administration. Nor have the ITCs and seminar series given much attention to staff development requirements.

The consequence of this seems to be that while the impact of the institutional development programme may be positive for the few institutions that are a part of the networks, the many other institutions engaged in teaching educational planning and management skills are largely out of contact, unless they happen to be members of the depository library programme, or are sporadically involved in seminars or workshops. Recognising that IIEP's own resources are limited and that it can only be a long term process, can it find ways of producing an even greater 'multiplier effect'? Perhaps in the next phase of development special attention should be directed to consideration of how IIEP's range of services and publications could be developed to extend more support, by way of practical services, materials and guidance, to these professionals and institutions.

CHAPTER 10

PUBLICATIONS AND DISSEMINATION

10.1 Introduction

The first aim of the Institute is to 'promote instruction ... in educational planning ...'. The means by which it makes contact with, and thus gives information and instruction to, the largest number of people possible is through its publications and dissemination programme. This has been described in some detail in section 3.1.4.5 above.

Apart from reviews of IIEP publications, the consultants are not aware that any evaluations are available on this part of the Institute's work.

10.2 Sida funding agreements

The 1990-92 Sida agreement lists under 'Dissemination - Information, dissemination and documentation' a number of items, including seminars and the Fundamentals of Educational Planning series. The attached financial agreements for the three years following show that a sum of US\$60,000 per year (total US\$180,000) was contributed under the heading: 'Dissemination'. The next agreement for January 1993 - June 1994 goes into much greater detail, mentioning a number of initiatives including establishment of a network of depository libraries, an interactive network, the IIEP Newsletter and the Fundamentals series. US\$60,000 was provided for dissemination for 1993. The July 1994 - June 1996 agreement puts the dissemination activities of interest to Sida under the heading 'Training Materials'. It refers to continued support to the Fundamentals series as well as the intention to produce training material for general distribution. The financial statement provides for US\$65,000 for new titles in the Fundamentals series, and US\$39,000 for the production of teaching material over the two year period.

10.3 Publishing programme

The annual output of new publications has fluctuated since the beginning of 1990 with no discernible trend. English is the basic language. During the 1990s, on average two new titles per year in the Fundamentals series have appeared in English and French.

The preparation of teaching materials has taken longer than estimated. The material is tested at the ATP and the ITCs. IIEP also intends to ask some of the partner institutions to test the material as well. However progress is slow. Eight modules on quantitative research methods are being given their final validation at an ITC in Cyprus in October 1996, after several years of development.

The bulk of the material from the Institute consists of research and case-study reports, and proceedings from the Institute's seminars and some ITCs. Obviously the Institute controls what it publishes - the 1990 Report of Activities commented that a report on the computer industry in Brazil was judged too weak to issue. We scanned the review section of 11 of the major journals in the field of educational planning, administration and policy. We obtained 17 reviews (in some cases, more than one for an individual book) which were on the whole favourable to the items being reviewed. The majority of the reviews were of IIEP publications rather than of documents, and were of ones written by the senior members of IIEP staff or by commissioned authors of international repute. This is positive evidence of the quality of at

least a proportion of IIEP's written output.

10.4 Distribution

Distribution of the Institute's publications and documents requires publicity and arrangements for supply to the target countries. New publications and documents are briefly mentioned in the IIEP Newsletter. They are also listed in the IIEP catalogue. We heard comments that the catalogue was not particularly easy to use in terms of quick identification of new publications. Perhaps because of its size it was not widely distributed in the case-study countries. It could usefully be redesigned, made more compact and distributed more widely.

All of the material listed in the catalogue carries a price tag. This poses a serious problem in less developed countries because of limited availability of foreign exchange and the bureaucratic procedures for obtaining the necessary funds. The Institute's books can be paid for with UNESCO coupons which can be bought in local currency. However this is not referred to in the IIEP catalogue and no one in the case countries mentioned it to us. Alternatively, former ATP and ITC students can obtain them free of charge. The tracer study found that 26% of former ATP students had made at least one order for free publications in the 1990s, but many of those we interviewed (both ATP and ITC) were unaware of this facility and they could usefully be informed of their entitlement. A number of people mentioned publications that would have been of value to them. The tracer study showed that two thirds those who did obtain IIEP publications found them of value. Although IIEP's depository library scheme (see below) ought to be able to meet many such needs, not all potential users have libraries within reach or aware of them even if they are.

10.5 Depository libraries

It became evident in the late 1980s that libraries which in the past used to order IIEP publications, were no longer doing so. In 1990, 59 libraries in seven countries of Africa were visited by IIEP and the lack of IIEP publications was confirmed. There were several reasons: the general deterioration of the economic conditions in the countries concerned, leading to severe reductions in the library budgets. This was compounded by the lack of foreign exchange and the bureaucracy involved in obtaining what little foreign exchange there was. Consequently, IIEP decided to identify libraries and documentation centres to which its publications and documents could be sent. By the time of our own evaluation, 180 libraries had been identified and were receiving the material. The largest group, over 50%, is in Africa.

As indicated in the case-study reports, the two consultants made a particular effort to visit or contact the depository libraries in the countries they visited. The results were mixed. The material was received and used in three of the four Zimbabwean libraries and in the only library it was possible to visit or contact in India. There seemed no evidence of any of the material having arrived at the fourth library in Zimbabwe despite regular dispatch from IIEP over the past four years. The one library in Tanzania which received and displayed the books was not used and is about to be closed down. In another six Tanzanian libraries, the books had either not been received, had not been unpacked, or were for some other reason, not evident on the shelves. Thus in only four libraries out of the 12 with which we were in contact, is the system operating as intended. Where it is not working, this is due either to the publications getting mislaid or lost in transit, or to staffing problems. The position was particularly unsatisfactory in Tanzania.

The Institute is well aware of the problems, many of which it is not able to directly deal with. One of the major difficulties is the lack of trained librarians and IIEP has tried hard to mobilize German agencies to train staff of the designated libraries. We understand that it is the intention of the Institute to make a full evaluation of the depository libraries next year. We recognise (as IIEP does) that there will always be some wastage, but the aim must be to limit it.

We would also support the concept, enunciated at the start of the scheme, that there should be differential distribution. For example, it might well be sensible to distribute generalist books, such as the 'Fundamentals of Educational Planning' series and reports which specifically deal with the receiving country, to a wider range of libraries such as those in colleges of education and, in India, the District Institutes of Educational Training. The whole collection would then only be sent to a few major national, and competently run, libraries. Some means of regular monitoring is also important. Possibly some sort of simple annual return - a brief one-page questionnaire - might be appropriate for this.

It seems surprising that the IIEP Documentation Centre in Paris is hardly involved in the scheme if its aim is to improve accessibility of materials on education planning and management. Its expertise in cataloguing and regulating availability of library stocks, its access to bibliographic information and data bases, are a resource which some of the depository libraries could tap into. An increasing number of libraries are on Email - two in Zimbabwe and two in India - so that communication would be rapid and cheap.

10.6 The IIEP network and the 'IIEP Newsletter'

One of the strengths of the Institute is its worldwide network of former trainees. The basis of this network is the former ATP students along with those who have been on ITCs. The IIEP Newsletter is aimed specifically at this group, which comprises almost 5,000 people. Names are added regularly to this database from a questionnaire. A serious attempt is made to keep the database up to date when staff travel, through UNESCO national commissions, etc. The level of success is shown by the fact that of the 1,100 who have attended the ATP since the 1960s, 700 are still on the distribution list for the Newsletter. A second group of about 4,000 recipients of the Newsletter consists of those who have attended ITC or who have been VTs or VFs in Paris.

Keeping the database and address list up to date requires the full-time work of one staff member. The information is kept on the UNESCO mainframe computer, which provides very rapid envelope addressing for the Newsletter. However the system is extremely user unfriendly and is very difficult to manipulate for other IIEP purposes.

There is no doubt about the importance and difficulty of this operation. In 'The Power of Change', published by the British Overseas Development Administration, the need for follow-up of students who had studied in the UK was emphasised. One British university which sends one newsletter per year to its alumni abroad was highly commended (R. Iredale 'The Power of Change' pg 20 1992 ODA (London)). IIEP's success is considerable by comparison.

The consultants suggest that those who have attended ITCs as resource persons, who have attended seminars or who have been researchers on IIEP projects, should also be placed on the database on the same basis as those who attend the ATP or ITCs.

The reaction to the Newsletter of those who receive it is almost unanimously positive. Of those who answered the ATP questionnaire 93% said it was useful (54% very useful). Of the 35 people who answered this question on the ITC form in the case-study countries, 24 found it 'very useful' and eight more said it was 'useful'. In interviews readers said the Newsletter made them feel that they were in contact with what was happening in their field in the world as a whole, even if the topics were not of direct relevance to them. It is of interest that the NIEPA Newsletter and the newly started ANTRIEP Newsletter take the IIEP Newsletter as their model.

The tracer study also explored the degree of contact between former ATP trainees and both IIEP and other ATP graduates. It records 96% have some form of contact with IIEP, 64% corresponded with members of IIEP staff, 62% had occasional contact with them during missions, and 60% had contacts with former ATP participants who came from countries other than their own. The last of these is a particularly striking phenomenon and was to some extent replicated even in the case of ITC participants.

10.7 **Efficiency**

The Publications section appeared to the consultants to be run in an efficient manner. The print shop is able to do a wide range of printing jobs including spot colour printing (but not full colour) and able to do long runs (nearly 10,000 for the Newsletter). It can also do very short runs from a computer-controlled photocopying system which enables the unit to supply printed material to order, rather than having to keep large quantities in store.

The dispatch of the Newsletter is through a courier company which posts at the local rate in the country of receipt, thereby avoiding very high air-mail rates from Europe or long transit times by surface mail. Although the problems of post and carriage of goods are endemic in the less developed countries (and not unknown elsewhere), those interviewed in the case-study countries commented on the speed with which orders for books were usually dealt with. There remains a problem that some publications simply do not arrive and the recipient is not aware that they have been sent.

10.8 **Finance**

The consultants did not do a full study of this aspect. As noted in section 3.1.4.6.2 above, Dissemination takes about 17% of the expenditure in cash. The income from sales of publications is negligible, but this in part reflects a conscious decision of the Institute not to charge the main group of recipients at whom they are aimed. The distribution agency for the publications is UNESCO and the direct cash return to IIEP small. Since UNESCO's financial contribution to IIEP is a major source of funding for the dissemination programme, it is not unreasonable for most of the revenue from sales to go to UNESCO so long as there is no disincentive effect on IIEP in relation to 'pushing' sales.

The consultants obtained a sample costing of one the recent 'Fundamentals of Educational Planning'

	US\$
Author's contract	1,600
Translation (33,900 words)	3,798
Printing (English version, 115 pages, 2,500 copies)	3,141
Printing (French version, 124 pages, 2,000 copies)	3,050
Staff time (Senior officers, Junior officer, secretarial)	21,804
Programme support costs	8,303
Total	41,696

At first sight this cost structure appears to be badly distorted. The Fundamentals series stands or falls by its interest and quality, and the contribution of the author to that end is overwhelmingly important. It is hard to believe that the very best potential authors can, at least in the majority of cases, be persuaded to write a text of 30,000 or so words for US\$1,600. Other authors have recently been offered US\$1,000. Within a budget of US\$40,000 for a publication, it ought to be possible to pay the author at least 10% (US\$4,000) and perhaps more.

The cost of producing each copy is US\$9. The distribution costs (which include the many complimentary copies necessary to advertise the publication) are in addition. If it were to be distributed on a commercial basis, the selling price of a Fundamentals volume would be at least three times this figure. In fact this particular volume is being sold by IIEP and UNESCO for 50FF or US\$10. Of course, if there were to be a run on, the costs would fall dramatically as the only major cost would then be the printing and distribution.

CHAPTER 11

IIEP AS A DIALOGUE PARTNER OF SIDA

Our terms of reference point out that one informal role of IIEP is as an important dialogue partner for Sida's Education Division, and we are asked 'to consider the overall impact of IIEP internationally, and in particular on Sida's Education Division'.

We have already described briefly the mechanisms of Sida support to IIEP and the importance of these contributions in a material sense. For the six years 1990 to 1995, the Sida contribution to IIEP of US\$3.936m accounted for 39% of voluntary contributions to the Institute over that period (US\$9.994m), and Sweden provided the largest individual voluntary contribution in each of those years. Sweden contributed roughly 13% of total cash income, and 8 % of the total resources in cash and kind, received by IIEP between 1990 and 1995.

Beyond the material and financial relationship is an important professional one which takes place in various settings, some more formal than others. A characteristic of Sida, among the various bilateral agencies, is that it has had a strong professional group concerned with education. This has resulted in the formulation of rather well articulated policies and approaches to education development issues, and has helped to make Sida a particularly valued dialogue partner of the Institute.

This professional co-operation is manifested in various ways. First, there are the regular meetings to negotiate or review the co-operative agreements which are the focus of this evaluation report. These occasions involve not just working through lists of specific programmes and projects for Sida support, but also an exchange of views on strategies and thrusts in IIEP's work and a process of mutual education. The congruence of aims and interests in the programmes of Sida and IIEP perhaps owes something to these exchanges of view. One should not exaggerate the extent of this convergence however: for example Sida's concern with gender in education finds much paler reflection in IIEP's own programmes

Second, Sida is able to take advantage of IIEP professional expertise to critique its own policies and proposals. This was done most notably in the recent period when Sida was preparing its policy document on support for basic education and educational reform, and received useful commentary from IIEP staff. Sida can feel comfortable in confiding in IIEP given that the latter is not in any sense a competitor in the 'aid game', and yet its involvement in UNESCO's councils and its strategic role in various donor and developing country groupings makes it an invaluable informant on new developments and trends. Its usefulness as a professional partner and agent for Sida is evident in the co-operative projects and contract work in which IIEP has participated with Sida.

A further role has been in education and training. Advantage is frequently taken of meetings to review the agreements to hold seminars for Sida staff on contemporary issues and IIEP work in progress. Sometimes IIEP has mounted short training programmes for Sida staff in Sweden or has taken a staff member on attachment for a brief spell in Paris. The frequent involvement of IIEP in Scandinavian professional conferences under the sponsorship of Nordic Association for Education in Developing Countries (NASEDEC) provides a further opportunity for valuable interchange.

More should not be claimed for this relationship than is represented by reality. It appears to us to be useful but not central to the Education Division's work. Probably Sida's relations with its Nordic partners (Danida, Finnida, Norad particularly) are more influential on policy than the link with IIEP, and Sida also engages in many other forums. But for both parties to the relationship it brings a valuable extension of their insights and knowledge and helps to connect them to the world of thought and action in education development from different perspectives.

CHAPTER 12

THE OVERALL IMPACT OF IIEP INTERNATIONALLY

12.1 Introduction

Our terms of reference ask us to 'consider the overall impact of IIEP internationally' and also to address the matters within the terms of reference 'holistically so that the more general impact of training, research and dissemination activities in educational planning internationally can be taken into account in the findings of the evaluation'.

In Chapter 2 we indicated that one could usefully consider IIEP's impact internationally in terms of three groups of clienteles. These were governments and institutions in developing countries; the international professional community in educational planning and management; and international co-operation agencies. In respect of each of them it is possible to identify services supplied by IIEP to the different constituencies, and to make inferences from the willingness and appreciation with which they are received. This is not of course a fully satisfactory proxy for measuring effects in terms of changed behaviours and increased capacities in educational planning and management. We have also relied on evidence drawn from questionnaires and written enquiries and from interviews in case study countries and among certain co-operation agencies.

12.2 Impact on developing countries

In terms of developing countries there are a number of indications of the extent of IIEP's reach. For example the 1,115 ATP trainees have come from a total of 148 countries, of which all but 30 can be classified as developing countries. IIEP is now supplying 180 depository libraries in 85 countries with its publications. The Institute has a network of some 5000 former trainees from the Annual Training Programme and Intensive training courses with whom it is in touch. The IIEP 1996 catalogue of publications in print contains studies on 80 developing countries.

Our own case studies in India, Tanzania (both Mainland and Zanzibar) and Zimbabwe, certainly confirm the pervasiveness in some countries and institutions of IIEP's influence and contribution. We encountered significant concentrations of staff in the education ministries in Tanzania (mainland and Zanzibar), in Zimbabwe (in both education ministries) and at the National Institute of Educational Planning and Administration in India who had attended the Annual Training Programme or ITCs or who had professional contact with the Institute in other ways.

Such clusters and networks in the countries of the South, which IIEP takes considerable pains to maintain and develop, were mentioned to us by external commentators as one of IIEP's greatest assets, and a resource on which others could also draw when seeking partners for co-operative work. Indeed the closeness and ease of IIEP's relations with developing countries, which was evident to us in conversations with senior government personnel in the case-study countries, is manifested on the occasion of debates in the Education Commission of

UNESCO's biennial General Conferences where IIEP's programmes have generally attracted strong approval and support from representatives of developing countries. It appears to be one of the factors that has led to IIEP being chosen as the base for DAE and IWGE.

It was certainly noticeable in Tanzania, where admittedly IIEP has had a particularly intensive collaboration in the past, that IIEP's preparation of education planners and continuing contact with them, has helped to give a sense of professional identity to educational planning. It does seem probable that the existence of the Institute has served more generally to raise the standing and prestige of educational planning and planning organisations in the developing world. It also appears to be the case that IIEP's approaches to educational planning have helped to shape the intellectual framework of the subject, particularly on the side of quantitative analysis and, for example, techniques associated with school mapping.

Because of the low level of income in developing countries and the availability of external assistance, it is problematical to put IIEP's services to developing countries to any 'market test' as a way of assessing their value to clients. IIEP tries to serve the less affluent countries and has found it necessary to circumvent market blockages in relation to publications, for example, by establishing the depository library programme and making its publications available free to personnel from developing countries. The level of uptake for IIEP's 'free' publications is less than might be expected, but this does not necessarily reflect badly on their usefulness, given that demand is partly a function of user awareness and that information channels are often clogged. There is a strong demand for places on the ATP courses and a healthy level of requests for IIEP technical assistance. These come to the clients for a low outlay on their part: they are not of course completely 'free' to the recipient because of the need to forgo the services of trainees and to find counterpart costs for technical assistance. We are aware of only a few middle-income countries which are willing to spend their own financial resources on purchase of IIEP services and publications on any considerable scale.

12.2 The international professional community

Comprehensive assessment of IIEP's impact on the international professional community is outside the scope of this evaluation, and beyond the resources at our disposal. We can only offer limited comment based on our own observations and the exchanges we had with several leading but not necessarily wholly representative professionals.

We found that the Institute was well known among those who are concerned with educational policy and analysis, planning and management in developing countries. There was a wide awareness of the Institute's existence and role and of its publications programme. The Documentation Centre was a valued resource to which many professional directed enquiries. The major IIEP publications came to their attention through notices in international journals or through the IIEP Newsletter.

IIEP's influence is generally held to have been particularly substantial in the early decades of the Institute's existence. In those days it was a pioneer in opening up a new domain of professional work and had something of a monopoly position in training and studies in educational planning, but the situation is now very different with universities, colleges and training institutes active in many parts of the world so that IIEP's profile is inevitably less dominant. It is true that the once powerful units in UNESCO dealing with studies and policy

analysis, and the subsequently-established finance and planning department, now no longer exist, and that because of the financial constraints on UNESCO headquarters and its regional offices IIEP has had to play a larger role in the framework of UNESCO. But on the wider stage the financial resources and technical capacity of the World Bank in particular have been greatly in excess of that of IIEP. (At the moment of writing it is uncertain how much of that capacity, following recent reorganisations, will remain.)

With the passage of time, therefore, and the expansion of training, research and consultancy in education planning, IIEP's own contribution has naturally become more diluted in many places and graduates from other institutions are playing an important role alongside those with IIEP connections. But respect for IIEP remains high and it is often the first institution to which governments turn for professional advice and assistance; its publications and training materials are in demand by students in training institutions in developing countries. The conclusion we draw from this is that IIEP's influence on the profession remains great, even though it has probably declined in relative terms because of the proliferation of programmes of training and research in educational planning. This is in part due to the success of its own earlier work.

Any direct comparison with the programmes in research and training of other institutions would in any case have to take account of the fact that the Institute has never claimed, or aimed, to be an academic institution, concerned mainly with developing theory. It has always seen its studies and publications as rooted in practice and empirical experience. They are designed to contribute to its training work and to assist policy development and education planning applications in developing countries.

12.3 Impact on international co-operation agencies

IIEP has enjoyed the confidence of many bilateral and international agencies. Several, particularly but not only the Nordic countries, have shown this confidence by making voluntary contributions to IIEP's budget. Many agencies see IIEP as one of UNESCO's most effective activities and regard support for the Institute as an effective way of demonstrating their commitment to UNESCO itself. The cordiality of IIEP's relations with developing countries is also cited as a major reason, together with respect for IIEP's professional contribution and its conveniently central and accessible location, for the international community agreeing that the Institute should provide the administrative base for the Association for the Development of African Education (DAE) and the secretariat for the International Working Group on Education (IWGE).

Both DAE and IIEP draw advantage from their co-operative arrangement. DAE benefits from the use of services and administrative facilities that would be expensive to provide for itself if it was a self-standing organisation. Location at IIEP and in proximity to UNESCO provides it with access to a wide range of colleagues, contacts and visitors and to useful documentation services. The fact that the donors in membership of DAE have multiple contacts with IIEP, and in general a high regard for it, is a further advantage. IIEP is working on several of the themes covered by DAE Working Groups. Reciprocally, IIEP finds its range of contacts enhanced by the presence of DAE's Secretariat, and benefits from the frequent gatherings of donors who are also in many cases its own financial sponsors, as well as of ministers and senior officials from Africa. It participates in one or two of the DAE Working Groups and at

the same time gets an exposure to other areas of professional work affecting Africa. The external Evaluation Report on DAE in 1994 recorded that 'the links with IIEP are generally viewed positively'. On the understanding that, aside from its role as host, IIEP's membership is on exactly the same footing as that of other members and that the Association operates in a completely democratic and transparent fashion, the current arrangements seem to command support. This is without prejudice to the question of whether there should be a move at some future time of the Secretariat to Africa.

In respect of the International Working Group on Education (IWGE), for which IIEP provides the secretariat, there was also general appreciation of IIEP's role in performing this service, convening and organising the meetings, and acting as rapporteur and publisher of proceedings and reports. Those who remember the origins of IWGE in the 'Bellagio Group' of twenty or more years ago, convened by the Ford and Rockefeller Foundations, comment that IWGE has become rather large, somewhat divorced from the real decision-points on co-operation for development, and lacking in an authentic identity distinct from those other groups meeting on Education For All, DAE etc. Those who identify such shortcomings in the machinery, recognise that any deficiencies must be laid at the door of all the members, even if IIEP has a particular leadership role and responsibility to work with others to impart a new dynamism to the Working Group.

Some agencies also attach particular importance to IIEP's role in sustaining pluralism of thinking on international education policy issues, acting as both complement to bodies like the World Bank and source of alternative counsel. With the collapse of communism, the danger of conformism with international fashions in educational analysis and prescription is even greater than before, and the value of parallel centres of research and comment commensurately greater. A number of our informants considered that IIEP, as a non-donor and a confidant of developing countries, was in a position where it could play a valuable role in this respect.

PART D CONCLUSIONS

CHAPTER 13 A SUMMARY APPRAISAL

It is time to pull the strands of this evaluation together. At the outset we explained the limitations of our work and that it was bound to be somewhat impressionistic. We have tried to respect and reflect the evidence given to us, but we fully accept that a longer and deeper exposure to our subject matter might have modified some of our conclusions.

Our primary task was to evaluate Sida support for IIEP in the last three agreement periods between 1990 and 1996. It was not to evaluate IIEP itself. Nevertheless we would like to record our sense of admiration for the institution and what it represents. We have been impressed by the commitment, industry, and professionalism of the staff, the excellent morale within the organisation, and the high regard in which it is generally held by its partners in development work and more importantly by the great majority of those whom it exists to serve, primarily in developing countries. As in most organisations, some unevenness in quality of products is found, posing the perennial challenge to those responsible for supervision to ensure that the quality of all the products approaches that of the best: a best which in the case of IIEP - across the range of teaching, research and dissemination - is wholly admirable.

IIEP's record is a notable one in the context of the experience of UN institutions generally in recent years. It is all the more remarkable when one considers that IIEP's resources had reached a rather low ebb at the beginning of the 1980s. As it is, the Institute has even found it possible to expand its programme activities in the 1990s, the period to which this evaluation relates. For the Institute to have recovered so strongly, in a period when other institutions have been losing support, and when its parent institution UNESCO has suffered the haemorrhage of the departure of the United States and Britain from membership, is something of a triumph. It owes much to strong leadership internally, and to the way that UNESCO in spite of its own difficulties has kept faith with the Institute, providing it with the bulk of the resources required. At the same time the Institute itself has shown entrepreneurial drive in diversifying its resource base, and this has been one of the foundations on which the expansion of its programme of activities has been built.

IIEP's achievements have also depended very much on the confidence shown in it by governments. They have furnished IIEP with essential resources. Their contributions have been crucial not only to the scale of operations, but also from a qualitative point of view, by feeding important perspectives into IIEP's work and helping to expose it to the professional thinking among donor agencies. Their voluntary contributions give IIEP a measure of flexibility and a degree of autonomy that it could not enjoy if it was entirely dependent on UNESCO for its funding. The diversification of its sources of revenue has been one precondition of whatever IIEP has been able to achieve.

Our terms of reference ask us to consider the extent to which IIEP has fulfilled the overall objective of *promoting effective educational planning in developing countries by strengthening their national capacities for managing sustained development of their education systems*. In particular, we are asked to consider the extent to which the objectives

established for the sub-components of Sida support have been attained, the relevance of the activities to the achievement of the overall objective of the agreement, and the efficiency with which the various sub-components have been carried out. We are also charged with assessing the impact of the training activities in Sida programme countries, and of IIEP itself both internationally and on Sida's Education Division.

13.1 Extent of achievement of objectives

In broad terms the objectives laid down for the various sub-components of the agreements have been achieved. This is well illustrated in relation to the specific activities which Sida agreed to finance under the most recent agreement (Table XV): they have been carried out subject only to occasional delays. In so far as the objectives of the agreement relate to IIEP programmes more generally, and not just the Sida-funded components, in a few instances there has been postponement of activities, or late completion and publication of documents. The area where the gap is widest between intention and realisation is in institutional development and the training of trainers where original intentions for the development of the partnership programme did not proceed fully in accordance with hopes and expectations and some change of direction has consequently taken place. The general picture is, however, one of fulfilment of objectives set.

13.2 Relevance

One of the strengths of IIEP's programmes is their closeness to developing-country realities and this is a reflection both of the intensive contact IIEP maintains with UNESCO member countries, the increasing involvement of IIEP staff members in technical assistance work for UNESCO and others, and the fact that in its research and studies the Institute is mostly working with and through developing-country nationals and institutions. In general the training and studies programmes are firmly rooted in the actualities of developing countries and are related to real-life situations rather than to abstractions. IIEP courses are a good deal more practical in both content and in pedagogical approach than those in most universities and colleges teaching educational planning and management elsewhere.

As regards training, the findings of the country case studies in India, Tanzania and Zimbabwe and of the tracer study reveal a considerable degree of satisfaction among former trainees with the courses in terms of their perception of its usefulness to themselves in their work and to their country's situation.

A complete assessment of the relevance of the programmes would examine their relevance to the trainees in terms of their professional needs. This requires a fuller picture than we have been able to assemble of where the trainees are 'coming from' in terms of their previous education and experience. The ATP trainees appear to be rather a heterogeneous group in terms of previous experience and background, and so it is not easy for IIEP to make the course fully appropriate for each and every trainee. Information on their backgrounds is contained in the application forms for the ATP course, and it would be useful to match this with trainees' perceptions, recorded in the tracer study, of the usefulness of the course to them, so as to verify that the core elements of the course are essential for every trainee and that the material does not duplicate what many of them have already learned in other contexts. Certainly for the many trainees who had started life as school teachers it was probably important to gain an understanding of the relationship between education the economy and

employment, and to learn to think of education and training as a system of interrelated parts.

A particular challenge is posed to IIEP and the structure of its training programmes by the fact that the requirements for educational planners are becoming increasingly diversified and specialised. The present programme of the ATP is designed for national-level resource planners rather than for those working at regional, local or school level, or those more concerned with quality issues or the curriculum. It caters less directly for those many training institution personnel whose main needs lie in the area of staff development. Newer specialised concerns are emerging in such areas as decentralised planning and privatisation, or use of new information technologies. It is in the context of these developments, of the difficulty of catering for high-level specialist needs within the framework of the existing ATP, and of the relative expense of running the ATP as a general planning course, that the issue has been raised whether in future the training in Paris might cater for more advanced and specialised needs, with part or all of the core elements in the present ATP being located in developing countries. It would be useful in the medium term for a fresh assessment to be made of the training needs in IIEP's areas of concern to see where IIEP should itself concentrate and which parts of the field it should best leave to others.

The research topics addressed by IIEP do generally reflect national and international concerns, and are mandated within the framework of UNESCO's and IIEP's Medium-Term Plans. To that extent, the content of the research programme has relevance. In terms of actual themes addressed, it can be argued that the research programme is not particularly focused on the practice of planning, or on plan and policy implementation, or on 'strengthening national capacities for planning and managing sustained development'. However the mode of its implementation, working with and through researchers from developing countries, may well be conducive to that objective.

The programme of institutional development and the training of trainers is ostensibly the most directly relevant of all IIEP's programmes for developing national capacities. Much of the effort to date has focused on the partnership agreements and the depository library programme. The limitations of the partnership programme have become apparent: they tend to direct IIEP's attention to a relatively narrow group of institutions, they are time-consuming to negotiate and are heavily dependent on particular individuals. The evidence we have from the case-study countries on the impact of the partnership agreements showed that some, e.g. the one with NIEPA in India, appear to be productive, while others are far less so. The new ANTRIEP network, which is planned on the more satisfactory basis of a genuine network of links, not just bilaterally between a partner and IIEP but also among the member institutions themselves, is too new at this stage to have proved its worth, but offers an alternative model.

Both the partnership and the depository library programmes are based on the principle of designated partners. It is difficult to draw in more than a few of the scores of training institutions worldwide through such mechanisms. The challenge is rather to operate in a more facilitative mode and with more open-ended programmes of institutional support, for example by circulating reading lists in educational planning and management, by expanding publishing of materials available for any institution to adapt and use, or by developing independent study modules for staff development in educational planning and management. Perhaps IIEP will feel

inclined to experiment along these lines as a complement to its other programmes.

13.3 **Efficiency**

This was considered from two points of view, of management and of cost. The training, research and dissemination programmes of IIEP appeared to be generally well conducted, and the very occasional lapse from high standards attracted attention because of its atypicality. Favourable comment was made by trainees on IIEP's careful preparation of training events, and on the speed with which it issued reports. IIEP produces regular and informative accounts of its activities. In general we were highly impressed by the Institute's ability to furnish us with information in the course of this evaluation. The only exception to this was in the area of research workshops, seminars and policy forums where we found difficulty in obtaining consolidated lists, or clear definitions enabling us to distinguish the different categories from each other or from the ITCs. It is understandable that different designations may be attached to the same type of event in order to satisfy local susceptibilities, but when this has implications for IIEP's own administrative practice (e.g. following up 'trainees' but not 'seminar participants') or complicates the Institute's reporting of its programmes it may prove counterproductive. At least an internal report mechanism should be established.

We could not examine cost aspects of IIEP's work in any detail. We encountered no examples of extravagance or obvious waste, and were often made aware that UNESCO rates of remuneration for authors and for consultants were far from generous by comparison with those of some other agencies. Financial control and expenditure analysis seemed to be handled in a most competent manner, notably in respect of the Sida agreements which were our main concern.

The unit costs for training, research and publications through IIEP are inevitably high. Partly this reflects that it is an international institution, located in a high-cost capital city and operating UN-system salary scales which take account of the fact that many employees are expatriates and require various elements of compensation for this in their total emoluments package. Partly it reflects the nature of IIEP as a multi-purpose institution with many different functions - training, research, dissemination, advice, technical assistance, resource centre, international co-operation. The whole is greater than the sum of the individually costed programme parts, but it is the parts that donors are most willing to finance. This can result in a situation where, when costed out, the budgets for individual programme activities appear to carry a high staff and overhead element, which appears all the greater when the cost of 'the action' in developing countries is put alongside 'the organisational and overhead cost' in Paris. The evident contrasts must be a source of concern. We have no reason to believe that the cost levels and costing practice at IIEP is out of line with that of other international agencies. Clearly there should be full transparency in discussions about the pricing of activities which external donors are asked to fund.

13.4 **Impact**

All the evidence at our disposal suggests that the impact of IIEP has been considerable and remains so. It has been described to us as the leading institution in educational planning worldwide, and it clearly enjoys an enviable reputation both among those who have participated in its programmes as trainees or research collaborators, and among donors and developing country governments and institutions.

IIEP has been one of the main originators of the models of educational planning used in developing countries and of the techniques applied. In very many countries there is an influential core of practising education planners and teachers of educational planning who have been trained at the Institute, and whose sense of professional identity and awareness of belonging to a worldwide network of colleagues engaged in the same kind of work has been moulded by IIEP. In the case-study countries we found that the reputation of the Institute stretched well beyond those who had personal experience of its programmes.

Trainees clearly appreciated the opportunity to acquire specialised knowledge and skills. There seems little doubt that their competence is considerably enhanced by their training. The trainees themselves affirmed this and it was also confirmed by others in interviews. One informant who is used to placing consultancy writing and research contracts in developing countries commented on the capacity of former ATP trainees to organise material and write coherent reports proceeding from description to analysis and well argued proposals.

The evidence in case-study countries and from the ATP tracer studies suggests that the majority of trainees do stay in education or education-related occupations and that the training in education planning is not simply a passport to promotion elsewhere. (Even where mobility does take place it is not always clear that the training has been wasted, as our informants in the Tanzania case study emphasised with respect to Zanzibar experience - see Appendix 4). From that point of view the ATP seems to be building capacity. In terms of career development the evidence is mixed. Attendance at IIEP appears to have contributed to the advancement of some people in their careers while a substantial minority of others feel they have become becalmed. In these cases there is often a tendency to believe that their experience might have been different if the ATP carried a diploma award, but this would have far reaching consequences for the programme and IIEP is rightly cautious.

It is not easy to factor out the impact of IIEP from other influences on the situation of educational planning. In many countries the state of the public education system is lamentable. But this may be due as much to economic and political factors entirely beyond the education planner's or even the Ministry's control, as to any inadequacy of planning technique. At the level of the Ministry the position in some countries is that those in authority have their own priorities and have little respect for the perspectives that the educational planner may bring to the problems faced by the Ministry. At departmental level the IIEP-trained specialist is working alongside others who have had different training and is, with them, subject to the authority of senior people who may take a different view of priorities. All these are reasons why even the most proficient graduate of the IIEP may not be able to exert a great deal of influence.

Although it is thus possible to adduce reasons why efficacious training at IIEP may be quite compatible with a somewhat dismal performance of planning in some developing countries in practice, this should not stand in the way of efforts to improve the preparation of planning personnel and, perhaps, to give them more support, for example through refresher courses, after training. Proposals that IIEP training should concern itself more with the 'politics', strategies and techniques of implementation, are relevant to the objective of ensuring that IIEP graduates can put what they have learned into effect..

The impact of research projects varies. We have cited examples from the case-study countries where IIEP studies appear to have had a direct impact on policy. This is more likely to be true of action-oriented research like SACMEQ or an evaluation such as that of adult education in Tanzania. Comparative studies do not always have the same capacity to influence policy unless the lessons are soundly based and the implications are clearly formulated for policy-makers. Constant attention is needed to the objective of ensuring that the products of IIEP research impact on practice and are in a form useful to practising planners and policy makers. One way of approaching this would be to aim IIEP publications more directly at practitioners. Research findings could be issued in more popular formats and shorter 'briefing notes' or 'policy options papers' in IIEP's areas of research might help to secure greater impact.

In terms of institutional development and training of trainers our sense is that the programme is too limited and has not yet met with the success intended. The partnership agreements have not been a fully effective way of developing the partner institutions and some of the agreements seen to have become 'a dead letter'. Responsibility for this cannot be laid solely at IIEP's door because the essence of the agreements is mutuality. However a more proactive approach to staff development within the agreements is called for, and IIEP could usefully put more resources into preparing training of trainers materials and developing staff development modules in the ATP and ITCs. As noted above, the Institute is already in process of reformulating its approaches to institutional development.

To judge from the country case studies the depository library programme has also met with mixed fortunes. The idea seems excellent, but in some countries it has encountered teething problems in the form of non-arrival of materials and lack of library staff to activate the collections.

We cannot easily assess the impact of the dissemination programme of IIEP. The Newsletter certainly reaches most of those for whom it is intended and is greatly appreciated. We are unsure about how widely read are other IIEP publications. We came across education planners in the case-study countries who seemed to be hardly aware that they can obtain the publications free of charge, and others who, though aware, make only limited use of the facility. Contrasted with this are institutions at whose libraries IIEP publications are well used.

13.5 Impact Internationally

Our consideration of the role of IIEP internationally persuaded us that the Institute is well regarded in developing countries and has made a substantial impact there through the network of former trainees, and the research workers and institutions with which it co-operates. Its role as an institution enjoying the trust of developing countries is also regarded as an asset by the international community as a whole. The choice of IIEP to provide the base for DAE and the Secretariat of IWGE is a tribute to its unique position and influence.

IIEP has exerted considerable influence on the establishment of educational planning as a respected profession which individuals are eager to join, and an activity which governments and the aid donors are keen to support. It commands considerable respect as a repository of information, knowledge and experience. Its influence on the theory and practice of educational planning may have declined in relative terms by virtue of the fact that the field has grown so

much; this is in part a tribute to the work IIEP itself has done to build up this area of work.

One of IIEP's most valuable functions internationally is to act as a meeting ground where different experiences can be assessed and compared and where people from different social systems, and from North and South, work easily together in a non-political atmosphere. Of especial significance is IIEP's role as a bridge: a bridge between the industrialised and developing countries, but also a bridge between language groupings (English, French, Spanish, Portuguese, Russian) in its training and research programmes. In these respects it does of course reflect the mission of its parent body UNESCO. While benefiting considerably from its links with UNESCO, it seems clear that IIEP has also helped to enhance UNESCO's own credibility.

13.6 Impact on Sida

The relationship between IIEP and Sida's Education Division has been mutually beneficial in professional terms. Sida support has been a source of enormous strength to IIEP both materially, professionally and politically in the international community. But the benefit has been mutual. Sweden has obtained good value from its support of IIEP in important ways. One of these is through access to IIEP's professional resources, expertise and contacts, which Sida has been able to use in its own professional programmes. Another is in helping to shape IIEP, and by extension UNESCO, policies in areas of particular priority and concern to Sida itself. Third is the esteem which Sweden itself draws from being seen to be a leading and active supporter of a successful institution. In fulfilling this role Sweden has advanced another central objective of its external policy which is to give greater credibility to the United Nations and its associated institutions.

To date Sida's trust has been well rewarded, and the rather open form of its support to IIEP has had its justification. IIEP needs room for manoeuvre if it is to respond flexibly and effectively to the demands upon it. But we believe it would be justifiable in future for Sida to impart even more focus than hitherto to its choice of programmes for support, and to monitor performance more closely.

Two areas of particular concern to Sida, where much remains to be done, are in the area of institutional development and the training of trainers, and of gender in education. We have already directed considerable comment to the former. On the latter we found that IIEP had been slow to accord gender the importance it deserves in the substance of its training and research programmes. Moreover the proportion of females among the trainees is low, and although as explained earlier IIEP cannot control this directly itself, we are concerned that it should develop stronger policies for influencing the gender composition of trainees. To do this it needs to develop statistical collection, presentation and monitoring systems which make explicit the proportion of women participants in IIEP activities. We should not leave this subject without acknowledging the positive steps that have been taken by the present Director to bring about much better gender balance in the Institute's professional staff.

All institutions, even successful ones like IIEP, need to change and adapt. This report on Sida support for IIEP identifies many opportunities and challenges for the Institute if it is to remain fully relevant and competent to fulfill its mission in the decades ahead. A particular challenge for IIEP is that any repositioning of itself to respond appropriately has to be planned and

executed at a time when many senior staff of IIEP are due to retire. Over this crucial period external support for IIEP will be even more necessary, but could have higher pay-off, than ever before. In a world where so much institutional infrastructure is in ruins this 'irreplaceable international resource', as it was described to us, needs to be nurtured and supported as it positions itself to serve the international community in the 21st century.

Appendix I Terms of Reference

Department of Democracy
and Social Development
Education Division
CMN

1996-04-12

**Terms of Reference for Evaluation of the Sida Support to the
International Institute for Educational Planning**

1. Background

Implementation of Sida education support in developing countries is strongly influenced by the quality of the education planners and managers, not only at central level but also in the regions and districts.

The International Institute for Educational Planning, IIEP is internationally the leading institute for training education planners and managers, and carrying out related research, in particular for developing countries. IIEP was founded in 1963 as a semi-autonomous institute within the Unesco framework.

Sida has supported the IIEP since 1969 through a series of 8 agreements varying in length from 1,5 to 4 years. The original agreement, 1969 - 1973 was for 0.8 MSEK per year. There has been a steady increase in the level of funding and the current agreement is for 4,5 MSEK per year. This agreement expires on June 30, 1996 and is proposed to be extended to December 31, 1996.

The framework for the agreements are IIEPs Medium Term Plans, the current plan being for 1996-2001, and the immediately preceding plan covering the period 1990 - 1995. According to the Medium Term Plan for 1990 - 1995, which is the plan covering the main period of activities for this evaluation, the IIEP has three main tasks:

- to train education planners and administrators, mainly from developing countries,
- to carry out research related to the central questions of educational planning, and
- to disseminate new educational planning concepts, techniques and methods to all interested individuals and institutions.

The overall development objective of the programme supported by Sida, as set out in the current Sida/IIEP agreement, is:

To promote effective educational planning in developing countries by strengthening their national capacities for planning and managing sustained development of their educational systems.

The IIEP has a four-fold strategy of closely related activities for the achievement of this objective:

- (i) the international training programme of long duration (nine months)
- (ii) specialised intensive training courses and workshops,
- (iii) applied research and studies, and
- (iv) institutional development, including training of trainers.

The specific objectives for each of these components are set out in the *"Programme of cooperation between the Swedish International Development Authority and the International Institute for Educational Planning (period July 1994-June 1996)"*.

Although the agreements between Sida and the IIEP are set out in terms of the IIEP objectives and strategies, the IIEP has another informal role: it is an important dialogue partner for the Sida Education Division. The IIEP makes a significant, but hard to quantify, input into the policy and methodology work of the Education Division. The IIEP also plays a leading role internationally in the dialogue on educational planning, management and research. The IIEP is the host to the Association for the Development of African Education (DAE) and plays an important role in the International Working Group on Education (IWGE).

2. Reasons for the Evaluation

Sida support to the IIEP has gradually increased so that it now receives the largest single grant from the Education Division's fund for special programmes for innovations and methodological development. The decisions to increase the support have been based upon the annual reports produced by the IIEP, the outcomes of the annual SIDA/IIEP joint review, the high demand for training places, and by the quality and utility of the products of the research which are often used in the development of educational materials for the training courses and seminars.

In June, 1994, an internal evaluation for the period January 1993 - June 1994, was prepared by IIEP for SIDA as an input into the preparation of the new agreement period. The evaluation was

positive to the IIEP activities supported by Sida and did not propose that any major changes should be made.

It was agreed between Sida and IIEP in 1995 that an external evaluation should be carried out towards the end of the current agreement period. The evaluation is of particular importance given the necessity to ensure that special programmes are of direct relevance to the Sida country programmes.

3. Scope and Focus of the Evaluation

Due to the wide range of activities supported at least in part by the Swedish grant, the consultant shall focus on those activities which are part of the strategy for achieving the objectives as set out in the agreements with Sida.

Regarding the evaluation of the activities financed or part-financed by Sida and carried out by the IIEP, the evaluation shall concentrate on the period of the last three agreement periods, January 1990 to June 1996. It should, however, also take into account developments during the earlier periods of support if these are considered relevant to the findings of the evaluation. A longer time perspective might be particularly required in the case of analysing the overall impact of the support in specific Sida programme countries.

The activities on which the evaluation team focus shall be evaluated in terms of:

- the relevance of the various activities to the achievement of the objective of the agreement,
- the extent to which the objectives established for the different sub-components of the programme have been achieved,
- the efficiency, including the cost aspects, with which the sub-components have been carried out,
- the impact of the training activities in Sida's programme countries, as regards educational planning and management, for example in terms of the usefulness of the training received by national specialists for performing their tasks, improvements in their capacity to plan, draw up documents and reports, and facilitate implementation of education policy,

In addition to the impact of the support at country level, the consultants should also consider the overall impact of the IIEP internationally, and in particular on Sida's Education Division.

The above questions shall be addressed to each sub-component of the Sida support but also holistically so that the more general impact of training, research and dissemination activities in educational planning internationally can be taken into account in the findings of the evaluation.

4. Methods

The consultants shall work in close cooperation with the staff of IIEP and will have access to relevant documentation at both Sida and IIEP. IIEP will nominate a member of its staff to facilitate the work of the consultants. The Sida programme officer for the cooperation with IIEP will facilitate the work of the consultants at Sida.

In general the evaluation will be based on information collected from Sida and IIEP through analysis of existing documents and evaluation studies, by interviewing staff of both institutions and, if considered appropriate, interviewing current participants in IIEP programmes. Some key documents are listed at the end of this terms of reference.

As for the impact evaluation, it is proposed that two complementary activities shall be undertaken:

- a tracer study of former IIEP trainees who graduated between 1990 and 1995, in order to find out about their present positions and new responsibilities, their career development since they left IIEP, the extent to which the training received at IIEP responded to their professional needs and the extent to which it has had an impact on their work. The IIEP will handle the administration of the survey instrument and the data processing in consultation with the consultant.
- a limited number of national case studies (maximum 4) on the overall impact of the different IIEP activities (training, research, dissemination), the countries to be selected from those which receive Sida education support. The final choice of these countries will be made in consultation with Sida and IIEP.

The consultants should propose practical ways of implementing these activities and are also invited to make suggestions for evaluating the more informal results of the cooperation between IIEP and Sida Education Division,

Whenever appropriate, gender disaggregated data should be used and the gender aspects integrated into the discussions and conclusions.

4. The Consultants

The consultants should be well qualified in the field of education and development and have experience of educational planning and management in developing countries. The consultant should also have experience of carrying out evaluation studies, preferably including studies of programmes of institutional cooperation, training, and research.

It is an advantage for the consultants to have experience of teaching in higher education and/or training courses in subject areas of relevance for the IIEP evaluation.

Knowledge of Swedish is not necessary.

5. Timing

The evaluation should start as soon as possible and not later than May 15, 1996. It should be completed not later than September 30, 1996, in order to facilitate the negotiation of a possible new cooperation agreement between Sida and IIEP.

6. Reporting

The report shall be written in English.

The draft report should be ready September 1, 1996 and presented to SIDA and IIEP in five copies each. The two parties will comment on the report before it is finalised. The consultant may be requested to present the report verbally at the annual Sida/IIEP review in Autumn 1996. The final report should be submitted not later than October 1, 1996.

The report must have an executive summary and the main text should not be longer than 50-60 pages. All other information should be included in the appendices.

An extra executive summary, prepared for a wider audience, should also be prepared by the consultant for inclusion in *Sida Evaluations Newsletter*.

The final report and executive summary shall be submitted both in paper copy (A4) in 5 copies to Sida-Stockholm and on a discette (WP 6.1 for MS Dos or a compatible programme). The report should be of such technical quality as is required for printing and distribution within Sida.

Appendix II Timetable and people interviewed

June & July 1996 Paris - PW and KM made a joint visit at the beginning of June to IIEP and then each made a separate visit of about one week to Paris to IIEP. All of the professional staff then in post were met, either by the two consultants together or by them separately. The Executive Secretary of the DAE was also met by the two consultants

PW met the following at the head office of UNESCO:

H.W.Risson, Head of Co-ordination and Evaluation Unit,
John Smyth, Education Sector
Dieter Behrstecher, Director, Basic Education

PW met the following members of embassies and delegates to UNESCO:

Mr. J.J.Mhlanga of the Zimbabwe Embassy;
H.E. Prof. Bavu, Tanzanian Ambassador; and
Mr. Mateus, Chargé d'Affaires, Mozambique Embassy

KM met Mme. Michelle Delaygue from the French National Commission of UNESCO

June 1996 Stockholm - PW and KM visited Sida head office to be briefed about the background to the consultancy and the reasons for the evaluation of Sida's support to IIEP.

PW and KM also met Mr. Torsten Husén and Mr. Lennart Wohlgemut, respectively a former and the present chairman of the Board of the IIEP.

The two consultants visited India, Tanzania and Zimbabwe in July and August 1996. The meetings there are described in the case-study reports below.

August 1996 PW met the following in the course of a visit to a number of European countries:

European Commission

Digby Smith, seconded national specialist, Training Policy Group, D-G VIII/7

Germany

- Federal Ministry for Economic Cooperation and Development

Monika Allramseder, technical aspects of cooperation with UN specialised agencies

Susanne Schraa, cooperation in education sector

- German Foundation for International Development (DSE)

Wolfgang Gmelin, DSE

Uto Bude, DSE

Traugott Schofthaler, Secretary-General, German National Commission for
UNESCO, member of UNESCO Executive Board

Klaus Hufner, Free University of Berlin, member, National Commission

Norway

Sissel Volan, Senior Education Adviser, Directorate for Development Cooperation,
NORAD, Ministry of Foreign Affairs
Birgit Brock-Utne, University of Oslo
Anne Welle-Strand, Research Fellow, Department for Training and Development,
Statskonsult, Oslo

Denmark

Poul Erik Rasmussen, Technical Adviser (Education), Danida, Royal Danish Ministry
of Foreign Affairs
Lene Buchert, Human Resource Development Department, COWI-Consult

The Netherlands

- Ministry of Foreign Affairs
H. baron de Wijkerslooth de Weeresteyn, Senior Programme Officer, International
Education Division
Hanke Koopman-van den Boogerd, Senior Adviser, Basic Education
- Centre for the Study of Education in Developing Countries (CESO)
Leo Dubbeldam, Director
Wim Biervliet, Education Specialist
Kees van den Bosch, Education Specialist

Appendix 3**INDIA CASE-STUDY****1 Introduction**

As part of the follow up and evaluation of IIEP, it was agreed to do a case study of one of the Sida partner countries in Asia which received support for its education. India was chosen because it was a partner benefiting from all of IIEP's main programmes: people who had been on the ATP, on ITCs, an institution which had signed a partnership agreement, a number of depository libraries for IIEP books and reports and even some former members of IIEP professional staff and a former Chairman of the IIEP Board. The visit was made by Kees Maxey who was in the country from Sunday 4th. August to early Monday 12th. August. He stayed in the hostel attached to the National Institute for Educational Planning and Administration (NIEPA) in New Delhi. This was the first visit that this consultant had made to India.

The week was spent in meetings and interviews. The consultant's accommodation in the NIEPA hostel was very useful, not only in its convenient location next to the National Institute's offices where a number of people whom he needed to see were located, but also because he was able to talk informally with a number of those attending the current NIEPA course and a newly appointed research assistant. Inadequate access to telephones prevented him from making extended calls from the hostel or the NIEPA offices to interview some of those based outside Delhi.

2 Background

India is the seventh largest country in the world in terms of area and the second largest in terms of population. It has been independent since 1947 and is a union comprising 25 states and 7 Union Territories. The division was made on a linguistic basis and the states vary very considerably in area and population. Thus in 1991, Uttar Pradesh had a population of 139 million and Sikkim of 400,000. The population of the country as a whole was 846 million according to the 1991 census with about three quarters living in the rural areas. The population has risen by 2½ times since independence though the rate of increase is beginning to slow down.

School education was, to begin with, primarily a state responsibility but was later, as the result of a constitutional amendment, made a shared responsibility with the central Union government. However the main responsibility of the planning and administration of school education remains with the States. The central government attempts to develop all-India policies.

The administrative process takes place at a number of different levels, with the District being the most important. In 1991, there were 466 Districts with an average population of just under 2 million. In the same year there were 550,000 primary schools (2½ times as many as at independence), 150,000 upper primary and 80,000 high schools (about nine times as many as at independence at each level). There have been even larger increases in the number of

teachers. The numbers of pupils in the school system is equally massive, with a total school going population of well over 200 million in 1991. The majority of children do attend school for a few years. The attendance rate drops off very rapidly in the later stages of schooling.

Probably the most important indicator in assessing the Indian basic education system is literacy. The literacy rate of those who were seven years or more was 52% in 1991 (64% of males and 39% of females) compared to 44% in 1981. There is also a differential between the urban and rural areas with 30% more people in the urban areas being literate.

India has a good rail network. But its size can be gauged by the length of journeys. One of those on the NIEPA course which ended in the week the consultant was in Delhi described his journey home to Tamil Nadu in the south of the country. He left on Saturday at midday and would arrive in his home town, on the same train, early on the Monday morning having travelled continuously for about 40 hours. The train would then continue on to Kerala.

Although no one mentioned this to the consultant, the Indian government is one of the few in the world which makes a regular voluntary (if small) contribution to the budget of IIEP.

Indian education faces the challenge of the sheer size of the country and the number of learners. In addition, there are major variations between the different states, between urban and rural areas, between the chances of education for men and women and between the levels of education that individuals can attain. India has some world ranking institutions of higher education and research at the same time as it has nearly half of its primary schools in substandard buildings. But the country has a self confidence which comes from many sources, including its history.

(Main source: 'Education For All. A Graphic Presentation' Second Edition P.N.Tyagi, June 1994 (NIEPA, New Delhi))

3 Individuals Interviewed

The consultant spoke to a total of 20 individuals in four main groups:

- * Those who had been involved in one or other of the IIEP's training events or who had been to a workshop or seminar;
- * Those who were responsible for links between the IIEP and institutions in India;
- * Those who had worked on the staff of IIEP for some years or who had been involved in organising a training course or seminar with the Institute; and
- * Those who were in a position to have a view about the work of the IIEP.

As the consultant was based in Delhi and the time allotted was only 5 working days, it was impossible to meet those outside of the capital. An attempt was made from the UNICEF office to speak to those outside by telephone on the last two days. Only one telephone interview was made successfully: individuals called were either not available or (and this was the most common) lines to them were continuously engaged.

3.1 IIEP's training events

A total of 25 individuals attended 27 training events from the beginning of 1990 to end of June 1996. (Two people attended two events during the period.) The distribution is indicated below (number of women in brackets):

ATP	(2)4
Visiting Fellow or Trainee	(1)3
ITCs	(2)20

Of these individuals, 1 were based in Delhi (six of whom were at NIEPA). Of those not in Delhi, the whereabouts of six were known from completed questionnaires or from colleagues. No contact was made with another three who, from IIEP records, were based at colleges or universities in various parts of India. They were probably still there. One is now based in Paris. The location of only one was completely unknown as he had left his place of employment without telling his former colleagues where he was going.

Of the six ITCs, one was held in India (at NIEPA) with a total attendance of 21 of which 11 came from India.

3.2 Workshops and Seminars

A number of workshops and seminars, international, regional and national, were attended by Indian delegates. The consultant did not have details of these and so did not attempt to interview participants although some of those interviewed had attended some of these events. At least three national seminars were held in India as well as one regional seminars. A further seven regional or international seminars were attended by Indians.

3.3 IIEP-India links

NIEPA is one of the 15 institutions which have or negotiating a formal partnership agreement with the IIEP. The consultant had meetings with the present Director as well as several members of the staff in which the nature of the relationship was discussed.

There are four libraries to which IIEP sends all of its books and reports. They are located at the following institutions:

National Institute of Educational Planning & Administration (NIEPA), New Delhi
 A.N.Sinha Institute of Social Studies, Patna, Bihar
 Institute for Social and Economic Change, Bangalore
 Indian Institute of Education, Pune

The consultant was only able to visit the NIEPA library. His attempts to contact the other three by fax or Email did not meet with success. He did also visit the library of the National Council of Educational Research and Training (NCERT) in New Delhi.

The consultant had discussions about the newly formed Asian Network of Training and Research Institutions in Educational Planning (ANTRIEP) which in its initial phase has its focus at NIEPA.

3.4 Former members of the IIEP programme staff

Two members of the NIEPA faculty spent two or more years as members of IIEP staff in Paris. However in the interests of confidentiality, their comments have not been specifically identified but will be recorded along with those from three ATP trainees plus the Visiting Fellow who came from NIEPA and also in the general discussion of the work of IIEP. They had both been members of the NIEPA faculty before they went to Paris.

3.5 Other interested people

The consultant met a senior official at the Ministry of Human Resource Development.

4 What former trainees are doing now

An important objective of the visit to India was to ascertain where the former trainees are now. Of the 25 people who had been on a course since the beginning of 1990, 20 either were interviewed or completed a questionnaire or both. Of the other five, one had left his former employment and no one knew where he was, three had been to the ITC on University and College management and were likely to be in their previous place of employment and information was given to the consultant about the whereabouts of two others. The table below shows where the trainees were working before they went on the training course and where they are now (number of women in brackets).

Table I Place of work before and after training course with IIEP

	Work place before course						Work place at time of interview or questionnaire							
	HRD	SG	NIEP A	HE	UNI CEF	Other	HRD	CG	NIEP A	HE	HE?	UNI CEF	Other	?
ATP	(1)1	1	(1)2				(1)1	1	(1)2					
VF			(1)1	1					(1)1				2	
ITC	1		(1)5	10	(2)2	1	1		(1)3	7	3	(2)2	1	1
Total	(1)2	1	(3)8	11	(2)2	1	(1)2	1	(3)6	6	5	(2)2	2	1

HRD = Ministry of Human Resource Development; SG = State Government; HE = college or university (in higher education); HE? = likely to be at a college or university ; UNICEF = UN Children's Fund; CG = Central Government; ? = no information available

It can be seen that overall, the majority of those who took part in the 1990s in IIEP training exercises have remained in education and in many cases, in the positions that they had when they undertook the training.

Only one of the two who came from the Ministry of Human Resource Development is still in the same area of work. One, after 2½ years, moved within the Ministry to a quite different area to his previous work which had been related to the training he had received. One person on first coming back from the ATP was immediately posted out of education in the state government. He was then been transferred from state government to central government and is now working in the Health ministry. Six of the eight members of NIEPA are still working there and in the same job. One is now working in higher education policy and management at the national level. The other has left NIEPA and there is no information available of his present position. Seven of those from a college or university are still in their original positions

and a further four (all of which were at the ITC on higher education management in November 1995) are thought to be in the same positions - however none were interviewed or completed a questionnaire. (It must be recognised that those still in post are more likely to respond to the questionnaire than any who might have moved.) The two women from UNICEF have not moved. One of the visiting fellows from higher education is now also now working in higher education policy and management at the national level. Another was working as an independent consultant in India but is now employed by an intergovernmental organisation in Europe.

Overall, the majority of those who took part during the 1990s in IIEP training exercises have remained in education and, in many cases, in the position that they had when they undertook the training.

5) The Interviews

The table below shows the number of people in each category interviewed (women in brackets).

Table II Categories of people interviewed

Category	ATP	VT or VF	ITC	Former staff	Other	Librarians
Numbers	(2)3	(1)1	(2)8	1	(1)4	(1)3

Two of the people listed here fall into more than one category. However in most cases (even of those not interviewed), the direct and specific contact with IIEP had been only on one occasion. As has been stated above, those who had attended IIEP international or national seminars or workshops were not specifically interviewed as the information was not available.

5.1 Former ATP students

Three of the former ATP trainees who had been on a course since the beginning of 1990 plus one who had been on a course in the 1980s were interviewed. In addition, a Visiting Fellow who had observed and taken part in an ATP while in Paris made comments which are best noted in this section.

One particularly interesting point was that those who came from NIEPA had all been lecturers themselves before attending so that the teaching methods were of as great interest as the content. The general conclusion was that the ATP experience was good in a practical sense. The direct connection between research and training was a significant part of the training method. Some of the NIEPA staff said that this approach was being copied as far as practicable by NIEPA. Another major aspect was the international nature of the course. One trainee said that 'he was exposed to France ... and to a wide international experience through the students from many countries'. However one former trainees expressed the view that the course did not hold together. As the person put it, the course provided 'the minimum techniques useful for planning. ... What it does not do is equip a person to actually make a plan. ... How to bring the elements together to make the plan at the end. The course is too compartmentalised.'

One of the issues raised was accommodation in Paris. There is a strong feeling that the IIEP students should be accommodated together - the NIEPA hostel was cited as the ideal - but at least in the same local area or hostel. People cannot realistically choose where they should stay in Paris while they are still in India. However the warm and careful support from the IIEP staff for their well being was appreciated.

A number of former trainees suggested that the training need not be done in Paris, or at least not all of it. From the interviews with some of the senior members of NIEPA, it seems that there have been discussions about the possibility of holding the first part of the course, the common three months, in India for the English speaking contingent. The French speakers would need to be in a French speaking territory - Morocco was suggested. The basic idea would be to use NIEPA as the Indian institution. Some of IIEP staff would have to come to NIEPA for at least part of this period. A significant advantage would be the third world context. One of the study visits could be done in India. NIEPA already runs an international course - with trainees coming from Africa as well as Asia. It is also likely to be cheaper (and so release funds for more students).

For this proposal to be seriously considered, it was suggested to the consultant that a proper study of at least a year would be necessary. It would involve one professional full time in addition to a number of joint meetings of the faculty members of all three institutions involved. The issues would need to include academic (curriculum, syllabus and linking up with the final part of the course in Paris), financial as well as social (including the language) issues.

5.2 Former ITC students

A total of five ITCs were attended by the interviewees during the period from January 1990 to 30th. June 1996. They are listed below (women in brackets).

Table III Intensive Training Courses

ITC Nos	Subject of course	Date	Number attended
74	Education, employment and human resource development	8/93	1
87	Decentralizing planning and management of primary education	12/94	(2)4
102	Quality of primary education focusing on school functioning	9/95	2
104	Institutional management in higher education	11/95	(1)11
117	Planning design and management of distance learning	6/96	(1)2

The course on institutional management in higher education had been held jointly with NIEPA and had contributions from senior managers from the region in addition to a major IIEP input. All of those interviewed from universities and colleges felt that they had learnt a lot about the possible ways of making their institutions more efficient. However they also felt rather despondent about whether they could put these suggestions into practice. There was a feeling that the Indian system would not change to what was seen as a desirable Western system. They were complimentary about the methods of teaching (though one complained that it was too intensive!) but were unsure about its direct relevance to their future actions. The view expressed in the answers to the questionnaires was a little more positive.

The international nature of the course and the ability to share with colleagues were particularly important elements of these courses. A characteristic of most ITCs is the way that a great deal of the learning material comes from studies in the region or from other course members. One person commented that all the material provided by IIEP had been specially and specifically prepared for the meeting. Another said that it was good to have people who really did know what was happening in the region. He compared the course he went on favourably with courses to which expert consultants came who had no knowledge of the conditions in Asia. A major theme of IIEP courses identified by interviewees was the very down to earth and practical presentation - dealing with the nitty gritty of real situations. IIEP input was often low key, but crucial and highly appreciated.

However this assessment has to be contrasted with criticism of a very recent ITC on the grounds (also coming from a non-Indian attendee) that it did not use the rich third world experience available to it from those attending.

5.3 Seminars and Working Groups

11 seminars and workshops have been identified which involved Indian participants. Unfortunately, as has been noted above, no information was provided before visiting India regarding those who had attended them. However it is clear that they are an important part of the work of the IIEP both at a training level and as part of the research process. Some took the form of high level international seminars on important contemporary issues. Details of those attended by Indians are given in Table IV.

Table IV Seminars and workshops

S Nos	Subject of Seminar or Workshop	Where	Date	Indians present
-	Improvement of basic education services - nat. res. seminar	India	11/90	10
112	Student loans for higher education - regional seminar	Malaysia	12/90	1
113	Strengthening national training capacities - int. seminar	France	12/90	2
-	Improvement of basic education services - nat. res. seminar	India	7/91	34
129	Improving managerial efficiency in higher education - int. seminar	France	11/92	2
131	Quality improvement of primary schools - int. seminar	France	1/93	2
138	Decentralization and participation in education - reg. seminar	Philippines	8/93	2
137	Impact of HIV/AIDS on education - international seminar	France	12/93	1
-	District level plan implementation - national seminar	India	8/94	5
139	Training needs in educational planning and management - regional seminar	Turkmeni- stan	9/94	1
147	Asian network of training and research institutes	India	12/95	7

S Nos = Seminar number; nat. res. seminar = national research seminar; int. seminar = international seminar; reg = regional;

The first two national research seminars were held to discuss the Indian case study as part of the inter-regional project on the improvement of basic education services. The workshop was attended by the NIEPA central team, the five researchers and officials from the educational administration in Madhya Pradesh along with representatives from IIEP. The third one was

concerned with the planning of education in India and was organised jointly by IIEP and NIEPA. NIEPA also hosted a meeting of senior representatives of Asian training and research institutes at its premises which constituted the first meeting of the Asian network. There have been four high level international seminars held in Paris at IIEP which have involved Indians

The few comments that were made about these seminars were positive, but no detailed discussion were held on them. There does not seem to be a very clear distinction to be made between some of the ITCs and some of these seminars.

5.4 Research projects

Research is seen by IIEP as a fundamental input to its training. NIEPA also sees it as very important to its own training. The International Institute has promoted this in India by conducting research, usually in the form of case studies, using local teams. These research projects go through the process described in Chapter 3 of the main report. Often the research will start with a regional meeting in which participants each come prepared with a review of features of their own education system. In this way, issues of comparative interest can be identified by those attending the meeting who can begin to map out research proposals. A number of the seminars and ITCs listed above served this purpose.

In the case of India, since the beginning of 1990, a number of projects have been undertaken. Thus as part of an inter-regional project on the improvement of basic education services, a study was implemented in Madhya Pradesh. This project was started in 1989 along with studies in China, Guinea and Mexico. The Indian results were discussed at the two national seminars mentioned above in 1990 and 1991 and then with others at an international research seminar in 1993 before final publication.

Indian representatives attended a seminar in the Philippines in 1993 which examine, from the perspective of trainers, policy makers and researchers, the current nature of the decentralisation and community participation in education in 12 countries in the region (including India).

An important study, which followed from the two above, addressed the mechanisms for decentralising the management of schools in South Asia. Case studies were conducted in five countries (including India) and a preliminary discussion was held at a regional workshop in Nepal in December 1994. (It was at this meeting, it seems, that the concept of an Asian network of institutions was developed.) After further work, these case studies, have now been revised and written up as a comparative analysis of the status of decentralisation in the five countries. They were discussed at a meeting at which the Asian Network (ANTRIEP) was set up in December 1995 (see section 5.5.2 below).

In the latest phase of this series of studies, a six-nation project in improving teacher supervision and support services for basic education is taking place. A study is being conducted in Uttar Pradesh in which the members of the research team are all members of the State Institute of Educational Management and Training in Allahabad. It is being overseen locally by a senior member of NIEPA.

One other piece of research was a study made in 1991 as part of an inter-regional project

looking at the management of institutions of higher education. This was conducted at the Birla Institute of Technology.

The major research link that IIEP has in India appears to be with NIEPA. It is through NIEPA that other contacts are made. Those who have been involved with research projects feel very comfortable with the relationship they have with IIEP staff. Although it is usual for the initiative to come from IIEP, there is no feeling that the Institute comes with a completely worked out proposal which is not open to any sort of negotiation or discussion. One researcher described how he was given a one-page project description - and was able to develop it from there. In a project with teams from a range of countries, the question is how to give the flexibility that allows different issues to be dealt with appropriately while at the same time keeping the project together. This is done by the responsible IIEP researcher monitoring progress and also by ensuring contact between the teams. The consultant was told that money is not the main incentive as involvement in these research projects is seen as part of the individual's normal duties. It is a way in which those involved, both individually and on behalf of the institution, are able to develop academically and professionally.

The Director of NIEPA also expressed the view that the National Institute had the capacity to do research not just in India but also in the region (especially in the sub-region) in association with IIEP. There was considerable interest expressed by NIEPA staff on a personal level to be able to do research with the IIEP. As one who has not had the opportunity so far, put it to the consultant: "We also want."

In all of the discussions at all levels, there was an implicit (and sometimes, explicit) recognition that the leadership role remained with IIEP. This was seen as being deserved and there was no resentment about it.

5.5 Formal links to the region

5.5.1 The National Institute for Educational Planning and Administration (NIEPA) as a partner institution

NIEPA is one of the institutions which has signed a formal partnership agreement with IIEP. It is evident from what has been written above that this link is effective. The importance of the link to NIEPA is shown by the photograph on the outside back cover of the latest NIEPA Annual Report of the platform of a seminar with a large banner behind stating "District Primary Education Programme - NIEPA-IIEP". The Directors of both Institutes are shown.

For a full understanding of the relevance of the link, a short description of the National Institute is necessary. It was founded in 1962 (one year before the IIEP, as was pointed out to the consultant) as the *UNESCO Regional Centre for Training of Educational Planners, Administrators and Supervisors in Asia and the Pacific*. After going through various transformations, it was taken over by the Indian government in 1970 and renamed the *National Institute for Educational Planning and Administration* in 1979. It is an autonomous institute under the Ministry of Human Resource Development. It has as its major purpose the training of trainers at regional, state, local and institutional levels.

In the year 1994/95, NIEPA conducted 39 programmes with 1,151 participants from India.

They came from every state and from all but two of the union territories. 37 of the programmes lasted one or two weeks. It has one Diploma programme per year for Indians comprising three months in Delhi and a further period of study in the student's home area. This is attended by an average of 20 people. In addition, NIEPA has run an international Diploma course since 1985. In the two most recent courses, there was a total of 28 students from Asia (Bangladesh, Indonesia, the Maldives, Sri Lanka and Vietnam) and from Africa (Ethiopia, Ghana, Mauritius, the Sudan, Tanzania, Zambia and Zanzibar).

It has a large research programme, some of it requested by the government or state education bodies, and it also has a significant publishing programme to disseminate the results of research. It has a list of 43 publications, some of which are not priced. It publishes two journals, one quarterly in English and one in Hindi.

Together with the neighbouring National Council for Educational Research and Training (NCERT), it seeks to provide a service to the many State Institutes of Educational Management and Training and the even greater number of District Institutes for Educational Training.

It can be seen that NIEPA has a central role in the provision of training for educational planners and administrators. In addition, its research is used to support national (and state) policy making as well as strengthening its own training. The link with the IIEP is therefore very appropriate.

The Director of the National Institute saw this link developing in a number of ways. There have been a number of jointly organised seminars and training courses, both at a national and a regional level. This is a very valuable form of cooperation which he and others felt was good because of the feeling of ownership given by the IIEP to its local partner.

Joint research is the second area of important contact - and the National Institute would like to see this extended so that NIEPA is involved in the region as well as in India.

The third area of cooperation has been the training of members of NIEPA staff, both at the ATP and at the ITC level. Parallel to this has been the NIEPA staff who have spent some years on the IIEP staff in Paris. It was suggested that this could be developed by NIEPA staff going to Paris as (effectively) short term research fellows, but on a regular basis. As mentioned in section 5.1 above the suggestion has also been made that part of the ATP could be conducted in New Delhi.

The formation of the Asian network (see section 5.5.2 below) adds a further important dimension to the IIEP-NIEPA link.

This link between the two institutions is of clear benefit to both of them. IIEP benefits from NIEPA's location in India and in the sub-region, and its intimate knowledge of and involvement in the local education system. NIEPA benefits from IIEP's international status as part of UNESCO with a depth of professional resources and expertise and extensive international linkages. IIEP's competence and sensitivity have helped to cement the relationship. International institutions lend a credibility to their partners in developing

countries and the IIEP has used that to help build up local institutions.

5.5.2 The Asian Network of Training and Research Institutions in Educational Planning (ANTRIEP)

This network is seen as being of great importance by IIEP and in India. This was true not only of NIEPA but also in UNICEF and in the Ministry of Human Resource Development where senior educationalists expressed their view of the significance of the network to the region. It has 12 members from eight countries in addition to IIEP and it is open to new members. It appears to have had its genesis at an ITC in Kathmandu, Nepal in December 1994. Although it seems that the IIEP hoped that some sort of network would develop, the perception of those in India involved in the Kathmandu meeting was that the idea of a network came up spontaneously. No one felt it had been foisted on them. The network was formalised at its first meeting a year later and has the following aims:

- * The exchange of information between different institutions in Asia;
- * The production of a newsletter (the first one has just been issued); and
- * Exchange of personnel on a short term basis;

NIEPA is for the next two years, the focal point for the Asian region. However IIEP is playing a crucial facilitative role made possible by its political neutrality. Given tensions in the region at political level, e.g India's relations with Pakistan, an external professional 'broker' can play a useful facilitative role in convening regional and sub-regional meetings of professionals. The next meeting of the Network will be at the Korean Educational Development Institute (KEDI) in Seoul in 1997 and will be held in conjunction with a research seminar on the first stage of the inter-regional study on improving teacher supervision and support services for basic education.

One issue mentioned both in India and in Paris is that of funding. Only a comparatively small sum of money is required to set up the small secretariat needed by ANTRIEP and to assist in the funding for the meetings which will make the network effective. The Network does not have a membership fee and it would be difficult to charge one because some of the institutions are not free, under the terms of their constitutional status or funding mechanisms from governments, to pay a fee. Unfortunately it is also difficult to get funding from donors to support the central budget for a regional organisation such as this. Most donor funding is for bilateral programmes of support to national governments, usually for specific projects. One of the reasons for holding the next meeting of ANTRIEP in conjunction with the research seminar is to provide funding for at least some of those attending.

5.6 Dissemination

5.6.1 Depository Libraries

There are four depository libraries in India, but NIEPA's is the only one in Delhi. It was evident that the system was working well there. The librarian commented to the consultant that as soon as books were made known to the professional staff through, for example, the

IIEP Newsletter, her life 'was made hell' until she got the relevant copy. She always takes the opportunity of talking to people from other, mainly state or district, institutions to recommend that they contact producers of literature like IIEP for complimentary copies of their material. She also felt that it was right that librarians should be expected to make some effort by writing to obtain the books. This indicates commitment and the intention to use the material properly. The consultant was not able to contact the other three depository libraries.

He also visited the NCERT library, which is also a good professional library and is next door to NIEPA. It used to purchase all UNESCO publications until a few years ago. The problem with selective purchase is the enormous bureaucratic hassle in getting foreign exchange - usually three or four visits to the bank. The consultant's copy of IIEP catalogue was left with the librarian who may well take the opportunity to obtain material of particular relevance to the work of the Council.

5.6.2 IIEP books for personal use

Some people were aware of the availability of the free publications from IIEP. Those at NIEPA did not feel it necessary to obtain personal copies of IIEP publications because they were available in the library. One former visiting fellow said that when she had retired (the first time), she had donated most of her personal copies of IIEP publications to the library.

5.6.3 IIEP Newsletter

The IIEP Newsletter is received with unanimous interest and acclaim. One recipient (who had been on an ITC) makes 10 photocopies each time for circulation to colleagues. Even if the material is not directly relevant, people feel that they are kept in touch. Both NIEPA and ANTRIEP are following IIEP's example and issuing their own newsletters.

5.7 Others

The views of people met by the consultant other than trainees and NIEPA and NCERT staff, have mostly been incorporated into the above account. Some comments of a senior official in the Ministry of Human Resource Development are reported separately below.

The official said that he supported the work of the IIEP and said that he felt that India in particular has gained a great deal from it. He particularly supported the building up of the Asian network (ANTRIEP). However he also feels that it is necessary for the Institute to build stronger direct connections with the region. As a UNESCO body, maybe it should use the UNESCO Principal Regional Office for Asia and the Pacific (PROAP) in Bangkok to form a closer and more dynamic relationship with the countries of the region.

He suggested that there was a need for members of the education service at central and state level to be able to take part in IIEP training programme. Although he saw the need for academics from NIEPA to take part in the training, the practitioners also needed training. The Ministry intends to send more people to the ATP in the future. He developed this further by suggesting that IIEP should recognise the importance of practitioners as a resource and not only academics. It was suggested that a number of outstanding administrators, some former IIEP trainees, should and could be more effectively used by the Institute in its various training and research programmes.

6 Conclusion

There is a very real and effective involvement with educational planning and management in India. The strongest link is with NIEPA - but there are links with the Ministry of HRD which are developing further. There seem to be few contacts between IIEP and state education departments or training institutions though they have had trainees attending the ATP and some ITCs in the past. It may be argued that this is the job of the federal agencies with which IIEP is already linked. Some Indians would like to get a greater part of IIEP's training cake. The Institute has to serve the needs of all the member states whatever their size. As the second most populous country in the world, with many of its constituent states having populations as large if not very much larger than many full member states, India will never get more than a small part of IIEP's resources. However good and effective its research and training is, how will the Institute begin to make an impression on the huge needs of a sub-continent? The view of this consultant is that its close working with a central institution such as NIEPA which is committed to the training of trainers is the correct way forward. The demand by the central Ministry for more training is valid if those who get the training are able to stay in education for a reasonable time. This is of course more important for those going on the ATP than on the ITCs.

The support for the Asian Network is also valuable and was very strongly welcomed. Part of this success is the low key part which IIEP is playing. However possibly IIEP needs to have a forum through which it can make a more effective contribution to the development and strengthening of educational planning in the region - and maybe the suggestion of using the UNESCO PROAP in Bangkok should be seriously considered. It will then have a stronger platform from which to make its policies clear. It will also be the forum in which the governments of member states in the region will be able to give more effective feed back.

Kees Maxey
24 October 1996

Appendix 4**TANZANIA CASE-STUDY****1 Introduction**

This case study was undertaken in the period July 17 to August 2, with some additional work from September 7 to 21, by Peter Williams, consultant and team leader of the evaluation study of Sida assistance to IIEP. He was simultaneously visiting Tanzania for a separate Sida assignment assisting the Ministry of Education and Culture in Tanzania to prepare a National Conference on the Education and Training Policy; and on the second visit to attend the Conference in Arusha, September 10 to 13, and to assist with follow-up. He 'interleaved' work on the two assignments and in fact many of the main informants on IIEP were also involved in the Conference. Peter Williams also had some knowledge of education in Zanzibar through having undertaken a consultancy for the Zanzibar Ministry of Education, funded by Danida, in November 1995 on restructuring the Ministry.

2 Tanzania as a case for study

Tanzania was chosen as a case study for some of the reasons adduced in the main report. It has had extensive co-operative relations with IIEP over the past three decades, and has also been a major recipient of education assistance from Sweden. Sida has supported a number of IIEP programmes for Tanzania and has provided fellowship support for some participants on the Annual Training Programme in Paris.

As a very poor country, with a rapidly growing population, Tanzania constitutes a useful case for this evaluation. Its population of 28 million people brings it into the medium range of countries for population size. It is also particularly interesting as a country with two quite distinct education systems. Tanzania is a United Republic, containing a large mainland partner, and a much smaller island partner of Zanzibar (basically the two islands of Unguja and Pemba) with only three quarters of a million people. It was very clear in the course of this study that by choosing Tanzania, the evaluation study had effectively increased the number of cases from three to four, and had achieved a wide spectrum of country sizes from India's mega-system(s) to mainland Tanzania (around 27m.), Zimbabwe with its 10m. people, and Zanzibar as a 'small-state' system.

Tanzania adopted a strict quantitative planning approach from the early days of Independence. As a poor country with severe inherited skill shortages, it seemed an obvious case for the manpower planning approach. A number of the earliest IIEP case studies were on Tanzanian problems and in its first 25 years of existence IIEP is believed to have trained more Tanzanian nationals on the ATP than those of any other country except Nigeria. Even now, in 1996, Tanzania's cumulative total of 31 ATP trainees places it as the third largest beneficiary of the programme after Nigeria (45) and Brazil (32).

More recently IIEP's relations with Tanzania have been somewhat less close. The three participants sent by Tanzania in the six years 1990-96 to the ATP, including only one from the large mainland system, represents a marked reduction in the level of intensity of participation in the ATP compared with earlier periods.

There are a number of possible reasons. First, competition for admission to the ATP has been fierce and more countries are now seeking places; and it seems that in this competitive environment Tanzania has submitted fewer candidates for the ATP sufficiently outstanding, in relation to applicants from elsewhere, to be admitted to IIEP programmes. It also seems likely that Tanzania has nominated comparatively few women candidates; a factor which, other things being equal, might have helped to boost its overall success rate in applications. Tanzanian informants hinted that lack of local resources to fund the training was a major problem, but it is unclear to the consultant that there have in fact been candidates of high quality who were rejected for that reason.

Second, the succession of ministers, principal secretaries and commissioners with IIEP training seems, on the Mainland at least, temporarily to have come to an end, and IIEP is therefore less well known in the upper echelons of the Ministry of Education and Culture in Dar es Salaam than in some past periods.

A third possible reason that came to light in the course of this study was the shift in 1990 of the location of the National Commission for UNESCO, which handles Tanzanian correspondence (including course applications) for UNESCO/IIEP. In 1990 the former Ministry of National Education was split in two with one ministry handling higher education, science and technology and a second being responsible for basic education and culture. Because of the science activities of UNESCO, the National Commission was lodged with the higher education ministry, despite the fact that UNESCO's own educational priorities are more on the basic level. As a result, and also no doubt because the international office in the Ministry of Education and Culture has also been discontinued, the relations between IIEP and the ministry responsible for basic education have been less close than hitherto.

3 Conduct and coverage of the Case Study

The Consultant worked largely on the basis of a baseline roster of activities prepared by IIEP. This covered 23 Tanzanians involved in IIEP training activities in the period 1990 to 1995, either as trainees on the Annual Training Programme in Paris (three individuals), or as participants in Intensive Training Courses (19 additional individuals) and a research fellowship at IIEP (one individual). For this group contact addresses were given and questionnaires distributed by IIEP, separately for the ATP alumni and for the others. Details were also given of seven depository libraries in Tanzania receiving IIEP publications.

The consultant was also given copies of reports and documentation relating to the two IIEP-sponsored meetings in Tanzania in this period. These were the Research Review Workshop on the Tanzania Literacy Programme at Morogoro in October 1990 and the Sub-regional ITC on the Design of Basic Education Programmes and Projects at Arusha in November 1992. In the former case no current contact addresses were provided and so neither questionnaire distribution, nor interviews with the majority of Tanzanian participants, was possible.

The coverage of this review, based on the brief, is incomplete in two other respects. Seven Tanzanians attended ITCs between February 1995 and 1996. Furthermore there were about eleven Tanzanian attendances at research workshops, seminars and policy forums over the period 1990 to 1996, in addition to the Morogoro research workshop already mentioned. Information about these was received too late for contact to be made with the individuals

concerned, and the Morogoro workshop is the only one in this series which receives attention in this report.

In the course of the evaluation it transpired that Sida and IIEP were jointly funding, within the framework of the International Working Group on Education, a study of education policy formulation and implementation in Tanzania. The consultant was able to meet Dr Lene Buchert at her office in Lyngby, Denmark, in late August, before her project was completed. It will no doubt be advantageous for readers of this country case study to read Dr Buchert's report in conjunction with it.

In Tanzania, interviews were held with as many ATP and ITC trainees as could be contacted. This also enabled the consultant to discuss the Morogoro research review workshop and Tanzanian participation in SACMEQ, since the professionals involved were ITC/ATP participants. Apart from these interviews and visits to depository libraries, conversations were held with the Education Minister and Principal Secretary in Zanzibar (themselves both IIEP alumni), and with senior administrators and planners in the two education ministries in Dar es Salaam, and with the National Commission for UNESCO and the UNESCO Sub-Regional Representative in Dar es Salaam.

The next sections of this report consider IIEP-Tanzania co-operation in training, research and depository libraries/institution-building successively.

4 Training Co-operation

4.1 Tracing alumni of IIEP

The appendix records the extent of the trace of trainees carried out. Only one of the 23 trainees identified by IIEP could not be contacted directly or indirectly by the consultant during his visit.

Three Tanzanians attended the **ATP** courses between 1989/90 and 1994/95.

Two were from Zanzibar (including one woman) and one was a male from the mainland. The female from Zanzibar and male from the mainland were interviewed but the male from Zanzibar could not be reached in person or by questionnaire. It is understood he has recently been posted to Pemba, which the consultant did not have time to visit on this occasion.

Of the 19 Tanzanians who during this period attended **ITCs** only (the three ATP trainees also attended ITCs in this period), 17 completed questionnaires. Of those 17 all except four were interviewed personally. One case of non-interview was because the person concerned was abroad in Manchester.

The **Research Fellow** was interviewed and completed a questionnaire form.

4.2 The Annual Training Programme (ATP)

The population of three trainees is too small to draw conclusions or to avoid breaching confidentiality if any detailed account of their experiences and reactions were to be attempted. As explained, only three Tanzanians (two from Zanzibar) have attended the ATP in the period

in question, and one of these could not be contacted. One of the trainees has recently become Director of Planning in Zanzibar having been in the Inspectorate until now. In the body of the evaluation report the views of the two Tanzanian ATP trainees contacted are taken into account in the reporting of the complete tracer study of participants in the ATP.

Inevitably the consultant met a greater number of people who had attended the ATP in an earlier period. They were being interviewed in the course of the evaluation either as senior policy makers with potentially useful observations to make on IIEP and its contributions to Tanzania's two education systems, or as participants in subsequent intensive training courses falling within the period of the evaluation. (An interesting point in relation to the latter group is that six out of 19 Tanzanians who had 'only' been on an ITC in the period in question had also attended the ATP previously, and one or two of them made the point that they were able to help their compatriots 'new' to education planning concepts to get more benefit out of the ITCs.) Generally the former trainees' retrospective view of their time in Paris was strongly positive, and they had enjoyed the chance to learn of the experiences of other countries, to get to know a good deal more about their own system and to acquire useful knowledge and techniques. They were strongly appreciative of the support they had received from IIEP's staff.

There was some disappointment that Tanzania had not received more training opportunities on the ATP. It was said that candidates had been put forward but either they were not funded or could not be taken by IIEP for other reasons. We had heard at IIEP that Tanzanian candidates had not always satisfied the Institute's quality requirements in recent times - possibly the declining attraction of the public service in Tanzania has resulted in fewer of the high fliers joining teaching, and afterwards the education administration (for teaching is rightly or wrongly the main source of recruits for education policy makers and planners in the Tanzania Public Service).

4.3 Intensive Training Courses (ITCs)

The consultant was provided details by IIEP of seven ITCs attended by Tanzanians from mid 1990 to February 1995. By some quirk of fortune there appear to have been no ITCs in East, Central or Southern Africa between mid 1990 and September 1992 and so all the seven ITCs were in fact crowded into a 30-month period. There are known to have been seven Tanzanian individual 'attendances' at three further ITCs since February 1995, but as explained above the consultant was not provided with names or contact addresses before his visit to Tanzania and no trace was undertaken.

The seven ITCs fall into three groups: (1) the sub-regional training course hosted by Tanzania in 1992 at Arusha on the Design of Basic Education Programmes and Projects (ITC 69), which was attended by 15 Tanzanians; (2) four courses (ITCs 70, 76, 92 and 99) preliminary to and involving SACMEQ, with nine separate 'attendances' by five individuals of whom one attended four times and one twice; (3) two courses in Mauritius attended by one and two Tanzanians respectively. Details are as follows (figures refer to total Tanzanian participants with females in brackets):

Basic Education

ITC 69 Nov 92	Arusha Tanzania	Design of basic education programmes and projects	15(2)
<u>'SACMEQ series'</u>			
ITC 70 Sep 92	Harare Zimbabwe	Data building and data management	4(3)
ITC 76 Sep 93	Harare Zimbabwe	Data processing and policy report preparation	1(1)
ITC 92 July 94	IIEP and Sep 94 Harare Zimbabwe	Preparation of a project plan for SACMEQ	2(1)
ITC 99 Feb 95	Harare Zimbabwe	Meeting of national research co-ordinators for SACMEQ	2(1)
<u>Higher Education</u>			
ITC 66 Sep 92	Mauritius	Education, employment and human resource development	1(-)
ITC 75 Sep 93	Mauritius	Institutional management in higher education.	2(-)

The 27 attendances shown above involved 22 individuals of whom three attended both the ATP and ITCs during the period, and the other 19 attended ITCs only. Of the three 'ATP trainees' one attended ITCs 92 and 99. One of the 19 'ITC only' trainees attended five ITCs in all, nos. 69, 70, 76, 92 and 99.

These ITCs were rated highly by the participants. The one at Arusha received particularly 'high marks' from Tanzanians for the quality of the IIEP resource people, for the value of the practical work and the quality of the materials used, some of which had proved helpful in subsequent work. The input of participants from other countries was found useful. It was confirmed that Tanzania had been able to participate fully in setting the agendas for the course and that it had a feeling of 'ownership' of the proceedings. In general the ITCs had been stimulating to participants.

The programmes had been well executed, with the possible exception of some disorganisation at the first in the SACMEQ series at the University of Zimbabwe in 1992. The main criticism of ITCs made to the consultant was lack of follow-up after an interval to refresh the knowledge and skills acquired.

4.4 Subsequent careers of trainees

An issue of concern with all training programmes is their usefulness in relation to the actual responsibilities the trainees have. While relevance should not be defined too narrowly, and there is the likelihood that the increased capability of trainees will make its impact even when they move jobs, it is worthwhile to review the jobs presently being done by those who have earlier attended IIEP programmes.

The analysis in the appendix to this case-study report indicates that just over half (12) of those involved in this case study follow-up are now doing a different job from that recorded by IIEP, which was in most cases their assignment at the time of participation in an IIEP programme. Seven of those 12 were however with the same employer (the Ministry of Education, or a Ministry-related institution, in every case). Of the five who had changed employer, only one had shifted right out of the education sector, from university administration to administration

of public housing. The four others who on retirement had made a job shift, had moved to new 'parastatals' in education, or in one case to establish and run a private school. The move to new assignments is not necessarily a criticism of the selection for the IIEP Intensive Training Courses, because the one attended by the majority was an in-country course taking place three and a half years ago, and it was inevitable that it should be attended by fairly senior officers, who in a number of cases have reached retirement age since 1992.

Dramatic job-shift would have been more serious in the case of the ATP, because of the greater investment of time and money involved in attendance. None of the three trained over the period has moved out of the education sector. It was pointed out to the consultant that one of the advantages of the small-state system in Zanzibar, was that professionals were not lost sight of. Some former ATP trainees had moved jobs from education to other branches of the public service, but had been used on task forces or commissions involved in government policy-making for education. To some extent this was also the case on the Mainland. At the Arusha Conference it was publicly remarked that a high proportion of the key participants, coming from the Prime Minister's office and elsewhere, had worked previously in the Planning Unit of the Ministry of Education, and the Consultant ascertained that some of those had been on the ATP at IIEP.

5 Research and Studies

Tanzania has over the years been the focus of many IIEP studies - twenty are listed in the current IIEP catalogue, ranking Tanzania second after India in numbers of studies devoted to its experience - but the flow of such studies has abated somewhat lately. Very recently Sida and IIEP have jointly funded an IWGE study in 1996 of education policy formulation and implementation in Tanzania, but the report was completed outside the period to which this evaluation relates and has not been seen by the consultants. Tanzania has hosted a research workshop in 1990 and has been involved, through the two ministries in Dar es Salaam and Zanzibar, in the SACMEQ project. The Head of the Education Research Unit was a Research Fellow at IIEP for a brief period in 1992.

The **research review workshop on Tanzania's literacy programme** held in Morogoro in Tanzania in 1990 has not been covered in detail by this evaluation. Current contact addresses for the 22 Tanzanians who attended the Seminar were not available and so no trace was attempted. However, two key Tanzanian participants were contacted largely as a result of their participation in ITCs in 1992 and later. The Tanzanian administrative co-ordinator of the Workshop reported that co-operation with IIEP in mounting the seminar went very smoothly. The chief adult education professional at the time of the Seminar was also interviewed. What follows below, is based on these two interviews, the workshop report, and correspondence with the IIEP-contracted British consultant to the research project.

The research workshop received a draft research report on the Tanzanian literacy programme. This emerged from an IIEP/Tanzania research project undertaken with Sida funding and which had been conducted over the previous two or three years. There had been some parallel work in Kenya. The research was conducted before the period to which this evaluation relates and involved Tanzanian researchers in its design, execution and analysis/write up. Some rather dramatic findings emerged from the research which suggested that the Tanzania Literacy Programme had in fact been much less effective in its coverage and effects than had been

widely assumed. It is understood that Sida had these findings independently checked through follow-up research conducted by a team under the Centre for the Study of Education in Developing Countries (CESO) from the Netherlands. The former chief of adult education told the consultant that his team in the Ministry did not accept that the areas chosen for the research were representative and that the conclusions were not, therefore, wholly valid. However that may be, the eventual outcome appears to have been a much lower priority accorded to adult education both by the mainland Tanzanian Government and by Sida.

Unfortunately the lack of funds for dissemination of the report and its findings (rather remarkably the former chief of adult education was quite categorical that the copy of the seminar report given to him by the consultant was the first he had seen or received, even though he served in his post with the Ministry for a further two and a half years before retirement!), and the reluctance of the sponsors to give much publicity to them until they had a 'second opinion', caused some loss of momentum and a failure to follow up the Morogoro seminar as effectively as might have been wished. From what has been reported to the consultant this research project does nevertheless appear to have had a considerable influence on policy. It also brought capacity-building benefits in the sense that the Tanzanian consultants are understood to have gained considerable professional development through their involvement in the project and subsequently to have made good progress in career terms.

The main IIEP research and training programme with which Tanzania is presently involved is the **Southern African Consortium for Monitoring Educational Quality (SACMEQ)**. Activities originally focused on Zimbabwe's experience and SACMEQ is also discussed in the Zimbabwe case study. Both the Zanzibar system and the mainland Tanzania systems are involved in SACMEQ, though the commitment of Zanzibar has been more sustained and, it would appear, much more productive. Since the consultant's visit it is understood that a draft report on Zanzibar has been completed, but the mainland system did not get beyond the pilot stage.

SACMEQ is a pioneering, and in many respects unique, project and elicits a strong sense of commitment and ownership among participating countries. On the basis of his interviews in Tanzania the consultant is in no doubt that the National Research Co-ordinators feel that they are in the driving seat and that IIEP's role is basically that of technical adviser and friend.

It is still too early to know whether the sustained work that has been undertaken in Zanzibar can be translated into changed policies and reformed procedures. Much will depend on the success of the next stage of the work which will involve disseminating and discussing the findings among senior policy makers. The consultant gained the firm impression that they do not in every case at present fully understand the implications of the project. It is obviously important to ensure that the active and enthusiastic engagement of individuals in the exercise actually translates into Government policies and system-wide practices, and involves more than the professional development of individual participants. It is understood that there will be a policy seminar in the near future which should sensitise principal secretaries to what has been achieved, and which may therefore serve to ensure a wider ownership at national level of the fruits of the project. It would be useful if such a seminar could also dispel the lack of understanding, evident among some of those interviewed in Dar es Salaam and Zanzibar, as to how, if at all, the IIEP-supported SACMEQ activities on the monitoring of educational quality

relate to the parallel work being undertaken under separate UNESCO-UNICEF auspices. Their programme on Monitoring the Education for All Goals: Focusing on Learning Achievement also concerns itself with indicators of quality in primary school in some of the SACMEQ countries, amongst others, including Tanzania.

6 Depository Libraries

Contact was made with six of the seven IIEP depository libraries in Tanzania. The seventh, at the Management Institute for Training of Education Personnel (MANTEP) Bagamoyo could not be visited, but the Director of MANTEP was interviewed about it.

The visits by the consultant to six of the locations where the library collection should have been held, and an authoritative account of the position at the seventh, indicate that in Tanzania this scheme is not working as intended. One major reason is the lack, or absence on training, of the librarians and the consequent non-functioning of the libraries, but there are also instances where the consignments of material despatched by IIEP cannot be traced.

One functioning library was seen at the Ministry of Education in Zanzibar, with a trained librarian: but here the well catalogued and presented collection was in a library that had almost no users and it is understood that the library will probably be closed and its collections moved to the public library system. It is understood that the Library of MANTEP also has a trained librarian in post; this library in Bagamoyo was not visited, but the Principal personally confirmed to the consultant that none of the materials had been received, and suggested a Dar es Salaam box number should be used in future.

At the University of Dar es Salaam the Faculty Library was operating, but there was no evidence on a tour of inspection, made in company of the Dean, that there were any IIEP books in the collection: and it was later confirmed by one of his senior colleagues in charge of the education planning courses that the materials had not been received by the Faculty of Education. Nor were any IIEP materials in evidence in the MoEC library (no librarian). The library of the Ministry of Science, Technology and Higher Education was not functioning as the librarian was abroad on a training course, and it is unclear whether the materials had been received. The IIEP materials were located but found to be not unpacked/ready for use, because of lack of library staff, at the Curriculum Development Unit Zanzibar, where the librarian was away on training, and at the National Commission for UNESCO, Dar es Salaam.

In Zanzibar the education planners in the Ministry did not seem to be aware that the IIEP materials were available (uncatalogued at the nearest location, but well presented somewhat further away at another) within a few hundred metres from their own office, and in Dar es Salaam the planning unit staff were also apparently unaware that the Ministry Library was supposed to be an IIEP depository library.

The implications of the above are threefold. First there is need for a feedback system to ensure that IIEP quickly becomes aware whether (and if not, why not) materials are getting through to their intended recipients. In the Tanzania case checks are needed on why, in some instances, materials despatched have not apparently arrived at their destination. Second, there is need for positive steps to ensure that there is some supporting library infrastructure including trained staff and suitable arrangements for cataloguing, displaying and making

accessible the materials. It is understood that there has been co-operation with the German Foundation for International Development (DSE) in recent years to try to secure the possibility that librarians from some of the depository libraries are included in DSE librarian training programmes. This seems a useful approach though the drift of trained staff into other more lucrative posts will always pose problems. Third, it is important that potential users of the material are also informed about what is available and where to consult it. IIEP could consider developing some kind of 'user-awareness stimulation' materials to accompany the deposit collections, which their custodian could be encouraged to circulate to potentially interested persons in their own country. At present in Tanzania the laudable intentions of this potentially useful scheme are being thwarted. Until these problems are overcome, it clearly does not represent a cost-effective use of resources.

7 Institution-building

The depository library scheme of IIEP is part of its wider programme of institution-building in educational planning. The institution-building programme is focused on universities, colleges and training institutes as well as ministries of education, whose libraries benefit from the depository library programme. Neither of the principal training establishments involved in preparing education planners and managers in Tanzania, the University of Dar es Salaam Faculty of Education or MANTEP, is included among the 15 institutions worldwide which have concluded partnership agreements with IIEP, though both are on the depository library list.

The Head of each of the two institutions was anxious that the depository library programme should work effectively, but they saw that as one of several professional support services that IIEP could perform for their institutions. They would appreciate help with staff development, and the University in particular complained that government monopolised IIEP's training opportunities. They thought that IIEP could help to build networks in the East and Southern African sub-region through which information on training materials, case studies and training methodologies could be exchanged. They would like to see IIEP-sponsored training events take place at their own institutions rather than, say, in Arusha in order that institutional development benefits might flow to the institutions engaged in training.

8 Impact of IIEP Support to Tanzania

At the individual level of those who had been on ATP and ITCs, there was generally positive feedback about the training experience. They reported that they had benefitted professionally from their training and had been able to apply some of the skills learned. To that extent, and also considering that the great majority of participants stayed in education (many in the same job) the training could be rated as relevant. The participants considered most of the courses well run, and to that extent effective.

Admittedly such evidence should be taken with 'a pinch of salt', recognising that participants almost always tend to enjoy time out in convivial surroundings for which they are paid allowances. It is also true that the questionnaire responses generally lacked 'depth'. They were disappointingly lacking in perceptiveness, yielding very few informative insights or constructive suggestions. Over half the replies were in respect of a single course, that at Arusha in 1992 on the design of basic education programmes and projects. But even allowing for such reservations about the weight to be placed on the questionnaire results, the expression

of positive satisfaction must be rated as strong.

Turning to the status of education planning as a profession, it would appear that Tanzania's close relations with IIEP in the past have given educational planning an even greater prestige in Tanzania than it tends to enjoy in many places elsewhere. There is a respect for planning, and a professional pride in those who have been trained at IIEP, at the University of London Institute of Education and elsewhere, that is impressive. Evidence of this may be seen in the formation of an Association of Tanzania Education Planners with the aim of making available the members' expertise to potential contracting agencies, holding professional meetings, and possibly publishing a journal. Such expressions of intent may well outstrip present reality and future possibilities; but this is the kind of initiative that might be worthwhile for IIEP to consider encouraging and nurturing as part of its institution-building efforts.

Moving on to consider the system as a whole, one can first ask whether IIEP's input has had, or continues to have, much effect on the overall quality of education planning in Tanzania. In attempting to answer this question, two prior 'disclaimer' points need to be made. The first is that although much of the senior cadre has been exposed to IIEP training in the past, there has also been much parallel exposure to other external resources and influences - e.g. training at the University of London Institute of Education, at other British universities, at Harvard etc and there have been shorter workshops and seminars arranged by other assistance agencies. So successes and failures must be laid at many doors, not only at that of IIEP.

Second, the exposure of Tanzania, particularly the mainland system, to IIEP influences in the six-year period covered by this evaluation has not been exactly intensive. For example, only one participant from the mainland has attended the ATP in this period and he is not in a particularly central position planning position. Other IIEP interactions with Tanzania have seemed somewhat fragmented and to be focused more on individuals or single institutions than on any overall strategy for improving education planning in the country. One has the impression that Tanzania's inclusion in this or that IIEP project is based less on any analysis by Government or IIEP of what Tanzania most needs from the Institute, than on the unplanned outcomes of a series of international research projects or sub-regional initiatives of different kinds. This may then not add up to a significant contribution to sustained capacity building at national level. Some credence is perhaps given to this interpretation by IIEP's own difficulties in supplying the consultants with a complete checklist of IIEP interactions with Tanzania.

This last problem is of course one faced by any agency not organised on a country-desk or country-programme basis. On the more substantive point IIEP rightly argues that it possesses comparatively limited resources and can only involve itself in integrated programmes of capacity building in educational planning and management at the invitation of partner countries and where there is a strong positive desire for such help. As explained earlier in this report the situation in mainland Tanzania has not been conducive to this in recent years.

Responsibility for any lack of focus lies as much, or more, with senior policy makers in Tanzania as with IIEP, since IIEP can only offer assistance when requested to do so. Earlier in this case study report, some of the factors leading on the Tanzanian side to a less intensive dialogue between Tanzania and IIEP were outlined. It seems to the consultant that there would be a case for IIEP initiating a review with the ministries in Dar es Salaam and Zanzibar

of their priority needs and of IIEP's capacity to respond, so that future co-operation could be planned on a strategic basis. It is recognised that IIEP could hardly do this for its 150 partners worldwide, but perhaps the approach could be tried, if it has not been already, with its major partners like Tanzania.

Bearing these caveats in mind, one is bound to say that although education planning enjoys high respect in Tanzania, which seems to be in part the result of the IIEP connection, the mainland system has not recently exhibited much sense of purposeful strategic direction: more a sense of drift and malaise. It has proved impossible to formulate and pursue national targets for the education system, and the new national policy, promulgated in 1995, contains a number of unrealistic commitments. The mainland system has been struggling to produce a Master Plan for Primary Education for about three years, so far without success. Under the leadership of a new minister and principal secretary since the 1995 elections, an attempt is now being made to inject a greater sense of urgency and purpose into the management of education, but it is too early to form judgments on the prospects of success.

The stagnation, and in some respects the retreat, in education is of course part of a much wider developmental malaise in Tanzania. The economic record has been very undistinguished and the country is beset by a mountain of debt and severe deficits on its public accounts. It is heavily dependent on assistance from abroad and the international financial agencies and external donors often appear to be calling the development tune. If assistance to educational planning has not been particularly effective in Tanzania, it is by no means the only developmental activity of which this is true. External assistance in general to Tanzania does not have a record of which to be particularly proud.

In private conversation, a number of the present and former professional education planning staff in the mainland system also attribute some blame to the Ministry leadership for the failure to plan the system coherently and purposefully. As already stated, the involvement of IIEP in the development of education planning in mainland Tanzania does appear to have created among the planners a degree of professional identity and pride and a perception of how things could and should ideally be. They complain of a lack of constancy and consistency at the top and frequent changes of minister and principal secretary, with each new ministerial appointee having his or her own 'pet' notions and projects. This, allied with the lack of funds to operate the system properly or for personal emoluments, has created apathy and even despair. Any evaluation of IIEP's influence on education planning in Tanzania has also to take this broader context into account.

The situation in Zanzibar is rather different from that on the mainland. International perceptions are that while mainland Tanzania is coping tolerably with the process of democratisation and liberalisation of the economy, Zanzibar is doing less well, with allegations that its electoral process has been flawed and opposition supporters harassed. In education, by contrast, the direction appears to have been firmer and more purposeful in Zanzibar than on the mainland. In part this no doubt reflects the greater manageability of a small-country system. Interestingly, the political and professional education leadership in Zanzibar has had a heavy exposure to IIEP. The Minister, the Principal Secretary and the Director of Planning have all been on the ATP, and freely acknowledge their debt to IIEP, and the Commissioner for Education is an enthusiastic and appreciative participant in the SACMEQ project. In a

small country IIEP's training, if focused on really able individuals, can have an impact quite disproportionate to the actual numbers trained.

In neither part of the United Republic does educational planning seem to have caught up with the thinking in the Government's own Social Sector Strategies which speak of decentralisation, liberalisation, participation and client-centredness, financial reform and cost-sharing. This requires a shift from control to enablement, from the world of directives to that of incentives. On at least three occasions senior Tanzanians made the point to the consultant that these strategies would require a considerable amount of staff development and that Tanzania needed more opportunities for training regional and district planners and others at local level in view of the drive to decentralise.

Unfortunately, educational planning generally in Tanzania appears to be interpreted in a limited and old-fashioned way and remains rooted in state-dominated ideologies with absolute primacy accorded to central government initiative. Sida's own policy statement on Cooperation in Basic Education and Education Reform foresees that the changing role of the state requires a questioning of many past assumptions, even if its normative and financial roles will remain important. IIEP itself has frequently drawn attention to the changing context of educational planning, but its recent interactions with Tanzania through training and research do not appear to have involved dialogue or co-operative work on the current planning problems of budgetary constraint, of decentralisation and of 'liberalisation' of education to allow market forces and the private sector greater play. Of course, a project like SACMEQ does offer the prospect of incorporating important new qualitative dimensions to educational planning at least at primary level.

There is a new agenda here which is a challenge to Tanzania's public service and to those like IIEP who would help it develop. Are the present modalities of work and materials of IIEP equal to this task, or will Tanzania have to look elsewhere? Perhaps Dr Buchert's Sida/IIEP study of education policy implementation in Tanzania will provide a platform for a new, and even pathbreaking, co-operative relationship between the Institute and educational planning in that country.

Peter Williams
17 October 1996

TANZANIA: TRACE OF IIEP TRAINEES**A. THE TRACE**

Status of Contact	I T C			A T P		
	Zanzibar	Mainland	Tanz'ia	Zanzibar	Mainland	Tanz'ia
<u>Returned Questionnaire</u>						
Interviewed	1(1)	12(1)	13(2)	1(1)	1	2(1)
Not interviewed	-	4(1)	4(1)	-	-	-
Total	1(1)	16(2)	17(3)	1(1)	1	2(1)
<u>Not yet returned Questionnaire</u>						
Q'aire left tr'nee office -	-	2	2	-	-	-
Total	-	2	2	-	-	-
<u>No contact by Consultant</u>	-	-	-	1	-	1
Total in Sample	1	18(3)	19(3)	2(1)	1	3(1)

Figures in brackets denote number of females included in totals

N.B. In addition 1 male research fellow interviewed and completed questionnaire.

+ Of these two, one was up-country on a field visit in both July and September

x Could not be contacted by consultant but should eventually receive questionnaire mailed by IIEP.

B. STATUS CHANGES OF PARTICIPANTS SINCE IIEP PROGRAMME

Status of employment since IIEP Prgrmmme	I T C			A T P		
	Zanzibar	Mainland	Tanz'ia	Zanzibar	Mainland	Tanz'ia
1. Changed employer						
Left education	-	1	1	-	-	-
Still in education	-	4	4	-	-	-
Sub-total	-	5	5	-	-	-
2. Same employer						
Different Job	1(1)	4	5(1)	2(1)	-	2(1)
Same Job	-	8(1)	8(1)	-	1	1
Study Leave*	-	1(1)	1(1)	-	-	-
Sub-total	1(1)	13(2)	14(3)	2(1)	1	3(1)
Total in sample	1(1)	18(2)	19(3)	2(1)	1	3(1)

* This female, on study leave abroad, is unsure whether she will return to the same job or be given a different posting once her course is completed.

N.B. In addition one Research Fellow with same employer in same job at July 1996

Appendix 5**ZIMBABWE CASE-STUDY****1 Introduction**

Zimbabwe was chosen as part of the follow up and evaluation of Sida support to IIEP because it was one of the Sida partner countries in Africa which receives support for its education. Zimbabwe has only been independent for a comparatively short period (16½ years at the time of the visit) and has benefited from all of IIEP's main programmes: individuals have been on the ATP, on ITCs, it has a partner institution, it has some depository libraries and it has been involved in some research initiatives. The consultant, Kees Maxey, visited Zimbabwe between Friday 19th. and Wednesday 31st. July 1996 inclusive. He spent the second weekend in Namibia, and so divided his time for interviews between the two weeks. This turned out to be advantageous as some people who were not available in the first week could be interviewed in the second week.

The consultant has had a long term personal interest in the political situation in Zimbabwe from before independence in 1980. He has had an ongoing, but not detailed, interest in the education system. He has visited the country every two or three years, the last (but very brief) visit being in 1994.

He was provided by IIEP with a list of those who had attended the Annual Training Programme (ATP) and the Intensive Training Courses (ITCs) or had been Visiting Trainees or Fellows at the Institute in Paris. He was not provided with a list of seminars and workshops. He was also given the names of the four depository libraries in Zimbabwe and an introduction by the Director of IIEP to the Permanent Secretary of the Ministry of Education and Culture, the Head of Department of Educational Administration at the University of Zimbabwe (which has a partnership agreement with IIEP) and the Chief of the Sub-Regional office of UNESCO.

2 Background

Zimbabwe emerged from white settler rule in 1980 with the country devastated by the effects of a vicious rural war, with some hundreds of thousands of people being refugees in Mozambique, Zambia, Botswana or internally in Zimbabwe, and with a large part of the rural infrastructure (including very many schools) having been destroyed. One of the major areas of contention before independence had been education. The new government came in with a commitment to universal basic education.

In an interview with the two consultants, a former Minister of Education and Culture (Ms. Fay Chung) who in the early 1980s was a senior Ministry official, described how at Independence the Ministry did not even know where the schools were and certainly had no idea of where new ones should be built. The skills to plan and put into place the new education policy were almost completely absent. IIEP has been very important in providing some of these skills. The first Zimbabwean trainee to attend the ATP started in October 1979, shortly before the independence agreement had been negotiated. More trainees followed in 1980/81, 1981/82 and 1983/84.

In the late 1980s, the education ministry was split into the Ministry of Education and Culture,

covering primary and secondary education, and the Ministry of Higher Education, covering tertiary education. The Planning Department went over to the latter ministry so the Ministry of Education and Culture had to build up another one from scratch.

By the beginning of 1990, nearly three times as many children were going to primary school and ten times as many to secondary school as ten years previously. However other issues began to come to the fore:

- * The cost;
- * The quality of the education being provided; and
- * The difficulty of getting to the next stage - from primary to secondary - from secondary to tertiary (and particularly, to University) - and from tertiary to a suitable job.

The cost issue was given particular point by the Economic Structural Adjustment Programme (ESAP) of the early 1990s. Officially, primary education is compulsory and, until 1991, there were no fees. With ESAP, that was no longer possible and tuition fees were introduced in 1992 - at twice the rate in urban areas as in the rural areas. Furthermore, parents are more and more expected to pay for the equipment and books needed. In essence, from being a priority which has resulted in Zimbabwe spending a proportion of its GNP on education which is one of the highest in the world, education is now being cut back severely in all areas.

This is the context in which IIEP's training and research programme has been operating in Zimbabwe.

3 Individuals interviewed and contacted.

The consultant spoke to a total of 28 people divided into three main groups of people:

- * Those who had been on one of IIEP's training programmes from the beginning of 1990;
- * Those responsible for the Zimbabwe end of IIEP links - the four librarians and the head of the Department of Educational Administration, University of Zimbabwe;
- * Those who were in a position to have a view about the work of IIEP.

The majority of the individuals to whom the consultant wished to speak were based in Harare, and so there was little difficulty in contacting and speaking to most of them. However there were a number who were based in other parts of the country. It was considered important to speak to those people in order to get a view away from the centre. There was some difficulty in making calls to some areas. For example, many attempts were made to speak to some ATP and ITC trainees in Chinoyi, but without success due to the lack of telephone lines from Harare.

3.1 IIEP's Training programme

A total of 32 individuals (four of whom were women) attended the following events, some more than one, since the beginning of 1990:

Annual Training Programme	7
Intensive Training Courses	44
Visiting Fellow or Trainee	2

Of these, 23 were based in Harare (though one was doing a 2½ month course in the UK), seven in various other parts of Zimbabwe, one was on academic leave of absence in South Africa and the whereabouts of one was unknown. A total of 23 were interviewed (four by telephone and one in the UK) and completed questionnaires were received from 19. Apart from those who studied in Paris (the ATP and the Visiting Fellow and Visiting Trainee), a total of 9 ITCs were attended, of which, three were held in Zimbabwe. One of these was large (with an attendance of 38, nearly half of whom came from Zimbabwe itself). The others were much smaller. In addition, though the consultant did not have the relevant details with him when he was in Zimbabwe, there were a number of international seminars to which Zimbabweans were invited.

3.2 IIEP - Zimbabwe links

The Institute has a formal partnership agreement with the Department of Educational Administration at the University of Zimbabwe - and the consultant had a meeting with the head of department as well as with two members of staff.

There are also four depository libraries to which IIEP sends all of its publications and documents. Librarians at all four were interviewed.

3.3 Other interested people

Unfortunately, the Permanent Secretary at the Ministry of Education and Culture was in hospital and was not available for interview so the consultant saw another senior official in his stead. This individual had also been to an ITC and was involved in a research project. The consultant was able to see a number of others, in senior positions (including a former Permanent Secretary at the Ministry), those who had heard about the Institute by reputation, and finally a head teacher who was able to describe the Zimbabwe education system as a practitioner.

4 What former trainees are doing now

One important objective of the visit to Zimbabwe and of the questionnaire sent to the former trainees was to ascertain their present occupation. Although only 14 of the questionnaires were returned (five out of seven from ATP students, two out of two visitors and only seven out of the 23 who had attended the ITCs), the interviews covered a number of these gaps (so that in only eight cases were there neither interviews nor returned questionnaires). In addition, information about well over half of the others was known to those who were interviewed.

It is therefore possible to compare the employment of the former trainees before they went on a course and at the time the consultant was in Zimbabwe. This is indicated in the Table I below (number of women in brackets).

Table I Employment of former trainees before and after course

Course	Before Course			After Course						
	MEC	MHE	UZ	MEC	MHE	UZ	Other Min.	NGO, etc.	Private Sector	Un-known
ATP	(1)5	1	(1)1	3	1	(1)1		1	(1)1	
VT or VF	1		1	1		1				
ITC	(2)17	3	3	(1)11*	2	2	2	2	1	(1)1
Total	(3)23	4	(1)5	(1)15	3	(1)4	2	3	(1)2	(1)1

*This includes the examinations branch (2) which has very recently been made a parastatal.

MEC = Ministry of Education and Culture; MHE = Ministry of Higher Education;

UZ = University of Zimbabwe; NGO = Non governmental organisation

As can be seen, the majority of those who have attended courses over the past 6½ years are still with their sending organisations. They are also all engaged in very similar work. Two have moved (one each from the MEC and the MHE) to the Ministry of Transport and the Ministry of Finance. One from the University of Zimbabwe is on leave of absence at a university in South Africa. Three people from the MEC are now working with an NGO or with two intergovernmental agencies. The latter two are still involved in education - it is not known about the former. Two, also from the MEC, are in the private sector, one working in a similar area to his work in the MEC (adult non-formal education) and the other on a freelance basis, with education and development projects.

It seems fairly clear that those who have benefited from IIEP training are still in a position to use the skills and knowledge that they have gained in education.

5 The Interviews

Table II showing who were interviewed is given below (the number of women is indicated in brackets).

Table II Number of people in each category interviewed

ATP	VT or VF	ITC	Pre-1990 ATP or ITC	Others	Librarian
(2)5	2	12	2	4	(2)4

In addition to the two people who had attended training courses before 1990 (one each to an ATP and an ITC), one of those who had been to a post 1990 ITC had also been to an ATP in the early 1980s. Several of the others (from most categories) had been to ITCs before 1990. Thus a wide range of experience of IIEP training ranging back over the previous decade was represented by those speaking to the consultant.

5.1 Former Annual Training Programme students

Five out of seven who had been on courses from 1989/90 plus two others who had been on ATP courses in the early 1980s were interviewed. Not all had received their questionnaires and were given another with the request that it be completed. They were overwhelming in

their conviction that their IIEP training had been of great value to them. Only one expressed serious doubts about the worthwhile nature of the course. This former trainee felt it was too long and only the most senior officials should go on it. Someone who was as junior as this individual was quite unable to put into action anything learnt. However, for most, the practical nature of the programme was the essential element. Many said that before the course they were working completely in the dark. For example, one commented that he had not known the reason for the statistics that he had to collect from the schools for onward transmission to the head office. The study visits were particularly noted as an important part of the programme. However at least one trainee said that the non-French visit should have gone to a less developed country, more like Zimbabwe. Others felt that the visits to Austria and Switzerland provided them with useful target models and taught them possible ways of approaching common problems.

There was some debate about where the ATP should take place. Some trainees felt that such a course need not be held in an expensive western place such as Paris - and suggested that the distance made it difficult to remain in touch with the Zimbabwean conditions. If it were in Africa, the context and the challenges would be more appropriate and relevant to them. It would also be cheaper so that more people could be trained. However one trainee commented that he had found the experience of living in the capital city of a great imperial power, and visiting others, of great help now that he has to negotiate with donors. He is able to do so on a much more equal footing because he knows where they come from.

The academic status of the course, whether it should result in an academically validated Diploma, was brought up by several individuals. One person said that he was not listened to as he should be because he had no recognisable academic evidence of his training. Another felt that one problem with the course was that the various elements did not come to a conclusion. Each element was distinct and were not brought together to form a coherent whole. He felt that an academic discipline would have forced the course to be more coherent. Another comment was that an academic discipline would make some of the others who did not take the course seriously, do so. However this view was not unanimous.

However there was near unanimity that the accommodation should be specified by the Institute in advance. At the moment, trainees are asked to state a preference. Unfortunately, some of the preferences are expressed in ignorance of the reality of a large European city in winter. Some students found themselves isolated in comparatively expensive accommodation with an 8 month agreement. There were also critical comments about the timing of the French language teaching and its quality. It was held too late in the day and did not start soon enough in the course. There were no complaints of racism although this question was specifically asked.

There was also general agreement that the French/English divide among students was significant to begin with, but that after a time, particularly after the study visit, it broke down and the group had greater cohesion over all. One described the tendency for his year to sing at the slightest opportunity!

There is no doubt that, despite some critical comments, all of the former trainees spoken to gained a great deal. They learnt practically, but they also learnt to look over the borders of

Zimbabwe to see what was happening elsewhere. They stated that a number of the activities they were involved in would not have been performed without the training they had received from an IIEP course. More than one senior person who had not been on the course themselves spoke of the improvement in understanding, width of view, practical ability and performance of returning trainees.

5.2 Visiting Fellow and Visiting Trainee

Only two of those interviewed were short term visitors to IIEP in Paris - and their comments will be noted in the general discussion in order not to breach confidentiality. One went from a regional office of the MEC and the other from the University of Zimbabwe.

5.3 Intensive Training Courses

Nine ITCs were attended between the beginning of 1990 and 30 June 1996 on 45 occasions. The courses are shown in the Table III below (the number of women indicated in brackets).

Table III Intensive Training Courses

ITC Nos	Subject of course	Date	Zimbabweans attended
66	Education, employment and human resource development	9/92	3
69	Design of basic education programmes and projects	11/92	3
70	Data building and data management	9/92	(2)18
75	Institutional management in Southern Africa	9/93	2
76	Data processing and policy report preparation	8/93	(1)6
92	The preparation of a project plan for SACMEQ*	9/94	5
99	National Research Coordinators meeting on SACMEQ	2/95	4
113	Institutional management in higher education for Eastern and Southern African countries	3/96	2
115	Second meeting of National Research Coordinators for SACMEQ	4/96	2

*SACMEQ is the Southern African Consortium on the Measurement of Educational Quality.

As can be seen, there were a series of meetings (ITC92, 99 and 115) on the SACMEQ research project. ITC 70 was also part of this series. This will be discussed below under Research.

The major reaction of most of those attending these courses was one of very considerable enthusiasm. The international nature of the meetings, the opportunity to meet with others and exchange experiences with professional colleagues at an equivalent level of experience and responsibility was particularly valued. In most cases, the attendees were involved in many practical exercises and work. In some cases they used material they brought with them from Zimbabwe themselves. In other cases, authentic material was provided by those running the workshops. In most cases, they described not only new insights and understandings but also ways in which they had developed aspects of their work with the new knowledge they had acquired. One person said: 'On both courses, it was very striking 1) how our problems were similar and 2) one shares with colleagues who are professionally and in terms of jobs, all at the same level. It is a collegial kind of programme. The interactions were very very fruitful.' Another person was inspired by an ITC experience to go on to do an MA in Educational

Planning at the Institute of Education, University of London. Following a recent ITC in Kenya, another is intending to present the Zimbabwean education statistics in a form easily understandable by politicians and the general public. In this way, he said, an informed debate on educational policy can take place. However some (especially in the regions) explained that they did not feel they could progress further or to put into effect the ideas they had learnt about because conditions were not right or they did not have the necessary resources.

Probably the course which received the most criticism was ITC70 on data management held at the University of Zimbabwe in Harare in September and October 1992. There were clearly problems with the organisation at the Zimbabwean end. Comments ranged from those of one person who was centrally involved that there were simply too many people present to the two people who said that they got little or nothing out of it because they came with no knowledge at all of computers. Some of the delegates from the other countries were said not to be serious. However some did get an idea of what was possible from the careful collection and recording of data. In addition, one major consequence of the workshop was the beginning of the process which launched the Southern African cooperation on the collection of data on the quality of primary education in the region. This eventually resulted in the formation of the Southern African Consortium for Monitoring Educational Quality (SACMEQ).

Another comment made by a number of people was the disappointment that there was no follow up of many of the courses. They felt that they had lost the skill they had begun to learn or their enthusiasm. One did, however, say that he thought that possibly this was the responsibility of the Ministry, rather than of IIEP.

5.4 Seminars and Working Groups

Although information about these were not received until after the consultant visited Zimbabwe, they constitute an important aspect of IIEP's involvement with that country. The meetings with which Zimbabwe was involved are given Table IV.

Table IV Workshops and seminars

S Nos	Subject of meeting	Date	Number attended
S110	Textbooks and learning materials	11/90	1
S113	Seminar on training institutions	12/90	2
S116	Textbook development for primary education in Africa	11/91	2
S118	Educational forum on student loans in Africa	6/91	(1)2
S125	Collaborating for educational change in non-formal basic education	1/92	(1)4
S134	IIEP/UNICEF seminar on education for all three years after Jomtien	9/93	1
S150	Budgetary procedures in the ministries of education in three English speaking-African countries	10/94	(1)3
ditto	ditto	4/95	(1)3
ditto	ditto	11/95	(1)3
S151	Planning science education provision at secondary level	8/95	4

S Nos = Seminar number

S113 and S150 were held as part of the partner institution project and the research into budgetary procedures respectively and will be referred to in sections 5.6 and 5.5 below.

S118, on student loans, was one of a series on this topic covering four parts of the world (Western Europe and the USA, Asia, Latin America & the Caribbean and Africa) in which participants gave papers describing the schemes in their own countries and discussed possible ways forward. While the consultant was in Zimbabwe, the issue of student funding was becoming a serious issue. Demonstrations by students on the issue took place. The consultant happened to meet the senior civil servant responsible for the issue and was told that the Government was about to review the present scheme (which has been in place since about 1981). However he did not refer in any way to the forum or to any lessons learnt from the seminar held in 1991.

5.5 Research projects

The consultant was aware of three research projects in which individuals from Zimbabwe were involved:

Indicators of the quality of primary education in Zimbabwe;
Indicators of the quality of primary education in Southern Africa (SACMEQ); and
Harmonising budgetary processes in Africa.

The first two are closely linked and will be discussed together.

All of these projects appeared to be centred on the MEC and not on the partner institution to IIEP, the Department of Educational Administration at the University of Zimbabwe. The major project was the measurement of educational quality in the country's primary schools. The consultant was told that this was initiated by IIEP to take account of the concern for Education for All at the Jomtien Conference and the need to monitor quality as well as quantity. As noted above, the educational debate is changing and, following the massive and basically successful expansion of primary education, there is a growing concern to look at both the quality and the relevance of the education being given. The whole of the initial project took place over an 11-week period in 1991 with the collection of data taking place over a period of 6 weeks from a very carefully selected sample of schools and children at Grade 6. The excitement of those involved was particularly centred on the realisation that data could be collected in such a short time on a scientifically designed sample which could be well defended as representing the whole. The idea of extending this to the region appears to have come to the fore at ITC 70 on data building and data management in September 1992.

In a subsequent ITC (76), a group of education ministry professionals from Botswana, Malawi, Swaziland, Zambia, Mauritius, Lesotho and Tanzania joined colleagues from Zimbabwe with the support of two consultants (academics) sent by IIEP. This group analysed the data from the Zimbabwe study of its Grade 6 pupils and wrote a report which not only drew conclusions from the data but made a series of specific recommendations arising from it. It was at this meeting (in August 1993) that the specific proposal was made to conduct a sub-regional but directly comparative study of the quality of primary education, and with it, to bring SACMEQ into existence. At meetings in July and September 1994 (ITC92) and February 1995 (ITC99), the project plan was elaborated, the instruments for collection of the data agreed (no easy task with several countries involved in the study) and concurrently in the second half of 1995 the data was collected. This was done with the strong professional and technical support of the Institute. However the consultant was told separately by several

interviewees that there was no feeling that this process was in any way forced on them by the Institute. There is a great deal of praise for the role IIEP has taken, but a recognition that the future progress depends on the role players in the region, with IIEP acting as a technical advisor.

One interviewee commented that IIEP had not trained a local person to manipulate the data so that after it had been entered, the disks had to go backwards and forwards to Paris for further work. However, IIEP responded that it had been requested by the SACMEQ countries that all the data should be placed in the same format in Paris so that all the cooperating countries could use all the data without having to change the variable names, file specifications, etc. Additionally, it would be done in an internationally acceptable manner.

This description may give the impression that there have been few problems in Zimbabwe with the project. This would not be true. When it started, particularly with the 1991 study of the Zimbabwe primary schools, both the Minister and her Permanent Secretary were strongly supportive. However with changes in the leadership at a senior level, the climate of support at the top level changed to a lack of interest if not actual opposition to it. There have been further changes and it seemed to the consultant that the present climate is more positive. However the past lack of support, and the departure of some of those originally involved from the MEC, has resulted in a slowing down of the project.

Despite this, there is no doubt about the commitment of a number of individuals within and outside of the Ministry to the project and the feeling of ownership of it. Those who have been involved with it have learnt a great deal about the importance of a scientific approach to making measurements, the usefulness of the information gained and the need to institutionalise the structures so that the whole process is not just a 'one-off'.

The conclusions and recommendations made as a consequence of the 1991 study were presented to the Permanent Secretary of the time and the Heads of Division in the MEC. All of the proposals which had been formulated at ITC76 (August 1993) were considered and some have been implemented. The data which, for example, showed the actual number of textbooks in the schools, was unknown at the time. The then Permanent Secretary found the results of the survey gave him, as a senior administrator, an insight into what was happening in individual schools. As a consequence, schools began to have greater expectations and make greater demands. Some of the proposals have been implemented, such as the provision of mobile libraries for rural schools.

In the third research project listed above, three officials, one each from the MEC, the MHE and the Ministry of Finance are involved in a study with colleagues from Swaziland and Zambia to carry out a comparative study of the budgetary process in their three countries. This involves a harmonisation of definitions and reporting. The consultant was told that the initiative for this came from IIEP following earlier work in French-speaking West Africa. However the two Zimbabweans interviewed felt that they were on an equal footing with the Institute. The ownership of the data and the results remain with the southern African ministries. One direct consequence of the research was the greater interaction between the three Zimbabwe Ministries involved. It has helped senior officials in the Ministries to look at their budgets and to see how it can be used as a means of policy control. One person involved

said that the input and discussion was more usefully technical as compared to the SADC meetings which tend to be more political.

It is important to note that, apart from the opportunity to travel to the consultation meetings, those working in these three research projects described above do not gain financially from the exercise. None were paid an extra consultancy fee. In reality, their time was either their own or it was donated by their employers. They may gain professionally (though that is not certain) and they all said they had gained intellectually and learnt a great deal from involvement.

5.6 Partner Institution: Department of Educational Administration, University of Zimbabwe

The consultant met with the Head of Department and with some of its lecturers. The Department has signed a partnership agreement with IIEP in July 1991, indeed it was one of the earliest to do so. At the workshop (S113) held in December 1990 which finalised the scheme, there were two representatives from the University of Zimbabwe. Unfortunately, neither was in Zimbabwe when the visit was made.

The partnership agreement has as its objective the 'mutual strengthening' of both institutes for 'human resource development in the field of educational planning and administration.' Considerable detail is given in the seven-page agreement of the programme which it states is for 'joint/collaborative research, staff exchange, staff development, exchange of training materials and dissemination of research findings and other printed materials to interested professionals'. The five-year agreement was due to renewal for 24th. July 1996, but there is no indication that this has happened.

The Head of Department said that the Department was charged with the training of those within the education service, from senior administrators to head teachers. The value of IIEP was that of giving a world view, a world perspective. It could help countries like Zimbabwe participate in the educational debates which were taking place in other countries so that it could learn from them. He felt that there was a need for more members of the Department to have an international experience. He described the beneficial impact of IIEP training on the one member of the department's staff who had recently been on the ATP. Another had just completed a PhD in which the major part of the study was done in Scandinavia. He was concerned about the level of research in the Department. He did not mention any specific attempt to benefit from either training or research links with IIEP. However there was an attempt a few years ago with the support of IIEP to develop a masters in educational administration. However, due to academic and other upheavals in the Department, including the exodus of staff which had had IIEP training in the past, these attempts seem to have come to nothing.

In conversation with others within the Department, there appears to be little effective contact with the MEC. Thus the Masters' dissertations, which are often on planning and administration issues in Zimbabwe's schools system, are not passed to the Ministry for their consideration and possible use. The same was true in the other direction and one lecturer commented that knowledge of the SACMEQ project was only gained from the IIEP in a training session, not from the MEC. This is despite personal contacts between senior civil servants and even some ministers who had been taking academic courses at the University.

The Head of the Department commented on the value of IIEP publications and documents. Those that were available in the Department for student use had been provided personally by one of those who had been in Paris. As will be described later, the books which are supposed to be sent to the Department as part of the depository library scheme were nowhere to be seen.

The one seriously attempted co-operation with IIEP was the organisation of ITC 70 on Data Management and Data Building in 1993 which was held at the University of Zimbabwe. As has been reported above, the organisation appears to have been poor.

5.7 Dissemination

5.7.1 Depository Libraries

As far as IIEP is concerned, there are four depository libraries in Zimbabwe, all in Harare.

The sub-regional centre of the UNESCO has a small but well run library and IIEP publications are regularly used. Apparently the main users are from the University, both students and staff, with some others from the Ministries and other UN agencies.

The MEC library also has the IIEP publications which are clearly in use, but it is behind in accessioning the set of books sent last year. This library can be used by workers in the MEC and those doing education at the University. It is not available, for example, to the Ministry of Higher Education.

The main University of Zimbabwe library receives the books and have some 200 to 250 IIEP publications and documents in their international collection. They are heavily used, particularly by students from the Faculty of Education. The library does not allow the books to be borrowed, they are only for reference purposes.

The consultant was not able to locate the books which are sent to the fourth depository library at the Department of Educational Administration. The designation of this library was a direct consequence of the partnership agreement between the Department and IIEP. The Department head thought that they had been received by the Faculty of Education library (which is reasonably large and seems well run). However the librarian there that she had not received any in her time, there were no volumes to be seen on the shelves and when the consultant looked up some of the more prolific IIEP authors, there were no cards in the index for them. The main university library has not receive these in addition to their own.

The Gweru College of Education, which is about to get University status, and the Chinoyi Technical College, which does teacher training, were suggested to me as additional possible depository libraries. The newly established National University of Science and Technology in Bulawayo (based on the former Polytechnic there) is also a possibility.

5.7.2 IIEP books for personal use

IIEP will supply books free to former students. However the majority, even of the former ATP students, did not realise this and said that they were not prepared to go through the horrendously bureaucratic process of getting the necessary foreign exchange to purchase

them. It was pointed out to the consultant in one of his telephone interviews that the provision of books for personal use is particularly important to those in the provinces who are not able to get to Harare and borrow from one of the depository libraries.

5.7.3 IIEP Newsletter

There was general enthusiasm for the IIEP Newsletter. A particularly valuable and appreciated aspect of the Newsletter was the international perspective it gave on educational issues. Readers said that they felt that they were being kept up to date with some of the current thinking in the field. One or two people also get the DAE Newsletter. It did occur to the consultant that in view of the close relationship between the two organisations, that the two newsletters should be circulated together in Africa.

5.8 **Other comments**

The major contact the consultant made was with the MEC. This Ministry had to rebuild its planning department and both former and present senior officials described the importance of IIEP training in building up the Ministry's planning capacity at both central and regional level. According to one, when individuals come back from the ATP have better ideas on how to plan Zimbabwe's education and they are better practitioners.

This view is given some confirmation in a study (for a doctorate) on 'Policy, Evaluation and Leadership. The Context of Educational Change in Zimbabwe' by Anne Welle-Strand (1996). She said:

'IIEP had played an important role in the education system in Zimbabwe. Some interviewees clearly stated that IIEP convinced them that planning and evaluation was important. It was said that when the issue of evaluation entered into policy documents, it came from professionals, and IIEP was mentioned. Several interviewees also mentioned, as a positive factor, that IIEP had included the Ministry of Education in their research. SIDA had contributed with money to send a person to IIEP every year, in order to update capacity, and to increase competence of evaluation in the Ministry. More than half of the Planning Officers had been trained at IIEP's 8-months course in Paris.' (page 114).

The study, which was based on extensive interviews with a wide range of administrators and planners from the MEC at both central and regional level, identified a degree of confusion and lack of contact between the different levels, partly caused by changes in education policy. Anne Welle-Strand also reported that although there was a strong feeling that more training was needed, it was felt that 'too often were scholarships to study abroad given, instead of investing in the Zimbabwean higher education.' (page 115)

6 **Conclusion**

The main contact with IIEP is through the two Ministries, particularly the MEC. The special relationship of the Department of Educational Administration with the Institute does not seem to have had a great deal of practical effect. The one ITC held in the Department had considerable organisation problems. There seem to be no joint research programmes and the Department is barely aware of the joint programmes with the Ministry (such as SACMEQ).

The attendance of one of its staff on the ATP programme was important to the department - but seems to be seen as a one-off. The visit of the other lecturer to IIEP was organised quite independently of the Department. Few members of the staff have been to the ITCs. The books for the depository library do not even get there! This is a matter of concern as the concept of 'Training of trainers' is part of the basis of the partnership scheme. It is not clear why the relationship is not working. It may be because of weakness in the Department, but it may also be that not enough long-term priority is given by IIEP to building up the relationship. The contact between the Department and the Ministry is minimal other than as an institution for government officials to gain training and qualifications.

In general, most of those who have been on the various courses have remained in the Ministries (or Departments) of Education - even some of those of long standing (although the consultant made no attempt to contact all of the pre-1990 graduates). Half of those who have moved out have remained firmly in education. However those who do get this experience of IIEP training remain a tiny proportion of the whole. The joint research projects have certainly captured the imagination of most of those involved. There is evidence of some problems with the SACMEQ project in Zimbabwe - but there also seems determination to keep it on course. This does not all depend on Zimbabwe or on IIEP. The results of the research done in Zimbabwe have been and are being of directly practical value for improving the effectiveness of the planning capacity of the Ministries.

The value of the training and the contacts that people have through IIEP is of great personal and professional value. Time and time again the consultant was told of initiatives that had been taken, of a widening of view and a determination to evaluate and understand much of the statistical data which flows through the Ministry. This was because of the experience of the ATP or the ITCs. This professional benefit is being translated into more effective work within the Ministries.

However this experience will only be more widely available if it is institutionalised. The training institution, which in Zimbabwe is the Department of Educational Administration at the University of Zimbabwe, is crucial and the weak link needs to be addressed. On the other hand, SACMEQ is providing a regional framework which has the potential to give strength to planners in surviving the changes in the Ministry of any particular country.

Kees Maxey
22 October 1996

Appendix 6

ATP Questionnaire

Text on cover page:

"CONFIDENTIAL

UNESCO IIEP

INTERNATIONAL INSTITUTE FOR EDUCATIONAL PLANNING
7-9 rue Eugène-Delacroix, 75116 Paris

Tel (331)/45 03 77 00 Fax:(331)40 72 83 66 Cables: Eduplan Paris Telex: 64 00 32

FOLLOW-UP STUDY ON FORMER PARTICIPANTS
IN THE IIEP ANNUAL TRAINING PROGRAMME

QUESTIONNAIRE

It is recommended that you read through the whole questionnaire
before replying to the questions. If you need
more space, please add extra pages.

* * *
— —

Kindly return the completed questionnaire, **not later than July 10, 1996**,
to Mr. Lars Mählck, UNESCO-International Institute for Educational Planning,
7-9, rue Eugène-Delacroix 75116 Paris

SECTION I: BASIC INFORMATION ABOUT THE PARTICIPANT

- 1.1 Training year: 19 -- / 19 --
- 1.2 Trainee's country of origin:
- 1.3 Trainee's name:
- 1.4 Kindly indicate below where you worked and the position you held *immediately before coming to the IIEP* and then give the same information concerning your *present situation*.

	Before training at IIEP
<i>Organization/institution</i> (e.g. Ministry of National Education, University of X..., etc.)	
<i>Department/division</i> (e.g. Planning Department, Primary Education Department, etc.)	
<i>Title of your post</i> (e.g. Department Head, Senior Planning Officer, Regional Education Officer, etc.)	

Explain briefly what were your main responsibilities in this post

.....

.....

.....

.....

1.5 Please give the *same information* concerning your *present position*

	Present position
<i>Organization/institution</i> (e.g. Ministry of National Education, University of X..., etc.)	
<i>Department/division</i> (e.g. Planning Department, Primary Education Department, etc.)	
<i>Postal address :</i>	
<i>Title of your present post</i> (e.g. Department Head, Senior Planning Officer, Regional Education Officer, etc.)	

SECTION II: YOUR RESPONSIBILITIES AND ACTIVITIES AFTER YOUR TRAINING AT THE IIEP

2.1 On what date did you take up your present *post*?

2.2 Immediately upon your return to your country after your training at the IIEP, did you *rejoin the post* you held before, or did you get another post?

► Same post ☐ Another post ☐

- 2.3. Describe briefly your professional career *since your training at the IIEP*. Indicate the different post(s) with the corresponding duties (including your present post already mentioned in Section I.)

<i>Posts and dates</i>	<i>Organization/ Institution</i>	<i>Department/ Division</i>	<i>Title of post</i>
Present post From 19 -- to 1996			
Previous post 1 From 19 -- to 19 --			
Previous post 2 From 19 -- to 19 --			
Previous post 3 From 19 -- to 19 --			
Previous post 4 From 19 -- to 19 --			

- 2.4 Describe in more detail your *present duties* by indicating below your three principal tasks *in order of importance*:

1st task:

.....

.....

2nd task:

.....

.....

3rd task:

.....

.....

- 2.5 On returning to your country, after your training at IIEP, did you encounter any difficulties in *reintegrating* in your professional environment?

Not at all ☐ Not really ☐ Yes, some ☐ Yes, a lot ☐

If yes, what kind of difficulties

.....

.....

.....

- 2.6 Do you believe that your participation in the IIEP Annual Training Programme *has had* any effect on your:

	Not at all	Not much	Yes, to some extent	Yes, very much	Do not know
a) Professional competence?					
b) Professional recognition/esteem?					
c) Career progress?					

Please explain: a)

.....

b)

.....

c)

.....

2.7 Do you believe that your training at the IIEP *is likely* to have any effect during the *coming 1 or 2 years* on your:

	Not at all	Not much	Yes, to some extent	Yes, very much	Do not know
a) Professional recognition/esteem?					
b) Career progress?					

Please explain: a)

.....

b)

.....

2.8 Have there been any occasions since you left the IIEP, when you have felt that your training at the Institute has proved of practical benefit to you in your work?

yes ☐ no ☐

If yes, could you give two examples. *If no*, please comment upon your answer

.....

.....

.....

.....

- 2.9 Have you since your return tried to recommend or introduce any idea, concept or technique picked up at the IIEP?

yes ☐ no ☐

If yes, can you give two examples

.....

- 2.10 Since your return from the IIEP, have you attended any training programme or course in the fields of educational planning, administration or management?

yes ☐ no ☐

If yes, please specify topic and length (in weeks or months):

.....

- 2.11 *If you have left the field of educational planning and administration:*

a) Please comment on the *reasons for your move* :

.....

b) What *aspects of your training* at IIEP, if any, have *proved useful* to you in your current work?

.....

SECTION III: EVALUATION OF IIEP ANNUAL TRAINING PROGRAMME IN RETROSPECT

3.1 Looking back at your stay at IIEP, how do you judge each of the main objectives of the Annual Training Programme in relation to your present professional needs?

The main objectives of the Annual Training Programme are as follows:	Importance of objectives compared to your professional needs				Extent to which you consider they were achieved			
	Not important	Less important	Important	Very important	Very little	In part	Well	Very well
a) to acquaint participants with the main ideas concerning the relationships between the educational system, its environment and socio-economic development								
b) to improve the participants' knowledge and practice of the methods of diagnosing, forecasting, administering and evaluating the educational system								
c) to give participants an opportunity to analyze and compare educational policy and plan formulation and implementation processes								
d) to give each participant an opportunity to study a planning issue of particular interest to his/her country								

3.2 What do you consider to be the most *valuable aspects* of your training at the IIEP?

.....

.....

.....

.....

3.3 Was anything important missing that you would have liked to see included in your training at the IIEP?

yes ☐ no ☐

If yes, please specify:

.....

3.4 What are your views on the training approaches and methods used in the IIEP Annual Training Programme?

.....

3.5 Are there any *comments* you would like to make about *life in Paris* (e.g. accommodation, food, social life, separation from home, etc.) and whether this affected positively or negatively your ability to benefit from the training programme?

.....

3.6 With regard to your experiences, referred to in question 3.5, what *support services* provided by IIEP or others were *most helpful*? What suggestions would you make for improving support arrangements?

.....

SECTION IV: CONTACTS WITH IIEP AFTER THE TRAINING PROGRAMME

4.1 Have you *received the IIEP Newsletter* regularly since your return home?

yes ☐ no ☐ occasionally ☐

4.2 What is your opinion of the *usefulness* of the IIEP *Newsletters* you have received?

Not very useful	Slightly useful	Useful	Very useful
☐	☐	☐	☐

Comments on questions 4.1 and 4.2:

.....

.....

.....

4.3 As an ex-trainee, you are entitled to order new IIEP *publications* free of charge. Have you *placed any such orders* since you returned home?

yes ☐ no ☐

If yes, approximately how *many times* have you *placed an order*?

4.4 What is your opinion of the *usefulness* of the IIEP *publications* you have received?

Not very useful	Slightly useful	Useful	Very useful
☐	☐	☐	☐

Comments on questions 4.3 and 4.4:

.....

.....

.....

4.5 Have you had *other contacts with the IIEP* since your departure?

	Yes	No
▶ Participation in IIEP short training courses or workshops	☐	☐
▶ Participation in IIEP research seminars or workshops	☐	☐
▶ Participation in IIEP Policy forums	☐	☐
▶ Participation in IIEP research studies	☐	☐
▶ Occasional contacts with IIEP staff members or consultants on mission	☐	☐
▶ Contacts with former IIEP course participants from your own country	☐	☐
▶ Contacts with former IIEP course participants from other countries	☐	☐
▶ Correspondence with IIEP or its staff	☐	☐
▶ Others (please specify)	☐	☐

.....

.....

Comments on your reply to question 4.5

.....

.....

.....

.....

4.6 Are you a member of a national association of former IIEP trainees?

yes ☐ no ☐

Comments:

.....

- 4.7 Have you *any suggestions* about i) *assistance or services* which the *IIEP could provide* within the framework of your professional activities, or ii) any desirable new form of contact between IIEP and its former trainees (please add a separate page, if needed).

.....

.....

.....

.....

.....

SECTION V: ANY OTHER COMMENTS

- 5.1 Is there anything else you would like to add?

.....

.....

.....

.....

.....

.....

Thank you very much for your co-operation

See indications on cover page for return
of completed questionnaire

Appendix 7 ITC Questionnaire

CONFIDENTIAL



INTERNATIONAL INSTITUTE FOR EDUCATIONAL PLANNING
7-9 rue Eugène-Delacroix, 75116 Paris

☎ (331)/45 03 77 00 Fax: (331) 40 72 83 66 Cables: Eduplan Paris Telex: 64 00 32

**FOLLOW-UP STUDY ON FORMER PARTICIPANTS
IN IIEP MEETINGS, RESEARCH AND OTHER ACTIVITIES**

QUESTIONNAIRE

It is recommended that you read through the whole questionnaire
before replying to the questions. If you need
more space, please add extra pages

*_*_*

Kindly return the completed questionnaire, **not later than July 24, 1996**
to Director, UNESCO Office, P.O. Box HG435,
8 Kenilworth Road, Harare - Tel: (4) 73.30.21

1. Basic Information about the Participant

1.1 Name:

1.2 Address:

.....

.....

1.3 Telephone:

Fax:

Email (as available):

2. Academic Record after leaving Secondary School

Month and year started	Course and Qualification	Length of Course	College/University
.....			
.....			
.....			

3. Employment since beginning of 1990 (or last two jobs)

3.1 Present job:

Date started	Department & Organization (e.g. <i>Planning Dept., Ministry of Education</i>)	Title of Position
.....		
.....		
Main Responsibility:		
.....		
.....		

3.2 Last job:

Date started	Department & Organization (e.g. <i>Planning Dept., Ministry of Education</i>)	Title of Position
.....		
Main Responsibility:		
.....		
.....		

4. Meetings, workshops and forums attended

- 4.1 The IIEP is responsible for a range of *different activities* - the Advanced Training Programme, Visiting Trainees and Researchers in Paris, Intensive Training Courses, Workshops and Seminars in the various countries in the regions. We would be interested to know what meetings or study (other than the eight-month Advanced Training Programme) *organised by the IIEP* or with its assistance *you have been involved* in from the beginning of 1991.

Type of meeting (e.g. <i>ITC, forum, Visiting Fellow</i>)	Dates (e.g. <i>June 1995</i>)	Place (town & country)	Title (Subject of meeting)
.....			
.....			
.....			

4.2 Please indicate by a *tick* the *benefit* or otherwise of these meetings:

	Not at all	Not much	Yes, to some extent	Yes, very much
To broaden understanding of educational issues by contact with colleagues from other institutions and/or countries				
To help in the understanding of specific technical issues, techniques and problems				

4.3 What *parts of the meeting* or meetings *were of most use* to you?

.....

4.4 Please give a *specific example*, if you have one, of how an idea or technique you
acquired at a meeting that *benefited in your subsequent work*?

.....

**5. If you worked on an IIEP sponsored research project, please answer the
questions below:**

5.1 Subject of the research:

.....

5.2 Period of research (beginning and - if completed - end):

.....

5.3 Location of research:

.....

5.4 Leader of the research project:

.....

5.5 Would you indicate your *views* about the *work you have been doing*?

	Of no use	Of some use	Useful	Of great use
Value of subject of the research to your country				
Value of techniques learnt to yourself				
Value of IIEP involvement to the research project				

5.6a Please give a *specific example*, if you have one, of the use of the results of the research in your country or educational system.

.....

.....

.....

5.6b Please give a *specific example*, if you have one, of how you have used or benefited from, a research technique or experience.

.....

.....

.....

6. If you have left the field of educational planning and administration:

6.1 Please give the *reasons for your move*:

.....

.....

.....

6.2 What *aspects of your training* with IIEP, if any, have *proved useful* to you in your current work?

.....

.....

.....

.....

7. “IIEP Newsletter” (available quarterly from Paris without charge)

7.1 Do you *receive the IIEP Newsletter*?

yes ☐ no ☐ occasionally ☐

7.2 If you do receive it, what is your opinion of its *usefulness*?

Of no use	Of some use	Useful	Very useful
☐	☐	☐	☐

7.3 If you *do not receive it, would you like to*?

yes ☐ no ☐

8. Is there anything else you would like to add?

.....

.....

.....

.....

.....

.....

Thank you very much for your co-operation

See indications on cover page for return
of completed questionnaire

Appendix 8

Sida/IIEP agreement - 1990-1992

Appendix and 1st. financial agreement

*An agreement between SIDA and IIEP for the period
1 January 1990 to 31 December 1992*

The International Institute for Educational Planning and the Swedish International Development Authority share a common concern in promoting international cooperation in the area of educational planning and administration.

Both IIEP and SIDA consider that priority should be given to strengthening the institutional capacities of developing countries through research, training and dissemination programmes. More specifically, that in the area of research, a particular priority should be given to extending the coverage and improving the quality of education for all - both youth and adult - through conventional and non-conventional approaches to education. In the area of training, particular priority is attached to the IIEP Annual Training Programme, IIEP specialised training courses and the promotion of extra-mural activities to strengthen *Administrative, Planning and Research* capacities of developing countries. In the area of dissemination, special attention will be given to:

- (i) Ensuring wider access to documents produced by IIEP.
- (ii) Forums and meetings involving various actors in education and more systematic support to documentation centres in developing countries.

Within the framework of the priorities defined by the IIEP Medium-Term Plan, the following will be of particular importance:

Research :

Primary education, conventional and non-conventional approaches to basic education for children, youth and adults (innovative experiences; factors of retention and success; methods of monitoring progress and conditions through indicators; planning and finance).

Training :

ATP (experimenting with and developing new modules), intensive training courses (monitoring of qualitative aspects, preparation and evaluation of education projects, innovative non-conventional approaches), research workshops (basic education and literacy, secondary education, institutional management in higher education).

Dissemination : Information, dissemination and documentation

Documentation centres, policy workshops and forums, and the Fundamentals of Educational Planning series.

PROPOSAL FOR A VOLUNTARY CONTRIBUTION OF
S.I.D.A. TO I.I.E.P. FOR 1990

Estimated Contribution: SKr 4 000 000 or US\$ 651 000

1.42.0 IIEP

	Total Project Costs	Proposed SIDA Contribution	Para. In 28GB/5
	\$	\$	
TRAINING			
1. Annual training programme in educational planning (US\$ 22 000 per trainee X 14)	675 000	308 000	21-22
2. Training of trainers in micro-planning and the school map	95 000	21 000	30
3. Intensive training course on the use of micro-computers at the regional level in the Philippines	85 000	16 000	32
4. Intensive training course on education, work and human resource development in East Asia	75 000	20 000	33
5. Research workshop on Planning the production and distribution of textbooks and teaching materials	100 000	25 000	41-42
6. Resident Research Fellows' Programme	70 000	20 000	45
TOTAL, Training	1 100 000	410 000	
	=====	=====	
RESEARCH			
7. Research on educational financing	75 000	40 000	68-74
8. Research on the management of institutions of higher education	70 000	25 000	75-78
9. Research on planning the provision of science education in secondary schools	100 000	30 000	88-94
TOTAL, Research	245 000	95 000	
	=====	=====	
10. DISSEMINATION	650 000	50 000	103-118
COMMON PRIORITY AREAS FOR ACTION			
11. "Training of Trainers" for institutional development	75 000	40 000	New
12. The collection of key indicator data in basic education	180 000	41 000	New
TOTAL, Common Priority Areas	405 000	81 000	
	=====	=====	
13. ADMINISTRATION	617 000	15 000	119-122
GRAND TOTAL	3 017 000	651 000	
	=====	=====	

Appendix 9 Sida/IIEP agreement 1993-June 1994

APPENDIX

An agreement between SIDA and IIEP for the period
1 January 1993 to 30 June 1994

SIDA (Swedish International Development Authority) and the IIEP (International Institute for Educational planning) continue to join hands in actively promoting international cooperation in educational planning and administration in the context of economic and social development. The common concern of SIDA and IIEP is to support the developing countries' in their efforts to improve their own situation. The goal is to achieve long-term sustainable development. This is why both SIDA and IIEP, in cooperation with institutions in developing countries, are undertaking and promoting such activities that aim at strengthening national capacity in planning, managing and developing their educational systems.

Within the framework of the IIEP Medium-Term Plan (1990-95), the following activities will be of particular importance during the years 1993 to 1994.

TRAINING

The Annual Training Programme has proved to be a high-quality advanced course for educational planners from many countries and has, to a large extent, contributed to the high reputation of the IIEP. Former participants constitute the backbone of the IIEP network, (so important for its other training and research activities) and upon which SIDA has relied on several occasions for its bilateral assistance programmes.

During the period of the eighteen months' agreement, contentwise, the improvements will focus on the enhancement of the participants skills in diagnosis and policy analysis, administration and management. The new structure of the course - a common core; two streams and specialised units - will be maintained with more flexible access open to participants whose needs could be addressed by one stream or some modules.

In the light of the results of the research programme, new modules will be experimentally introduced.

Training of Trainers' Programme

The high priority given to the establishment of a network of training institutions in the Training of Trainers programme will remain during the coming years and the Institute will continue to developing its effort in this area. However, in order for the partners institutions of IIEP to keep an active role in our programme, it is planned to concentrate and expand the size of our commitment on a limited number of institutions. The emphasis in the training of trainers programme will be put on (i) training of the national institutions' staff, (ii) development of training materials to be used by the training institutions and (iii) involvement of national institutes staff in IIEP training programmes.



Specialised Training Courses (Regional, sub-regional and national)

Among *recently introduced* courses the following ones are to be continued:

- . Design of educational development projects
- . Basic indicators of monitoring

Moreover, courses will be launched on an experimental basis in the area of administration and management such as "Institutional Management in Higher Education", and "Methods of Budgeting".

Resident Fellows Programme

The Institute had to put more focus on the objectives of Resident Fellows Programme by revising the duration of the stay of the fellows to less than three months and by insisting that they contribute in a significant way to the IIEP programme. The intention is to pursue the work for the coming years on the same limited scale.

Training materials

The emphasis will be on testing the developed materials with different training formulas and in different contexts. They will be validated in experimental courses, issued in different languages and put at the disposal of, in the first place, IIEP "partners institutions". Moreover, new training materials will be elaborated in the following areas: (i) Management of higher education (ii) Budgeting techniques (iii) Utilization of information and (iv) Crucial issues in Teacher Management.

RESEARCH AND STUDIES

The conduct of research and studies as well as the organization of research workshops in cooperation with national teams are crucial both for strengthening national capacity and for adapting and vitalizing all IIEP training programmes.

IIEP will continue to focus on the research areas of its Medium-Term Plan, i.e. on the development of "Basic Education", "Human Resource Development", "Financing Strategies/Mechanisms", "Organization and Management" and "Comparative experiences in educational planning". Given the increasing demand of developing countries in *capacity building*, the IIEP will put more emphasis on related topics within the priority areas of its Medium-Term Plan, i.e., in particular, on issues of staff management, budgetary techniques and information management.

For all research programmes currently under implementation, a special effort will be made in 1993 and 1994 to finalize or consolidate on-going activities (development of training materials, organization of research workshops, dissemination of results through publications, seminars and forums).

In addition, a special attention will be given to the needs to *assist countries to develop and maintain their own systems for monitoring the progress and conditions of education.*

With this in mind, research and studies will be pursued on the design of (i) systems of data collection and analysis, (ii) training programmes, and (iii) models for exchange of information between policy-makers, planners and school administrators at various levels.

If the necessary financial and human resources become available, the Institute will give more attention to research and studies in the areas of "gender education", "distance education" and the "issue of exclusion of youth".

INFORMATION - DISSEMINATION - DOCUMENTATION

The creation of an Interactive Information Network

A network of what might be called 'IIEP depository libraries and documentation centres' is being established in developing countries, for the most part to be supplied free-of-charge with full or partial collections of IIEP titles on an on-going basis. The intention is to have no more than three or four 'depository libraries' in each developing country, although in some very small countries it will be less than this and in some very large countries it will be more. The largest concentration of centres, corresponding to the needs, will be in Africa (followed by Asia and Latin America), but if sufficient resources become available the network will be extended to selected countries in eastern and central Europe. The intention is that this initiative will naturally develop into an *interactive* network, underlining the importance of information collection and the exchange of data in the field of educational planning and administration. This would be in line with the considerable effort already made in the past two years in developing the impact and scope of the *IIEP Newsletter*, a quarterly journal which is now distributed in 9,500 copies to members of the IIEP network and is recognised as a primary source of information and communication in educational planning and administration. The IIEP, as the leading centre for training and research in this area, is hoping to play a prominent role in promoting the necessity for a free exchange of information between different countries and different regions of the world.

Forums and Meetings

With its well-developed yet informal network of co-operating institutions and specialists in all regions of the world, IIEP is in a favourable position to organise workshops on subjects of special topical interest for the educational community. Such workshops provide an opportunity for specialists, academics, decision-makers and representatives of the media from different countries and regions to come together and benefit from diverse approaches to particular issues. In this way, the Institute plays a crucial role as a centre for the development and exchange of new ideas and concepts in education. The outcomes of these discussions are made available in published form.

Fundamentals of Educational Planning

SIDA is the "father funder" of the booklets in this series which over the years have become the "flagship" (the most prestigious and widely distributed) of the IIEP publications. The booklets in this series are written primarily for two types of clientele: those engaged in educational planning and administration, in developing as well as developed countries; and others, less specialized, such as senior government officials and policy-makers who seek a

more general understanding of educational planning and of how it is related to overall national development. They are intended to be of use either for private study or in formal training programmes.

During the biennium 1993-94, the Institute will further develop and diversify its series of "Fundamentals" on the basis of both current relevancy and long-term value to its readership. It is to be recalled that eight major areas are covered in this series:

1. Education and development.
2. Equity considerations.
3. Quality of education.
4. Structure, administration and management of education.
5. Curriculum.
6. Cost and financing of education.
7. Planning techniques and approaches.
8. Information system, monitoring and evaluation.

ADMINISTRATION

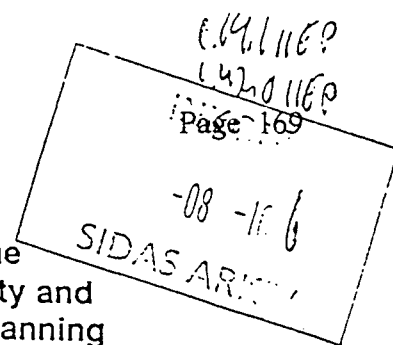
The Institute includes in its yearly budget an amount for staff development (in-service and re-training) and for upgrading the facilities for the production of materials and the documentation centre. These items of expenditures, foreseen under the Administrative Budget, could be financed every year at their modest level, thanks to the acceptance of SIDA to affect a small part of its voluntary contribution to Administration.

**IIEP ACTIVITIES SUGGESTED FOR FINANCING
BY THE SIDA GRANT IN 1993**

Agreed contribution: SKr.5,500,000 or US\$820,900

	Total Project Cost US\$	Contribution from Sweden US\$	Ref. in 1993 Prop. Prog. (paragraphs) US\$
TRAINING			
1. Annual Training Programme in Educational Planning & Administration (18 trainees:US\$25,000 x 18)	1 000 000	450 000	20-25
2. Strengthening co-operation with training institutions in developing countries	100 000	50 000	28-34
3. Intensive Training Courses on the design of programmes and projects in basic education	100 000	60 000	42-44
4. Preparation of teaching and learning modules and materials	180 000	70 000	51-58
5. Resident Research Fellows	110 000	50 000	61
RESEARCH			
6. Improving the quality of education	210 000	40 900	65-73
7. Development of human resources	145 000	30 000	91-99
8. DISSEMINATION	957 000	60 000	113-126
9. ADMINISTRATION	380 000	10 000	143
TOTAL	3 682 000	820 900	

Programme of co-operation between the
Swedish International Development Authority and
the International Institute for Educational Planning
(period July 1994 - June 1996)



I. OVERALL OBJECTIVES, STRATEGY AND PROGRAMME JUSTIFICATION

1. Development Objective:

To promote effective educational planning in developing countries by strengthening their national capacities for planning and managing sustained development of their educational systems.

2. General strategy:

To achieve this long-term objective, the following strategy has been adopted. A series of activities, closely related and designed to reinforce each other, has been drawn up in four major areas: (i) The international training programme of long duration; (ii) specialized intensive training courses and workshops; (iii) applied research and studies; (iv) institutional development, including training of trainers projects. Each of these areas or components are described below in terms of immediate objectives to be achieved during the next two-year period, their content and target groups.

3. Justification:

The promotion of educational development in the poorer countries of the southern hemisphere, remains a major priority for both SIDA and the IIEP. Institutional support may facilitate and accompany national undertakings, but they can never replace them. During recent years SIDA and IIEP have had to review some of the assumptions behind their support to developing countries in so far as what works or does not work in development co-operation. Based on this experience, more realism in the design of development strategies can be achieved and more reasonable expectations held as to the time needed to introduce changes through national and sub-national institutions.

Investment in human resources, staff training for national capacity building and institutional development, is still the most valid and "safe" avenue for development support. This is clearly reflected in this proposal for co-operation between SIDA and the IIEP where the training component is put in the forefront. The proposal tries to strike a balance between activities that SIDA has already supported - activities which have proved relevant and effective, and should therefore be strengthened - and new activities or topics to be experimented.

II. THE INTERNATIONAL TRAINING PROGRAMME

1. Immediate Objectives:

(i) To train 60-70 full-time participants in educational planning and administration by means of the IIEP's "Annual Training Programme (ATP)", during the two-year period being considered. This training programme, which lasts for 8 months, addresses itself to officials working at the central or regional levels in their home countries. At least 50 per cent of the participants will come from Africa. On average 30-35 participants will attend the ATP on a full-time basis every year.

(ii) To organize training in educational planning and administration for about 30 'visiting trainees' who will participate in the Annual Training Programme during its specialization phase. The duration of the training will vary between 2 weeks and 4 months, depending on the needs of the individual participants.

2. Content and Organization:

The IIEP Annual Training Programme in educational planning and administration is well respected throughout the world and there is a very high demand for participation in this programme from Member States in all regions (in particular from the Horn and Southern Africa, from Central Asia and from Southern Asia). The quest to create a programme which can cater for qualified short-term visiting trainees who cannot absent themselves from their work for a long period of time, is now being met by the new programme structure, that is a common core, two streams, and a large number of self-contained modules. During the specialization phase of the ATP, about 20 per cent of the participants will be visiting trainees. This is expected to enrich the ATP. The introduction of two streams in the ATP, i.e. basic education and education for development, has proved to be valid and relevant to the diversified needs of Member States and will be consolidated. However, closer interaction between the modules of the two streams needs to be developed. Further improvements underway or foreseen concern the strengthening of training elements in educational management and administration; the use of computers in diagnosis and forecasting etc. and the standardization of the didactic materials used.

III. INTENSIVE SPECIALIZED COURSES

1. Immediate Objective:

To train about 230 planning and administration staff in specialized areas of educational planning and management through sub-regional or national training courses of short duration (2-3 weeks).

2. Content and Organization:

These intensive training courses are especially designed for a sub-region or a country and targeted at officials who cannot be away from their work for more than a few weeks. Half of the courses will take place in the African region. Most of the courses organized by the IIEP are sub-regional, with half of the participants from the host country and half from some 5-6 neighbouring countries. During the period of the biennial agreement, the IIEP will:

- (i) up-date the content and methods of courses by building on the existing experiences of the IIEP and organize such courses in sub-regions and countries that have not yet benefited from them.
- (ii) pursue the testing, validation and development of new courses based upon the findings of the IIEP's on-going research programme.

Examples of courses coming under the first heading and which will be confirmed, are:

- Design of Educational Development Projects
- Institutional Management in Higher Education.

New training courses or workshops, based on ongoing research programmes, will be launched in the following two areas:

- Financing and management of technical education and vocational training.
- Information systems for teacher management.

IV. **APPLIED RESEARCH AND STUDIES**

1. Immediate Objective:

To conduct research and study activities and organize research workshops in order to strengthen national capacities in research and development work and to adopt and vitalize IIEP training programmes.

2. Content and Organization:

The activities of IIEP's research and studies programme are designed in close co-operation with national institutions and, to a large extent, implemented by national research teams. The results are first published in the form of research reports and then, in most cases, further adjusted and elaborated to serve as training materials in courses, workshops and seminars.

During the period of the new biennial agreement, the research programme will focus on (i) completing and pursuing on-going activities; (ii) requests for support from Member States that are consistent with the IIEP priorities and its current Medium-Term Plan; (iii) preparatory work for the identification of research/study programmes in the forthcoming Medium-Term Plan.

The first research activity proposed for SIDA support is a project on decentralized mechanisms for the management of school quality. It builds on the findings of the inter-regional project on the improvement of basic education services and on the project on collaborating for educational change. This new project focuses on the main mechanisms of decentralized management which have a direct impact on the quality of school management:

(i) inspection and supervision systems; (ii) school-based monitoring mechanisms with focus on the role of the headmaster; (iii) social accountability processes involving the parents and the community.

The second research and study activity proposed, deals with the financing of secondary education after Jomtien. This project sets out to examine the cost implications of increasing demand for secondary education after the successful implementation of the basic education policy. It will also explore the financial challenges presented in different types of developing countries and will, finally, analyze the range of possible policy responses.

The third activity suggested is a research forum on planning the provision of science education in secondary schools. This forum will be based on the findings of the research project with the same name which has been supported by SIDA from its very beginning. It is expected that the forum will focus on (i) advantages and probable costs of different policy options and strategies and (ii) on ways in which the existing information could be improved so as to lead to a better control of the teaching of sciences.

~~IV~~ INSTITUTIONAL DEVELOPMENT

During the period of the new biennial agreement, priority will be given to the following two objectives:

Immediate Objective 1:

To enhance the capacity of individual training institutions in developing countries to organize courses in educational planning and management and prepare and deliver adequate training materials in this field. Priority will be given to the twelve training institutions in Africa, Asia and Latin America who have signed a partnership agreement with IIEP. The exact magnitude of joint activities depend to a large extent on requests from individual institutions and will be specified during the first part of the new SIDA/IIEP co-operation agreement.

Immediate Objective 2:

To intensify the interaction and create synergy between these partner institutions in the southern hemisphere. More specifically, the IIEP will organise, with SIDA support, at least one workshop to gather its partnership institutions around a topic of common interest (monitoring the quality of education, decentralization of education and its implications for national training institutions etc.).

2. Content and Organization:(i) Training of trainers for institutional development

The high priority given to the Training of Trainers programme will remain during the coming years and the IIEP will continue to develop its efforts in this area. Though it is important to maintain the current, relatively large, network of training institutions in developing countries, the IIEP envisages intensifying its co-operation with a selected number of institutions to achieve a higher multiplier effect. The following activities, aimed at reinforcing the capacities of individual training institutions, are underway or being planned: (i) inviting small teams of trainers to participate in specialized modules of the Annual Training Programme and intensive courses and workshops in the field; (ii) developing a specialized module for training of trainers; (iii) dissemination of training materials to training institutions together with trainers' guides (as has already been tried out in the Caribbean project); and (iv) reinforcement of training institutions by associating their trainers with the implementation of operational activities (for example, development projects).

(ii) Distance education training of trainers for institutional development

IIEP has given impetus to distance education modes to supplement traditional training courses both for cost effectiveness reasons and with a view to better responding to the diversified training needs of education officers at central, regional and local levels. The study of non-traditional delivery systems in higher education which is currently being launched will ascertain the current state of affairs and also relate particularly promising experiences also for the training of people in management and planning. Another example is the recently-launched programme of disseminating compact self-instruction modules on selected subjects. (The first modules are on "Planning the development of textbooks" and on "Follow-up and tracer studies"). The dissemination of these materials will be undertaken in close association with those training institutions in developing countries which have signed an agreement of co-operation with IIEP.

The possibility will also be examined of presenting in book form, some of the material in the series of instructional modules on "Planning the development of textbooks". Such a book would continue to place emphasis on the growing role and responsibility of the educational planner in this area, highlighting the financial and management aspects facing educational authorities in the production and distribution of school textbooks, and would include examples taken from the experiences of a wide range of developing countries.

(iii) Training Materials

Most of the IIEP's training materials are not of a complete self study distance type as referred to above. But the Institute certainly moves in this direction. It is obviously easier to develop purely self-learning materials for the acquisition of technical skills than in issue-oriented areas. Many of the Institute's training modules planned or currently developed are more structured and self-contained than in the past. The new training materials are tried out both in the Annual Training Programme and Intensive Training Courses and Workshops and increasingly in co-operation with the Institute's "Partner Training Institutions". The preparation and testing of such materials during the coming two years cover the following themes :

- micro-planning (particularly involvement of local authorities, parents, community; management and processing of information at the local level etc.)
- methods of human resources planning
- budgeting management
- institutional management of higher education

At the same time, the series "Fundamentals of Educational Planning" will continue to enjoy a priority in the IIEP programme. The present pattern of production (about 4 titles a year) backed by a small editorial committee will be pursued.

PROPOSAL FOR A VOLUNTARY CONTRIBUTION OF SIDA
TO IIEP FOR THE PERIOD 01 July 1994 - 30 June 1996

TRAINING	1994	1995	1996	TOTAL
1. Annual Training Programme in educational planning (15 trainees)	150 000	300 000	150 000	600 000
2. Two workshops on budget preparation in African sub-regions (one English/one French)	25 000	25 000	—	50 000
3. Intensive sub-regional training courses on institutional management of higher education (in two sub-regions)	—	14 000	14 000	28 000
4. Intensive sub-regional training course on the design of development programmes/projects (Southern Asia/Southern Africa)	—	30 000	30 000	60 000
5. Workshop on financing technical/vocational training (English-speaking Africa)	45 000	—	—	45 000
6. Workshops on information systems for teacher management two sub-regions)	—	10 000	10 000	20 000
7. Resident Research Fellows Programme	—	10 000	5 000	15 000
RESEARCH				
8. Research on decentralization mechanisms for the management of school quality	30 000	40 000	16 000	86 000
9. Research on the financing of secondary education after Jomtien	—	50 000	10 000	60 000
10. Research Forum on planning the provision of science education in secondary schools (Southern Africa)	20 000	—	—	20 000
DISSEMINATION				
11. The fundamentals of Educational Planning	15 000	35 000	15 000	65 000
12. Administration	8 500	15 000	8 500	32 000
13. "Training of Trainers" for institutional development	—	40 000	10 000	50 000
14. Distance education	—	55 000	25 000	80 000
15. Teaching materials	—	26 000	13 000	39 000
TOTAL	US\$ 293 500 SK2 113 200	US\$ 650 000 SK4 680 000	US\$ 306 500 SK2 206 800	US\$ 1 250 000 SK 9 000 000

Appendix 11 'Policy for Sida Cooperation in Basic Education and Education Reform'

EXECUTIVE SUMMARY

1. The overall objective of Swedish development cooperation is to improve the living conditions of poor groups and individuals. Support to education is a cornerstone in Sida's strategy for the achievement of the poverty reduction objective.
2. Sida's basic education policy is guided by both the overall objective of Swedish development cooperation and by the "World Declaration on Education for All" (Jomtien, 1990), which declares that education is "a fundamental right for all people throughout the world".
3. Particular attention is paid to equity issues regarding the education of girls and women, people living in neglected social groups or geographic areas, and children with special education needs.
4. The policy takes into consideration the context of change during the 1980's and 1990's at national and international level which affects participation in education, the perceived and actual relevance of the education provided, and education outcomes. This context is described in terms of economic austerity, the cultural dimension, the changing role of the state, education and the world of work, and population growth and urbanisation.
5. Economic austerity, including structural adjustment programmes, have had negative effects on education, especially on teachers' salaries and the supply of educational materials. Attempts to improve education finances by increasing direct parental contributions have increased disparities in the quality of education and access to education.
6. The world is moving towards a global culture which encroaches upon the school's role as an agent of cultural transmission and as a vehicle for socialisation into national values.
7. The state has been seen as the major driving force for development and has been the major provider of education and training in most developing countries since independence. The role of the state in education and training is being called into question on ideological, financial and efficiency grounds. Two responses are apparent: increased decentralisation and increased privatisation. However, the state continues to be the major financier of education and is secure in its normative role.
8. There is a complex relation between education and the world of work but some trends can be noted. There is an increased awareness of the importance of the informal labour market; of the difficulty of providing relevant vocational training in formal education institutions; and of the erosion of the number of formal sector jobs and salaries. The implications for education are unclear but the strongest responses are to strengthen basic education, to review the content of adult education programmes and NGO programmes and to shift responsibility for training to the workplace.
9. Population growth and urbanisation are making it difficult to match the provision of education to the needs of the population. In some countries the education systems do not have sufficient finance to expand at the same rate as the population.

10. The negative effects of the above trends can be seen in increasing disparities in education provision and participation in and between countries and, in the poorest countries, falling quality of education.

11. Non-formal education has been harder hit than formal education due to declines in already small expenditures on non-formal education. There are, however, exceptions to this such as NGO programmes in Bangladesh, and government supported literacy campaigns in Ecuador, Namibia and India.

12. Taking into account the macro-conditions for education, Sida has three main objectives for development cooperation:

- to support broad reform processes,
- to raise the quality of education at basic level, and
- to support the provision of basic education for previously neglected groups and for people living in neglected geographic areas.

13. Support to reform processes takes into account three aspects of education reform: policy reform, financing of education and institutional development. In all cases, the qualitative improvement of learning and teaching processes in the classroom should be kept in focus as should the impact of the reforms on participation in education, especially of girls and women. Analyses and design of programmes should increasingly be guided by their impact on the classroom situation.

14. Basic education is defined by Sida as a set of knowledge, skills and attitudes necessary for participation in the cultural, economic, political and social life of communities. Basic education includes both school-based education and non-formal education programmes for out-of-school youths and adults. This level of education is the main priority area for Sida and the two main concerns are quality and access. Currently, Sida gives more emphasis to quality than to access.

15. Sida also gives support to further and higher education. Three principles guide this support: it is necessary for the achievement of education for all, teachers and administrators being trained at this level of the system; it is a part of institutional development which is included in Sida support to most sectors; and it is necessary for technological development and research.

16. Sida has two main strategies for support to basic education and their importance varies with the relative economic standing of the countries concerned. First, there is a strategy for support to the general qualitative improvement of education, for example support to national teacher training programmes and the provision of educational materials. Secondly there is a strategy for support to particularly under-privileged groups. This second strategy is most commonly used in the relatively better off countries where there are clearly identifiable groups who are under-served by the education system, for example language and ethnic minorities, plantation and commercial farm workers, people living in isolated communities and children with special learning needs. In many countries, women and girls are clearly identifiable as a target group.

17. Education is a social process and therefore solutions to problems of access and quality have to be context specific. The priority areas for Sida's cooperation in education in developing countries are therefore decided on a country-by-country basis and rest on an analysis of the specific situation, consultations with the Government's representatives, usually the Ministry of

Education, and with consideration to the support given by other donors and international development banks.

18. The main areas for Sida's support to basic education are the production and distribution of educational materials, curriculum development, teacher education, adult and non-formal education, school construction and educational planning and management. There is no implicit order of priorities in this list nor in the following list regarding the content of education.

19. As regards the content of education, particular attention is paid to gender issues, special needs education, environmental education and health education, especially HIV/AIDS education. Sida has an increased interest in giving support to curriculum development in core curriculum areas such as mathematics, science and language, including mother tongue and bilingual education, and to support the improvement of teaching and learning processes in the classroom.

20. Sida's cooperation in the field of education is usually regulated by specific sector agreements in which sub-sector support is defined. Sida also participates in joint financed projects with other donors, the World Bank and UN agencies. Sida is willing to contribute to the overall financing of national reforms of education in cooperation with other agencies under a new mechanism for sector programme support. The guidelines for such sector programme support are summarised in Appendix 1.

21. This policy document has been prepared by the Education Division, Sida, in collaboration with the education programme officers in Sweden's embassies in development cooperation countries. The document is based on a wealth of experience and on the many official documents, evaluations and reports that have been generated by Sida, the development cooperation countries, international agencies and researchers over the last decade. Specific references are listed in Appendix 2.

Appendix 12 IIEP TRAINEES BY SIDA'S PROGRAMME COUNTRIES (1965-1996)

COUNTRIES	PERIOD:1965/66 - 1969/70 (5 years)						PERIOD: 1970/71 - 1979/80 (10 years)											T O T A L
	1 9 6 5 / 6 6 6	1 9 6 6 / 6 7	1 9 6 7 / 6 8	1 9 6 8 / 6 9	1 9 6 9 / 7 0	T O T A L	1 9 7 0 / 7 1	1 9 7 1 / 7 2	1 9 7 2 / 7 3	1 9 7 3 / 7 4	1 9 7 4 / 7 5	1 9 7 5 / 7 6	1 9 7 6 / 7 7	1 9 7 7 / 7 8	1 9 7 8 / 7 9	1 9 7 9 / 8 0	T O T A L	
INDIA			1			1		2				1	1		2	2	8	9
TANZANIA			2	1	1	4				1	1	1	3	2	3	1	12	16
ZIMBABWE						0										1	1	1
BANGLADESH						0		1			1		2		1	1	6	6
BOTSWANA						0											0	0
ETHIOPIA				1		1				1			1		1	1	4	5
GUINEE BISSAU						0							1				1	1
MOZAMBIQUE						0										1	1	1
NAMIBIA						0											0	0
SOUTH AFRICA						0											0	0
SRI LANKA				1		1	1		1			1	1		1	1	6	7
ZAMBIA						0				1		1					2	2
ANGOLA						0											0	0
CAMBODIA						0			1	1	2						4	4
ERITREA						0											0	0
KENYA			1	1		2				1	1		1	1		1	5	7
LAO						0											0	0
NICARAGUA						0											0	0
PALESTINE						0											0	0
UGANDA					1	1								1			1	2
VIET NAM				1		1	1				2			1			4	5
TOTAL	0	0	4	5	2	11	2	3	2	5	7	4	10	5	8	9	55	66
OTHER NON SIDA	7	14	17	18	21	77	18	22	29	31	37	39	31	35	33	37	312	389
TOTAL TRAINEES	7	14	21	23	23	88	20	25	31	36	44	43	41	40	41	46	367	455

COUNTRIES	PERIOD:1980/81 - 1989/90 (10 years)											PERIOD: 1990/91 - 1995/96 (6 years)							T O T A L
	1 9 8 0 / 8 8 1	1 9 8 1 / 8 8 2	1 9 8 2 / 8 8 3	1 9 8 3 / 8 8 4	1 9 8 4 / 8 8 5	1 9 8 5 / 8 8 6	1 9 8 6 / 8 8 7	1 9 8 7 / 8 8 8	1 9 8 8 / 8 8 9	1 9 8 9 / 9 9 0	T O T A L	1 9 9 0 / 9 9 1	1 9 9 1 / 9 9 2	1 9 9 2 / 9 9 3	1 9 9 3 / 9 9 4	1 9 9 4 / 9 9 5	1 9 9 5 / 9 9 6	T O T A L	
INDIA	2	2	2	2	2	1			1	1	13	1				2		3	16
TANZANIA	1	2	2	2	1	1	1	1	1		12	1	1	1				3	15
ZIMBABWE	1	1		1						2	5	1	1	1		2		5	10
BANGLADESH	1	1	1	1	1	1	1		1	2	10	2	2	2	1		1	8	18
BOTSWANA											0						1	1	1
ETHIOPIA			1	1	2	1	1	2		1	9			1	1	1	1	4	13
GUINEE BISSAU			1						1		2							0	2
MOZAMBIQUE		1	1		1	2				2	7	2	2					4	11
NAMIBIA	1					2	1				4			1	1	1		3	7
SOUTH AFRICA											0	1			1			2	2
SRI LANKA	1	1	2	1							5	1		2		2	2	7	12
ZAMBIA			1			1					2	2		1	1	1		5	7
ANGOLA										1	1		1	1		1		3	4
CAMBODIA											0	1	1				2	4	4
ERITREA											0				1	2	1	4	4
KENYA	1		1	1		1	1				5	1	1	1	1	1		5	10
LAO						2					2	1		1				2	4
NICARAGUA				1		1					2							0	2
PALESTINE										1	1						1	1	2
UGANDA		1						1	1	1	4	1			1		1	3	7
VIET NAM									1		1		1	1	1		1	4	5
TOTAL	8	9	12	10	7	10	7	5	6	11	85	15	10	13	8	12	11	69	154
OTHER NON SIDA	32	33	32	41	36	37	31	28	38	39	347	27	29	27	26	22	28	159	506
TOTAL TRAINEE	40	42	44	51	43	47	38	33	44	49	432	42	39	40	34	34	39	228	660

Annual Training Programme of IIEP in Planning and Administration of Education
Number of Trainees by UNESCO regions from 1965/66 to 1995/96

Evaluation of Sida support to IIEP (October 1996)

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Appendix 13 Cumulative list of ATP students by country of origin

AFRICA	ARAB STATES	ASIA & THE PACIFIC	LATIN AMERICA & CARIBBEAN	EUROPE AND NORTH AMERICA
1. Angola 4	1. Algeria 19	1. Afghanistan 9	1. Antigua 1	1. Albania 2
2. Benin 17	2. Bahrain 6	2. Australia 3	2. Argentina 9	2. Austria 2
3. Botswana 1	3. Egypt 10	3. Bangladesh 24	3. Barbados 4	3. Belgium 6
4. Burkina Faso 16	4. Iraq 5	4. Bhutan 2	4. Belize 1	4. Bulgaria 3
5. Burundi 14	5. Jordan 2	5. Cambodia 8	5. Bolivia 4	5. Canada 2
6. Cameroon 15	6. Kuwait 2	6. China 18	6. Brazil 32	6. Cyprus 3
7. Cape Verde 4	7. Lebanon 11	7. Fiji 1	7. Chile 9	7. Estonia 1
8. Central Africa Rep. 10	8. Morocco 11	8. India 25	8. Colombia 20	8. Finland 4
9. Chad 8	9. Oman 6	9. Indonesia 29	9. Costa Rica 5	9. France 17
10. Comoros 1	10. Palestine 2	10. Iran 11	10. Cuba 1	10. Germany 1
11. Congo 13	11. Saudi Arabia 2	11. Japan 4	11. Dominican Rep. 2	11. Greece 3
12. Cote d'Ivoire 9	12. Sudan 18	12. Kazakhstan 2	12. Ecuador 3	12. Hungary 1
13. Djibouti 2	13. Tunisia 12	13. Korea DPR 3	13. El Salvador 2	13. Ireland 1
14. Equatorial Guinea 4	14. Yemen 9	14. Korea R 15	14. Guatemala 4	14. Italy 3
15. Eritrea 4	15. Kyrgyzstan 2	15. Laos PDR 4	15. Guyana 5	15. Latvia 3
16. Ethiopia 18	16. Lao PDR 4	17. Malaysia 6	16. Haiti 11	16. Lithuania 2
17. Gabon 5	17. Maldives 2	18. Maldives 2	17. Honduras 1	17. Malta 4
18. Gambia 4	18. Mongolia 2	19. Myanmar 1	18. Jamaica 1	18. Netherlands 1
19. Ghana 19	20. Nepal 3	21. Nepal 3	19. Mexico 14	19. Poland 1
20. Guinea 13	21. Pakistan 28	22. Papua N. Guinea 2	20. Netherland Antilles 1	20. Portugal 5
21. Guinea-Bissau 3	22. Papua N. Guinea 2	23. Philippines 7	21. Nicaragua 2	21. Romania 1
22. Kenya 17	23. Pakistan 28	24. Philippines 7	22. Panama 2	22. Russia 1
23. Lesotho 2	24. Samoa 3	25. Singapore 1	23. Paraguay 1	23. Spain 7
24. Madagascar 13	25. Sri Lanka 19	26. Sri Lanka 19	24. Peru 11	24. Switzerland 3
25. Malawi 5	26. Thailand 21	27. Thailand 21	25. Saint Lucia 2	25. Turkey 9
26. Mali 14	29. Turkmenistan 2	30. Vanuatu 1	26. Surinam 4	26. UK 3
27. Mauritania 11	31. Viet Nam 10		27. Trinidad/Tobago 1	27. U.S.A. 4
28. Mauritius 3			28. Uruguay 2	28. Yugoslavia 1
29. Mozambique 12			29. Venezuela 18	
30. Namibia 7				
31. Niger 9				
32. Nigeria 45				
33. Rwanda 17				
34. Sao Tome & P. 1				
35. Senegal 14				
36. Seychelles 2				
37. Sierra Leone 4				
38. Somalia 2				
39. South Africa 2				
40. Swaziland 5				

Total : Africa: 465
Arab States: 115
Asia & the Pacific : 268
Latin America & Caribbean : 173
Europe & North America : 94

1,115 Trainees from 148 countries

Appendix 14Sources of Financing for ATP trainees

Source	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96
UNESCO Participation Programme	Equatorial Guinea Suriname	Western Samoa Zambia	Bangladesh	Cape Verde Nigeria Sudan	Burundi Nigeria	Mauritania Nigeria Sudan Swaziland Togo Turkmenistan Zaire Zambia	Benin Botswana Ivory Coast Gabon Guinea Zaire Bolivia Kazakhstan Kyrgyz Rp Mongolia Turkmenistan Vietnam Latvia Rumania Yemen
UNESCO Regular Programme	India Morocco Turkey			Colombia			
UNESCO Funds in Trust	Burkina Faso Gambia Madagascar Senegal (2)	Burkina Faso Madagascar (2) Uganda Senegal					
UNESCO Redeployment						Zimbabwe Haiti	
UNESCO Fellowship Trust						Cameroon Eritrea (2) India Morocco	

UNDP	Bangladesh Ghana (2) Indonesia (2) Lebanon (2) Mali Mozambique Nigeria Rwanda Zaire Yemen Palestine	Algeria (2) Ghana(2) Mozambique (2) Nigeria Pakistan (2)	Algeria China Ghana Mozambique (2) Nigeria	Ghana Kenya Korea PDR Pakistan	Eritrea Kyrgyzstan		Chad Seychelles Cambodia (2)
UNICEF		Turkey					
World Bank	Angola Guinea (2) Haiti Ethiopia Mauritania Mozambique Zaire	Cambodia Haiti Kenya Lao PDR Malaysia	Angola Oman Togo	Angola Madagascar (2) Mauritania Lao PDR Malaysia	Ethiopia Kenya Madagascar (2) Sri Lanka Mali Mauritania	Angola Belize Burkina Faso Mali Chad Sri Lanka (2)	Burkina Faso CAR Papua New Guinea Sri Lanka (2)
EEC/EU	Ivory Coast						Nigeria (2)
Development Banks	Phillipines	Colombia		Gabon			
France	Pakistan	Chile (2) Equatorial Guinea Haiti	Greece Vanuatu	Burundi France	Ivory Coast (joint)	Fiji India Morocco	Gambia
Sweden (Sida)	Bangladesh Zimbabwe	Bangladesh Sri Lanka Tanzania Zimbabwe Zambia	Bangladesh (2) Tanzania Zimbabwe	Namibia Bangladesh (2) Sri Lanka (2)	Estonia Latvia Lithuania Namibia Bangladesh	Namibia	
DSE (Germany)	Cameroun Swaziland Zimbabwe	Cameroun Mauritius Rwanda	Benin Cameroun CAR Guinea Rp Kenya Malawi Mali Mauritius Chad	Benin Cameroun Ivory Coast Ethiopia Ghana Niger Togo Zambia Mongolia Albania	Burkina Faso Guinea Rp Niger Tanzania Chad Zambia		

Germany (Funds in Trust)							Sierre Leone Kazakh- stan
Austria		Bhutan Burundi Rwanda	Burkina Faso Swaziland Vietnam	Burkina Faso Costa Rica Vistnam	Rwanda Uganda Vietnam Albania	Ethiopia Guinea Rp Kenya Lithuania	Cape Verde Ethiopia Uganda
Italy (Funds in Trust)							Palestine
Britain (ODA)							Bangla- desh
USA (USAID)				Mali			Mali (? PDEB/ USAID)
NORAD/ UNICEF							Eritrea
Own Government	Bahrain Korea Rep Malta Niger Brazil Venezuela	China Mexico (2)	Bahrain Brazil Iran Slovenia Venezuela	China Zimbabwe Venezuela	China Argentina (2) Russia	Zimbabwe China Barbados Latvia Brazil	Argentina (2) Japan
Private Foundn.	Uganda		South Africa		South Africa		
ACCT (???)			Equatorial Guinea				
IDRC (?Canada?)				Mali			
Alliance Francaise			Cambodia				
FGMda, Venezuela					Venezuela		
University					Mexico		
Trainees Personal Funds	Italy	India	Germany Paraguay Spain				
Total trainees	48	42	39	40	34	35	39

Appendix 15

Workplace of trainees before attending ATP

	Training & Research Institutes		Ministries of Education, etc.		Other		
Year	Number	%	Number	%	Number	%	Total
1989/90	14	29	32	65	3	6	49
1990/91	4	10	37	88	1	2	42
1991/92	11	28	26	67	2	5	39
1992/93	7	17	34	83	0	0	41
1993/94	9	26	25	74	0	0	34
1994/95	7	20	27	77	1	3	35
1995/96	7	18	30	77	2	5	39
Total	59	21	211	76	9	3	279

'Training and Research Institutes' include universities as well as institutions which are part of ministries of education.

'Ministries of Education, etc.' include a few coming from Planning Ministries, etc., totalling no more than 2½% of this categories.

'Other' include local local and international NGOs and other unclassifiable workplaces of trainees.

Appendix 16 Co-operation agreements

List of Institutions having entered a partnership agreement with IIEP

- INNOTECH, Southeast Asian Ministers of Education Organization , Manila, Philippines.
- University of Zimbabwe Department of Educational Administration, Harare, Zimbabwe.
- Korean Educational Development Institute, Seoul, Republic of Korea.
- University of Rio de Janeiro, Faculty of Education, Rio de Janeiro, Brazil.
- National Institute of Educational Planning and Administration, New Delhi, India.
- Institute of Madagascar for Techniques of Planning, Antananarivo, Madagascar.
- Centre d'Orientation et de Planification de l'Education, Rabat, Morocco.
- Universidad Superior Pedagógico, Maputo, Mozambique.
- China Central Institute for Educational Research, Beijing, China.
- University of Costa Rica, San José, Costa Rica.
- Hungarian Institute for Educational Research, Budapest, Hungary.
- The University of the South Pacific, Suva, Fiji.
- Institut Aminuddin Baki, Genting, Malaysia.
- Institute for Engineering and Management, St. Petersburg, Russian Federation.

In preparation:

- Universidad Pedagógica Experimental Libertador, Caracas, Venezuela.
- The University of World Economy and Diplomacy, Tashkent, Republic of Uzbekistan

Members Institutions of the Asian Network of Training and Research Institutions in Educational Planning

- National Academy for Educational Management, Dhaka, Bangladesh
- Shanghai Institute of Human Resource Development, Shanghai, China
- National Council of Educational Research and Training, New Delhi, India
- National Institute of Educational Planning and Administration, New Delhi, India
- State Institute of Educational Management and Training, Uttar Pradesh, India
- Balitbang Dikbud Centre for Policy Research, Jakarta, Indonesia
- Korean Educational Development Institute, Seoul, Korea
- Research Centre for Educational Innovation and Development, Kahtmandu, Nepal
- Academy of Educational Planning and Management, Islamabad, Pakistan
- National Institute of Education, Maharagama, Sri Lanka
- Campaign for Popular Education, Dhaka, Bangladesh
- International Institute for Educational Planning, Paris, France

Member countries of the Southern African Consortium for the Measurement of Educational Quality (ministries of education)

Kenya, Malawi, Mauritius, Tanzania (mainland), Tanzania (Zanzibar), Zambia and Zimbabwe

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Appendix 18 Annual Accounts 1990-1995 + 1996 (estimate) (abbreviated)

IIEP Income, 1989-1996

	1989 Actual US\$	1990 Actual US\$	1991 Actual US\$	1992 Actual US\$	1993 Actual US\$	1994 Actual US\$	1995 Actual US\$	1996 Estimate US\$
Resources Inside of IIEP Account								
UNESCO Grant	1,568,265	2,304,969	2,314,011	2,641,881	2,169,229	2,949,076	3,353,974	3,390,000
Voluntary donations								
Canada	103,448		112,026					
Denmark	92,949	167,983	168,129	187,362	204,021	215,223	287,370	287,658
Finland	159,817	247,431	409,525					
Iceland		4,459	5,653	7,143	3,622	3,547	3,930	3,930
India		20,112		20,392	19,048	9,615	9,616	9,500
Ireland	16,410	19,192	20,919	19,345	17,979	18,223	19,509	17,600
Mexico		3,000						
Norway	277,778	387,597	418,886	385,179	364,649	368,727	411,606	1,064,132
Sweden	471,533	689,484	724,895	796,002	694,323	536,677	494,192	756,000
Switzerland	151,515	255,906	222,758	238,640	224,310	225,816	280,385	312,378
UK			19,252					
Venezuela			30,000					
Total voluntary donations	1,273,450	1,795,164	2,102,043	1,684,063	1,527,952	1,377,828	1,506,608	2,451,198
Total vol. + UNESCO	2,841,715	4,100,133	4,416,054	4,325,944	3,697,181	4,326,904	4,860,582	5,841,198
Miscellaneous	155,979	149,678	452,992	175,450	393,167	604,927	830,058	360,000
Total Income	2,997,694	4,249,811	4,869,046	4,501,394	4,090,348	4,931,831	5,690,640	6,201,198
Contracts								
Sida		19,170	18,137	35,337	16,692	1,539		
Total Contracts	67,460	32,560	366,975	170,570	594,573	442,239	600,329	348,885
Supplementary Income			90,000	237,000	491,480			
Total cash income	3,065,154	4,282,371	5,326,021	4,908,964	5,176,401	5,374,070	6,290,969	6,550,083
Other Resources	997,777	1,008,189	650,908	938,513	533,134	958,498	420,274	408,923
Total Resources inside of IIEP	4,062,931	5,290,560	5,976,929	5,847,477	5,709,535	6,332,568	6,711,243	6,959,006
Resources Outside of IIEP Account								
Physical Resources		1,243,100	858,300	877,000	853,000	880,000	900,000	1,330,000
Human Resources		106,900	160,300	130,000	126,000		65,000	65,000
Training & Research		807,200	927,000	1,535,000	1,363,076	2,398,014	2,616,849	2,819,800
Total Resources Outside of IIEP		2,157,200	1,945,600	2,542,000	2,342,076	3,278,014	3,581,849	4,214,800
Total of all resources*		7,447,760	7,922,529	8,389,477	8,051,611	9,610,582	10,293,092	11,173,806

IIEP contracts, 1989-1996

	1989 Actual US\$	1990 Actual US\$	1991 Actual US\$	1992 Actual US\$	1993 Actual US\$	1994 Actual US\$	1995 Actual US\$	1996 Estimate US\$	Total, 1990-95 US\$
Brunei							19,167	22,000	19,167
EDUPLUS of Canada							0	25,000	0
Finland							0	22,990	0
France (Foreign Affairs)						214,206	111,890	19,538	326,096
DSE (Germany)		48,035		4,392	39,508	23,509	23,983	119,474	139,427
GTZ (Germany)		48,571			11,574		0	6,398	60,145
Inter-American Dev Bank							9,910	0	9,910
Malaysia							38,000	0	38,000
Mauritius							59,312	0	116,912
Network Educ. Science Amsterdam (NES-A)					171,600	-114,000		56,800	33,352
UNESCO					33,352		0	30,000	420,611
UNICEF	40,000		140,000			200,000	80,611	0	512,798
Assoc. for a Univ. for Peace				27,045	285,753		200,000	0	0
USAID			10,620			18,680	57,456	0	86,756
World Bank							0	6,608	0
IDRC special (Can)	17,094	3,152	10,870			2,387			31,294
SIDA (Sweden)		8,632	18,137	35,337	16,692	1,539			80,337
Swiss Foreign Affairs	10,366	16,733							16,733
Swiss DDA				15,346	3,103				18,449
Brazil			8,800			45,457			54,257
Asian Development Bank			20,438	9,415					29,853
British Council			6,640	6,958					13,598
CIDA (Canada)			11,327	22,684					34,011
Chad contracts			40,337						40,337
Spain			3,200						3,200
Australia				3,789	6,312				10,101
Commonwealth Secretariat				44,104	3,084				47,188
UNDP				1,500					1,500
France (co-operation)					1,146				1,146
New Zealand					5,398				5,398
NORAD (Norway)					2,166				2,166
Mexico Co-operation programme						20,610			20,610
ODA (UK)						29,851			29,851
Total contracts	67,460	28,517	366,975	170,570	594,573	442,239	600,329	348,885	2,203,203

NB Because of an overpayment of US\$114,000 by Mauritius in 1993, repayed in 1994, the totals for these two years are distorted in opposite directions by this amount.

IIEP Expenditure 1989 to 1996

	1989 Actual US\$	1990 Actual US\$	1991 Actual US\$	1992 Actual US\$	1993 Actual US\$	1994 Actual US\$	1995 Actual US\$	1996 Estimate US\$
Expenditure inside IIEP account								
<u>Observation</u>								257,000
<u>Training</u>								
ATP	718,121	839,362						
Training of Trainers	112,650	169,654						
ITCs	183,933	196,450						
Research workshops	104,004	217,979						
Seminars	18,890	21,903						
Research Fellow programme	144,614	115,388						
Visiting Fellow programme	21,000	36,068						
Studies on training	0	138,572						
Other	15,315	50,306						
<u>Training Total</u>	1,318,527	1,785,682	2,226,149	2,060,830	1,938,292	2,132,682	2,275,753	1,800,000
<u>Research</u>	564,911	698,841	801,806	1,119,670	862,461	1,017,530	1,176,602	1,450,000
<u>Documentation Centre</u>	197,774	257,829	286,860	300,000	263,145	367,228	352,245	
<u>External co-operation</u>	73,761	140,852	124,422	120,000	97,545	112,711	141,911	133,000
<u>Dissemination</u>	542,137	815,767	871,929	909,500	805,482	1,170,469	1,119,003	1,325,000
<u>Operational Activities</u>								385,000
<u>Total programme</u>	2,697,110	3,698,971	4,311,166	4,510,000	3,966,925	4,800,620	5,065,514	5,350,000
<u>Governing Board</u>	149,689	134,450	194,818	155,200	202,154	176,199	214,301	150,000
<u>General Administration</u>	577,400	807,804	803,656	840,502	878,512	1,006,451	1,157,505	1,050,000
<u>Total administration</u>	727,089	942,254	998,474	995,702	1,080,666	1,182,650	1,371,806	1,200,000
<u>Grand Total</u>	3,424,199	4,641,225	5,309,640	5,505,702	5,047,591	5,983,270	6,437,320	6,550,000
Over/Under spend	(359,044)	(358,854)	16,381	6,660	128,810	(609,200)	(146,351)	

Appendix 19 Some publications consultedFrom IIEP (UNESCO) Paris:

IIEP Basic Texts (July 1995 edition)

IIEP Medium-Term Plan, 1984-1989 (1984)

Fifth Medium-Term Plan (1990-1995) (June 1989)

Medium-Term Plan, 1996-2001(July 1995)

IIEP Report of Activities in 1990; ... in 1991; ... in 1992; ... 1993; ... 1994; ... 1995.

Welcome to IIEP - Annual Training Programme in Educational Planning and Administration, XXXIst Session, 1995/96

Short-term training at the IIEP - Programme for visiting trainees (July 1995)

Annual Training Programme in Educational Planning and Administration, 1989/90 - Objectives, Structure and Contents

Annual Training Programme in Educational Planning and Administration, XXXIst Session, 1995/96, Course Resume

TABAS, Trainees' Association Bulletin, 1989/1990

TABAS International, Trainees' Association Bulletin 1990/1991; ... 1991/1992; ... 1992-1993; ...1993-1994; ...1994-1995

IIEP Newsletter Vol. VIII No. 1, January-March 1990 to Vol. XIV No. 3, July-September 1996

Catalogue of Publications and Documents 1996 (August 1996)

The training of trainers in educational planning. Report of an IIEP workshop, Nairobi, Kenya 29 June - 10 July 1987 (in co-operation with the Ministry of Education, Kenya)

Strengthening national training capacities in educational planning and administration. Report of an IIEP Seminar, Paris, 10-14 December 1990, Jacques Hallak and Michaela Martin

Indicators of the quality of education: a summary of a national study of primary schools in Zimbabwe. IIEP Research Report No. 96, Kenneth N. Ross & T. Neville Postlethwaite (June 1992)

Many other IIEP documents were also consulted and briefly reviewed in the course of the evaluation.

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