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EVALUATION

Midterm Performance Evaluation of the USAID/Jamaica Basic Education Project

February 2013

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Cover photo: Students and teacher at Padmore Primary School, taken by Janet Orr.

MIDTERM PERFORMANCE EVALUATION OF THE USAID/JAMAICA BASIC EDUCATION PROJECT:

IN SUPPORT OF THE JAMAICA EDUCATION TRANSFORMATION PROJECT

February 15, 2013

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ACRONYMS

ASTEP	Alternative secondary transitional education program
AO	Assistance objective
CBSI	Caribbean Basin Security Initiative
COR	Contracting officer's representative
DRTA	Directed reading thinking activities
ETP	Education Transformation Program
EO	Education officer
EEH	Expanding Educational Horizons
ERAI	Early reading assessment instrument
EGMA	Early grades mathematics assessment
EGRA	Early grades reading assessment
G4LT	Grade 4 literacy test
GOJ	Government of Jamaica
GSAT	Grade-six achievement test
IR	Intermediate result
KWL	Know, want to know, learn
JETP	Jamaica Education Transformation project
JTA	Jamaica Teachers Association
JTC	Jamaica Teaching Council
MOU	Memorandum of understanding
MOE	Ministry of Education
NEI	National Education Inspectorate
NHP	New Horizons for Primary Schools
NRP	National Reading Panel
PATH	Program of advancement through health and education
QAR	Question answer response
QEC	Quality education circles
SIP	School improvement plan
SOW	Statement of work
USAID	United States Agency for International Development
USG	United States Government

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I. EXECUTIVE SUMMARY

EVALUATION PURPOSE AND EVALUATION QUESTIONS

The purpose of this performance evaluation of the United States Agency for International Development in Jamaica's (USAID/Jamaica) Jamaica Education Transformation Project (JETP; "project") is to assess the progress of the project from its start in January 2010 through the end of the school year in 2012; to make recommendations for any necessary modifications through the life of the project; and to review the validity of data collected thus far. The evaluation report is also intended to provide suggestions and recommendations for inclusion in the next education strategy for USAID/Jamaica.

The original evaluation questions, as proposed by USAID/Jamaica are listed in the main body of this report, but can be summarized as follows:

- To what degree are teachers, principals and regional Ministry of Education (MOE) offices implementing and supporting the project?
- Does the Jamaican education system have the capacity to implement and monitor the project?
- Is there a difference in student reading performance between project schools in crime-prone communities that received additional material support—and those that were not?
- What were the challenges faced with baseline data collection, have they been resolved, and if not, how can they be?

THE DEVELOPMENT PROBLEM

Jamaica's Ministry of Education has taken important measures to build and transform its education system. Although the country has achieved near-universal primary and secondary education enrolment, its schools still face challenges of poor quality of instruction, inadequate teacher training and retention, underperformance, gender imbalances, lack of physical and human resources, and the influence of crime and violence.

Persistent illiteracy plagues the nation, particularly in low-income communities. Since testing began in the 2008-09 school year, on average only 71 percent of Grade 4 students have been certified as literate. As a result, there is an increased emphasis on improving education outcomes by improving children's ability to read. The United States Government's (USG) Jamaica country assistance strategy priority supports this goal by contributing to improved early grade reading instruction and reading delivery systems and greater engagement, accountability, and transparency by the educational system.

PROJECT DESCRIPTION AND EVOLUTION

As originally conceived, the project aimed to improve student performance in reading and mathematics in grades 1-3; to strengthen accountability in the primary education system through use of measurement tools and establishment of standards; and to build regional capacity for school management oversight.

From early 2010 through spring of 2012, the project was implemented in 250 schools throughout all six MOE regions. Among the schools originally targeted for project intervention were 54 schools in crime-prone communities, which received additional resources through the Caribbean Basin Security Initiative (CBSI), including books and computers. In contrast to previous USAID-funded projects since 1998, the current project did not have a direct presence in the schools themselves. Rather, a memorandum of understanding (MOU) between the project and the MOE, as well as terms of reference (TOR) between

the project and the Jamaica Teaching Council (JTC), devolved much of the responsibility for teacher training to the JTC, and the responsibility for the monitoring of school-based project implementation to the MOE. Underlying this model—and in line with the current USAID Forward objective of building the capacity of countries to lead their own development—was the logic that the MOE and its associated agencies would be in a position to assume progressively more responsibility for project implementation.

In accordance with the project design, project staff collaborated with JTC to train a small group of trainers, made up of retired teachers and other educational specialists. These trainers then trained principals and “resource teachers” in workshops facilitated by regional education officers. Resource teachers then returned to their home schools and trained their colleagues (referred to in this evaluation as “non-resource teachers”), so that all the teachers in the 250 project schools could implement the project-promoted teaching techniques in their classrooms. This model of training, known as the “cascade model,” is intended to build the capacity of the education system at all levels, while also reaching a large number of teachers with a relatively small number of direct, project-run trainings.

EVALUATION DESIGN, METHODS AND LIMITATIONS

The evaluation employed a combination of quantitative and qualitative techniques including classroom observations, key informant interviews, group interviews, and analysis of secondary data and documents. The evaluation approach was based on combining data from classroom observations and interviews with resource teachers trained by the project staff, the classroom teachers they trained, principals, and education officers in the regional and central offices.

Data from all 250 schools in the first cohort of schools were analyzed to determine whether there are differences in grade-two reading performance, as measured by the Early Reading Assessment Instrument (ERA), between project schools in high-crime areas that have been given additional CBSI resource materials and similar project schools that have not.

At the school level, evaluators focused on the results of training that principals and resource teachers received from project staff, and on the results of in-service activities for other teachers conducted by principals and resource teachers in a representative sample of 12 schools throughout the country. From these schools, four were randomly selected as case study sites, where additional interviews and observations were conducted.

Because in most of the schools visited, resource teachers trained by the project were not teaching grades 1-3, evaluators were able to observe a very limited number of them in the classroom. This limitation was compensated in part through interviews with a larger number of resource teachers working at other grade levels, and through observations of other classroom teachers. Still, this small sample size of resource teachers included in the evaluation and the limited number of schools visited during the field work period diminish the representativeness of the sample of informants and represent a key limitation to the evaluation methodology.

KEY FINDINGS

At the national and regional levels

According to the MOU between the project and the MOE, the MOE, through its regional education offices, has the responsibility for monitoring implementation of the project at the school and classroom level. However, the MOU does not provide guidance about how education officers should conduct this monitoring. They did not receive sufficient training, tools, or time to effectively monitor project implementation, and as a result, that link in the feedback loop, from the schools to the MOE and the project, broke down.

At the school level

Principals and resource teachers overwhelmingly support the project, believe in its value, and take actions to implement the content of the trainings in their schools and classrooms. Principals are assessing the needs of their students and targeting learning initiatives in those areas. Many of them also support the activities of the resource teachers in their schools by granting resource teachers the authority and time to carry out project activities such as in-school trainings and classroom observations, making time available to all teachers to attend the trainings, providing necessary space and materials for project activities, and generally communicating the importance of the project to their staff. Resource teachers, for their part, were more successful when they received this kind of support from the principals, when they received continuing support from regional education officers, and when they themselves felt a personal and professional commitment to the project goals. When this support from principals and the regional MOE was missing, they were generally less successful at fulfilling their role as the middle link in the cascade model. Whether resource teachers were effective in the schools also hinges upon which teachers are selected for this role, especially their particular teaching assignment within the school, as well as issues of turnover and absenteeism.

At the classroom level

Based on interviews and classroom observations, resource teachers do, in general, utilize the project-promoted teaching strategies in their classrooms, especially those that attended the full complement of trainings. Utilization of these techniques by non-resource teachers was less consistent. Many expressed the concern that resource teachers were not able to effectively and comprehensively convey the content of the training during their in-school trainings. As a result, non-resource teachers did not always feel confident attempting to incorporate what they learned into their lessons. Other factors which influenced the decisions of both resource and non-resource teachers to use these new teaching methods included: availability of project materials, such as books and manipulatives, support from principals and education officers, fit with student needs, and their own knowledge base and commitment to literacy instruction and the project itself.

Challenges to the 2010 baseline data collection and their remedies in 2011

The 2010 baseline data collection faced a number of challenges, many of which were remedied during the subsequent round of data collection after the first year of the program. First, the project relied on teachers to administer the tests to their own students, opening the door for irregularities in the testing procedures in part caused by pressure on the teachers to present their students and their schools in the most positive light. An examination of the 2010 data supports the hypothesis that these results are not an accurate measure of actual student ability, showing a disproportionately large number of high scores, throwing off the expected bell curve and raising the overall average score. In 2011, the project hired external examiners to administer the tests in the schools, expanded the size of the sample, and added a number of control schools. These steps helped to minimize the risk of deviation from the student selection methods and other testing procedures, producing an accurate, reliable measure of student reading performance in project schools in 2011.

Comparison between student performance in CBSI and non-CBSI schools

Based on the analysis of student performance on the ERAI administered in 2010, there was a statistically significant difference between the average scores of those students in schools which received additional educational materials through the CBSI program and those which had not received these materials. Students in non-CBSI schools scored, on average, 0.4 points, or about half a grade level, above their CBSI counterparts, for an effect size of about 10 percent. According to the 2011 data, however, no statistically significant difference was observed, and given the improvements to the sampling methodology and testing procedures in 2011, this finding of no difference is more credible.

CONCLUSIONS

Principals and resource teachers appreciated and successfully implemented the new techniques learned through the project training

The cascade model relies upon project-trained trainers to train these resource teachers and principals in new school management and teaching techniques, and based on the data collected through this evaluation, this part of the project has overall been successful over the past two years.

The cascade training model broke down at the school level, as resource teachers did not consistently convey project-promoted strategies to their colleagues.

Principals have not consistently provided resource teachers with the institutional support they need in order to conduct project activities in the schools. Resource teachers have not always been able or willing to reliably reproduce the high-quality trainings they received, reducing the knowledge transfer and the buy-in on the part of the non-resource teachers. In short, the project's expectation that these skills and practices would trickle down to the classroom level was not fulfilled to the degree that it expected.

The Jamaican education system is not robust enough at the regional level to fulfill the project monitoring role assigned to it by the project MOU without greater support from JETP.

The MOU between the JETP and the MOE assigns responsibility for monitoring of project implementation to the regional education officers. However, they were not provided with the necessary training, tools, or time to effectively carry out this monitoring function. This breakdown demonstrates a failure in communication within the MOE, as well as an overall shortfall in the capacity necessary to fulfill this important role, diminishing the effectiveness of the program. This finding underlines the importance of thoughtfully structuring partnerships among USAID and its local and international implementing partners as they move forward with the USAID Forward initiative.

Using external enumerators improved the accuracy and reliability of the data collected in 2011 versus the data collected in 2010, resulting in an accurate representation of student performance in project schools.

Relying on teachers to collect the data on their own students during the 2010 baseline data collection raised the risk of irregularities in student selection and testing procedures, likely introducing bias into the sample. By switching to external enumerators hired by the project and increasing the overall sample size for the 2011 data collection, most of these risks have been minimized, and the resulting data set provides a more accurate representation of student performance in project schools.

There is no statistically significant difference in overall Grade 2 student performance between CBSI and non-CBSI schools based on the 2011 ERAI data.

Even though the CBSI schools were selected based on their location in crime-prone communities, one year into project implementation, there is no meaningful difference in average student performance between the two groups.

RECOMMENDATIONS

Priority recommendations

The priority recommendation is that the project, with support from USAID, better define and operationalize the monitoring role among key partners, namely the MOE regions, the JTC, and project regional staff liaisons. As part of this effort,

MOE regional directors should:

- Increase the awareness of regional education officers about the project, its design, content, and expected outcomes.
- Emphasize the expected role of education officers in contributing to school improvement and raising student achievement.
- Clearly articulate the role of education officers in the monitoring of the project
- Ensure that education officers have sufficient resources, especially including time, to carry out their intended role within the project.
- Clearly identify point-persons to oversee projects and to act as the liaison between these projects and the regional education offices.

The project staff, in consultation with JTC and the MOE should:

- Develop concrete tools, including monitoring and observation instruments, as well as associated training to allow project staff, education officers, JTC coaches, or other appropriate school-based monitors to provide “real-time” feedback on key aspects of project implementation at the school level.
- Modify the project’s monitoring and evaluation plan to include appropriate sections reflecting school- and classroom-level feedback for quarterly reporting purposes.
- Provide training to the project’s regional advisors in monitoring and reporting on implementation findings at the school level.

Regional education offices were established to promote the effective management of schools, but have yet to adequately fulfill this role. For that reason, USAID, and as appropriate, other organs of the US government (State Department’s CBSI and Public Affairs efforts), should:

- Promote greater devolution of authority within the regional education system to give regional education officers a greater role in developing and implementing school improvement plans.
- Advocate for increasing the pace of the Education Transformation Program at the regional level, by specifically encouraging the MOE to establish and entrench an accountability framework with standards, regulations, consequences, and rewards.
- Promote the passage of enabling legislation that would further support these objectives.

USAID should:

- Support a return to good practices noted in previous projects, particularly those which foster greater direct involvement at the school and classroom levels for project staff. Project activities should include regular school visits, classroom observations, and regular feedback for teachers and administrators on implementation of project strategies.

II. INTRODUCTION

EVALUATION PURPOSE

The purpose of the performance evaluation of the USAID/Jamaica Basic Education Project is to assess the progress of the project since it commenced in January 2010, to make recommendations for any modifications to the present education project activities and implementation of these for the duration for the life of the project, and to review the validity of data collected thus far. The evaluation report is also intended to provide suggestions and recommendations for inclusion in the next education strategy for USAID/Jamaica. This evaluation focuses on the 250 schools participating in the project from 2010 through to spring 2012, and specifically on the literacy component. USAID allotted \$202,866.86 in funding for this evaluation, which was conducted from October 2012 to February 2013, with the field work taking place in November 2012.

EVALUATION QUESTIONS

The evaluation questions are listed in descending priority order, as indicated in USAID/Jamaica's scope of work for this evaluation:

- 1) To what degree are resource teachers implementing techniques learned through the JETP? What factors influence teachers' decisions to implement or not implement new teaching techniques?
- 2) A foundation of the JETP project was the assumption that there is a robust enough education system for USAID to work at the regional level, enabling results to trickle down to the classroom level. Is this assumption valid?
- 3) To what degree have professional development training impacted school management and instruction at the classroom level?
 - a. To what degree are the six Regional Offices supporting the implementation and monitoring the training received by teachers in the regions that they supervise? What factors contribute to success or pose challenges?
 - b. To what degree are principals creating the environment to support the teachers to receive and implement the training by project staff and their peers? What factors contribute to success or pose challenges?
- 4) Are there differences in reading test scores at the grade 2 level between JETP schools that have been given resource materials (books, computers, etc.) and similar JETP schools that have not?
- 5) The evaluator shall review the determination of the baseline and project Year 1 data and explain differences between these data. What were the challenges faced in determining the baseline data, and how were these resolved?
 - a. Is the most recent 'baseline' data an accurate representation of the true baseline?
 - b. If not, what steps need to be taken to establish an accurate baseline data set?

III. PROJECT BACKGROUND

THE CONTEXT: EDUCATION AND LITERACY IN JAMAICA

The Government of Jamaica (GOJ) has taken important measures to build and transform its education system. In the 1990-1991 school year, the Ministry of Education (MOE) reinstated a phased decentralization program with a regional office structure similar to the one that had existed in the mid-1970s but which had been suspended in 1985. In 2004, the Jamaica Task Force on Educational Reform reported on its comprehensive review of the national education system. Among other findings, the task force indicated that although some schools were “tackling their under-achievement challenges” and primary education projects such as the New Horizons project, funded by USAID, and the Primary Education Support Project, funded by Inter-American Development (IADB), provided support, there was no national program for remediation (Task Force, 2004: 96).

Key task force recommendations for literacy remediation were that students should be assessed for reading deficiencies; that approximately 400 remediation teacher specialists should be hired “on medium-term contracts throughout the regional authorities to be available to schools as needed”; expansion of a roving “master teacher corps” to provide mathematics and English instruction and teacher training in schools and in workshops; that literacy coordinators be appointed at schools using the New Horizons and Caribbean Center of Excellence for Teacher Training models;¹ and that teaching techniques such as “Drop Everything and Read” be re-instituted (pp. 97-98). The task force also recommended that education regulations be updated so that the regional education authorities would become “independent authorities” under the MOE, capable of hiring specialists, and that school boards would be accountable to the regional authorities (p. 162).

Although some of the task force’s recommendations have been implemented, and Jamaica has achieved near-universal primary and secondary education enrolment, many challenges remain. Systemic obstacles include poor quality of instruction, inadequate teacher training, problems related to staff retention and turnover, student underperformance, a large gender imbalance in literacy levels, a lack of physical and human resources at all levels of the system, and the negative influence of crime and violence in schools.

The USAID-funded Jamaica Educational Transformation Project was implemented at around the same period in which new entities such as the Jamaica Teaching Council² and the National Education Inspectorate (NEI) were being established. NEI, which evaluates the education system at all levels, completed its first round of inspections on thirty public schools at the primary and secondary levels in 2010. One of the key findings of the first Chief Inspector’s Report was that it is at the primary level that educational leadership is weakest, and that “leadership was weakest in those schools where the principal failed to demonstrate focused strategic and instructional leadership and did not hold staff accountable” (NEI, 2010:23).

Within the lower grades, between one-quarter and one-third of students do not achieve minimum literacy standards. For the 2010-2011 academic year, approximately 71.4 percent of the students achieved mastery on the Grade Four Literacy Test (G4LT), a figure that has remained relatively unchanged since the first administration of the test in the 2008-2009 academic year, when the figure stood at 71.7 percent. In all of the cohorts, girls strongly outperform boys, with 81.6 percent having

¹ For a review of this program, see Culver et al., 2006.

² As the executive arm of the Teachers' Service Commission, the JTC is charged with regulation, registration and licensing of members of the teaching profession.

achieved mastery compared to 61.5 percent for boys according to the most recent data.³ The Government of Jamaica has set as its goal the achievement of 100 percent literacy at the grade-four level by 2015. In 2009, the MOE introduced a competence-based transition policy to regulate the flow of children from the primary to the secondary level. The new MOE policy established in 2010 was that no child would be allowed to sit for the grade six achievement test (GSAT) unless the student could be certified literate and an increased emphasis was placed on improving education outcomes by improving student learning through children's ability to read.

Under the USG's current country assistance strategy for Jamaica, a priority goal is *Investing in People* by contributing to improved early grade reading instruction and reading delivery systems; increased acquisition of foundation mathematics skills in grades 1-3; and greater engagement, accountability, and transparency by the educational system as a whole. USG activities are also intended to support general education transformation in the country, as informed by the Jamaican government's national development plan, *Vision 2030*.

PROJECT DESCRIPTION

Within the context of the wider policy frameworks described above, USAID/Jamaica's Jamaica Education Transformation Project is intended to support the government of Jamaica's education transformation program. As originally designed, the project focused on improving primary school student performance in reading and mathematics, strengthening accountability in the primary education system through use of measurement tools and establishment of standards, and building regional capacity for school management oversight. Specifically, the project aimed to increase reading fluency in grades 1 through 3, to increase acquisition of foundation mathematics skills in grades 1 through 3, and improved capacity of the MOE, and newly created entities such as the NEI and the JTC, whose roles are briefly described in later sections.

The current project builds on two previous USAID-funded projects: the New Horizons for Primary Schools project (NHP, 1998-2005) and its most recent phase, called the Expanding Educational Horizons (EEH, 2005-2009) project. Similar to JETP, those earlier projects were managed by an implementing partner, the contracting firm Juarez and Associates, who reported to USAID/Jamaica. In addition to developing materials and conducting national and regional-level workshops, as is the case with the current project, the design of these earlier projects also included regular school visits, classroom observations, and feedback for teachers and administrators.⁴

A rigorous quantitative analysis of grade six test scores concluded that compared with schools not in the NHP program, schools participating in the NHP program showed higher performance in two of four components of the achievement measured Grade Six Achievement Test (GSAT), namely writing (communications task I) and mathematics (2006:13). A more recent, primarily qualitative evaluation of EEH stated that "EEH schools are now reportedly perceived as being of higher quality than other public schools" (Dye et al., 2008:19) and "in all respects, EEH's school development work was a major success"

³ G4LT data for 2010/11 from MOE, 2012, p. 121; for 2008/09 from MOE 2010, p. 111. UNESCO (2008a, 2008b) disaggregates data either for "youth," generally defined as person aged 15 to 24 years or older, or for "adults," generally defined as persons 15 years or older. Between the periods 1985 – 1994 and 2000 – 2006, the global adult literacy rate rose from 76 per cent to 83.6 per cent, with the largest increase occurring in developing countries – from 68 per cent to 79 percent. Source: UNESCO, 2008b, p. 23. According to UNESCO estimates, adult literacy rates in Jamaica averaged 80 percent between 1995 and 2005. Sources: UNESCO, cited from <http://www.unesco.org/ui/litbase/?menu=16&programme=42><http://www.unesco.org/ui/litbase/?menu=16&programme=42>

⁴ See, for example, the final evaluation of EEH by Dye et al. (2008:42).

(25). The EEH evaluation further concluded that the best way for USAID to obtain major returns from its investment in Jamaican primary school development would be to partner with the MOE on implementing selected components of the Education Transformation Program (ETP), an MOE project that had been originally supported by the World Bank.⁵ The evaluation identified the top two priority components of the ETP as: “Assisting the REAs [Regional Education Authorities] to effectively execute their new responsibilities for school improvement support and assisting the MOE in meeting its expanded policy formulation responsibilities” (29).

In line with one of the primary objectives of the “USAID Forward” initiative,⁶ namely building the capacity of countries to lead their own development, as well as with the recommendations of the EEH final evaluation, the request for proposal developed for the current project was based on the assumption that the MOE and its associated agencies would assume progressively more responsibility for project implementation. Along these lines, under the current project, a memorandum of understanding (MOU) between the project and the MOE and terms of reference (TOR) were developed with the JTC. These agreements outlined an approach that was substantially different from EEH and previous USAID-sponsored basic education projects in the country. Unlike those earlier projects, the design of the current project did not include regular visits or follow-up at the school level by project staff.⁷ Instead, the MOE and associated entities such as the JTC were now envisioned as co-project implementers, with JETP project staff providing curriculum and teacher training through a cascade model. Significantly, the current project no longer conducted teacher training or regular follow-up in project schools and classrooms.

Key activities of the current project include enhancing leadership skills for school administrators and classroom-level interventions such as establishing time for reading, providing training and supervision for teachers, assuring continuous assessment, and making appropriate reading materials available. The project also promotes the use of school management committees, mobilizing and engaging communities to address the reading issues of the school, strengthening community and education stakeholder access to and utilization of education data for local decision-making. The project also provides training on the use of information and communication technologies to support instruction in the early grades.⁸

Until recently, the project was implemented in 250 schools throughout all of the six MOE education regions. In addition to its focus on literacy and reading, the project also worked on providing training and tools to help students master mathematics concepts at the appropriate grade levels in grade 1 through 3, to better enable students to pass the grade 4 reading and mathematics examinations. The project also assisted in developing and introducing, for the first time in Jamaica, early grade mathematics and reading standards, as well as benchmarks that teachers can use in their classrooms (USAID/Jamaica Basic Education Standards, 2012).⁹

Among the 250 schools originally targeted for project intervention were 54 schools in crime-prone communities. These schools benefitted from additional resources under the Caribbean Basin Security

⁵ The World Bank project description is at <http://www.worldbank.org/projects/PI07407/jm-education-transformation-capacity-building?lang=en>

⁶ See for example, <http://www.usaid.gov/results-and-data/progress-data/usaid-forward>

⁷ This changed in fall 2012, when project-funded “coaches” began working in selected schools. Prior to that period (and importantly, in the time period covered by this evaluation) there was no project presence or follow-up in the schools.

⁸ Specific modules on these and other key training subjects are available, by request, by following the instructions provided at <http://www.jamaicaneducatorsshare.com>.

⁹ These were based in part on the research on Early Grades Reading Assessment (EGRA) and Early Grades Mathematics Assessment (EGMA), which were developed by RTI International, and have been adapted to and used in more than 50 countries and 70 languages since 2006. See, for example, Gove and Wetterberg (2011).

Initiative (CBSI) program, which is a partnership between the U.S. Government and Caribbean partners to develop a joint regional citizen safety strategy against security and criminal threats within the Caribbean (US State Department, CBSI, 2010, 2012). In addition to receiving project training and support for teachers, school administrators, and regional education staff, CBSI schools also received laptop computers, mathematics libraries, reading libraries, and other educational materials.

Ten trainers of principals, drawn from the project staff, conducted training with 192 principals and school administrators in the following areas:

- Leadership: management to support the reading program
- Leadership: management to support the mathematics program
- Student performance standards on the Early Reading Assessment Instrument as they inform leadership and instructional practice
- Use of student performance results on the Early Reading Assessment Instrument to inform instructional practice

The project also trains resource teachers, who are generally lower-grade (grades 1 through 3) teachers, and who are expected to return to their schools to train other lower grade teachers in a “cascade” model of training as exemplified in the following graphic (Figure 1) from the MOU between the project and MOE (Appendix II).

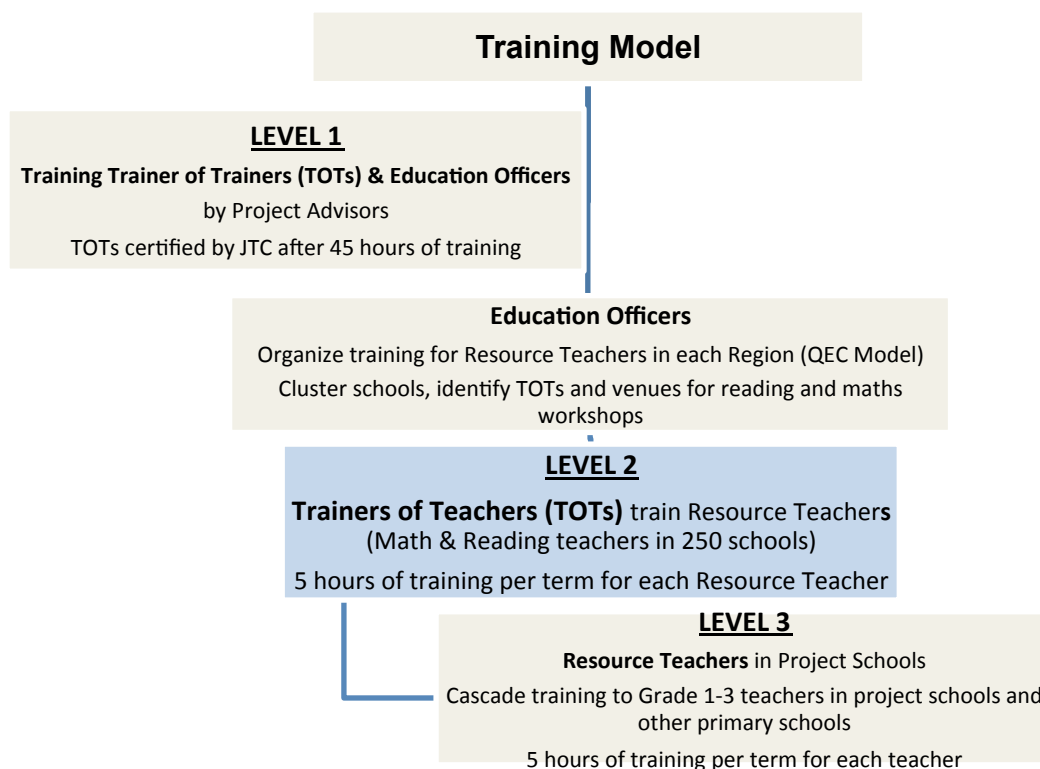


Figure 1: Project Resource Teacher Training Model

The project, adopting this cascade model, began training trainers of teachers in the areas of reading and mathematics improvement in collaboration with the JTC and the MOE's regional offices.¹⁰ Often, retired teachers were recruited to serve as trainers of teachers and deliver it to resource teachers from the 250 designated project schools. The trainers of teachers then went into the regions to train two early grade teachers at each school. The teachers trained by the trainers of teachers would serve as resource teachers in their schools, passing along the strategies and techniques learned through the project. Resource teachers were expected to be the most knowledgeable and experienced in their respective fields within the context of their schools, and so it was expected that they would attend a number of training sessions per year, in reading, mathematics, or information and communication technology, as appropriate. When this newly designated resource teacher returned to her school, she trained the other grade 1 through 3 teachers. Resource teachers received some training on how to train and how to follow up on and reinforce training. These teachers were also provided with copies of the training modules to facilitate their training of other classroom teachers. These materials contained strategies that illustrate different concepts and methodologies to support reading and mathematics instruction. Reading resource teachers were trained in the following strategies, many of which are described in greater detail in the section on findings:

- Reading standards and strategies for the effective teaching of reading
- Comprehension based on Bloom's and Barrett's taxonomies of higher order questioning strategies
- Lesson planning: activities for before, during and after reading
- The early reading assessment checklist (ERAC) as a tool for continuous assessment
- Know, want to know, learned (KWL)
- Directed reading thinking activity (DRTA)
- Directed listening thinking activity
- Question answer response (QAR)
- Explicit reading instruction: direct explanation, modeling, guided practice, and application

In 2012, there were several important changes to the project. First, to align itself more closely with USAID/Washington's strategic literacy objectives, the project no longer includes activities related to mathematics. Second, for the current academic year (2012-2013), the composition of project schools has changed considerably. Instead of having schools in all six educational regions, the project is now focused on three regions, namely Regions 1, 4, and 6. The number of schools was dropped from 250 to 172, and within the new group of schools, only 66 of these schools overlap with the earlier set of project schools.

¹⁰ The Jamaica Teaching Council is charged with hiring teacher trainers, and the MOE regional offices convene the training sessions.

IV. EVALUATION METHODS

A complete description of the methods used and the evaluation process is included as part of Appendix IV of this report. The evaluation employed a combination of quantitative and qualitative techniques including classroom observations, key informant interviews, group interviews, and analysis of secondary data and documents.

Six researchers conducted fieldwork, primarily during a two-week period between November 5 and 15, 2012. Additional follow-up interviews were conducted from mid-November through January 2013. The evaluation examines only the literacy component as it was implemented within the original cohort of 250 project schools.

School selection

Data from all 250 schools in the first cohort of schools (2010-12) were analyzed to determine whether there are differences in Grade 2 student reading performance, as measured by the ERAI, between project schools in high-crime areas that received additional resource materials through the CBSI and project schools that did not.

12 schools were initially selected from the total of 250 based on a stratified random sampling method. This original list was then modified due to logistical constraints and in order to achieve a more representative sample of all project schools in terms of region, school size, location (urban and rural), average student performance, and CBSI status. From the 12 sample schools, four schools were also selected as case study sites (Appendix VIII), where additional interviews and observations were conducted. The table below provides a list of the schools included in the evaluation:

Table 1: Schools included in the evaluation

School Name	Region	CBSI	Location	% Mastery on G4LT 2011	Case Study
Padmore Primary	1		Rural	29	Yes
Holy Family Primary and Infant	1	Yes	Urban	70	
Mount Angus Primary & Junior High	2		Rural	38	
Yallahs Primary	2	Yes	Urban	66	
Unity Primary	3		Rural	69	
Sudbury	4		Rural	70	
Lucea Primary	4	Yes	Urban	76	Yes
New Forest Primary and Junior	5		Rural	91	Yes
Hatfield Primary and Junior High	5	Yes	Urban	51	
St. Mary's All Age	6		Urban	54	
Effortville	6	Yes	Rural	61	Yes
Old Harbour Bay Primary	6	Yes	Urban	59	

Fieldwork

The evaluation team collected data at the school, regional and national levels as the basis for the analysis in this report.

At the school level, the focus of the individual and group interviews was twofold: (i) the effects of training in leadership and management on principals' ability to support the reading program, and (ii) the effects of training on teachers' implementation of strategies for teaching reading.

- 1089 students in 34 classrooms, grades 1 through 3 in the 12 sample schools;
- A total of 10 resource teachers participated in the evaluation (3 were observed in their classrooms and 7 participated in individual interviews)
- 10 principals and 3 vice principals were interviewed.
- 8 group interviews were held with classroom teachers

In Regions 1, 4, 5 and 6, semi-structured group interviews were conducted with education officers, senior education officers, and regional directors. The interviews were focused on determining the extent of each region's support for the implementation of the project in schools, and specifically, how the regions are organized and resourced to provide such support, including the role of the education officers.

- 28 education officers were interviewed in the 4 Regions, including five senior education officers and 3 officers with special responsibilities for projects funded by development partners.

The evaluators were also able to interview the Acting Permanent Secretary of the MOE, the senior education officer responsible for primary schools nationally, and the assistant to the Chief Education Officer charged with taking forward programs such as the JETP. Additionally, the Head of the JTC was also interviewed. Evaluators were unable to meet with any representatives from the NEI.

Key Limitations

The most important limitation to the methodology of this evaluation is the number of informants included. Although every effort was made to speak with a representative group of stakeholders, from senior MOE staff to classroom teachers and students' parents, the limited time available for field work, and especially for school visits, meant that there was no way to reach a statistically representative sample at the school level and below.

Resource teachers played a key role in the project, and even though, according to the project design, two resource teachers from each school were to be trained, the evaluation team was only able to observe three resource teachers while teaching, and was only able to interview ten. Many resource teachers were not teaching in classrooms at the primary level, having been assigned instead to higher grade levels. Whatever the reason, this small sample size also represents an important limitation to the methodology of the evaluation.

V. FINDINGS

This section is organized by the major questions posed for this evaluation. It begins by describing the role of the MOE, and in particular its regional offices, in project implementation. After that is a discussion of school- and classroom-level findings. It then compares student reading performance between those schools under the CBSI program and other JETP schools, and finally concludes with a discussion of the baseline data collection procedures.

Research Question:

A foundation of the JBEP project was the assumption that there is a robust enough education system for USAID to work at the regional level, enabling results to trickle down to the classroom level. Is this assumption valid?

FINDINGS AT THE NATIONAL AND REGIONAL LEVELS

The policy context

Although the report of the Task Force on Educational Reform affirmed the education system as “sufficiently robust to respond positively to transformative interventions” (2004: 3), the task force nevertheless recommended that the best way to raise and sustain students’ achievement would be through a comprehensive modernization of the MOE and a shift away from its operational, school-management role toward a more strategic, policy-based role.

The current round of restructuring of the Jamaican education system, which started in 2006, was therefore based on a vision of the central office of the MOE as primarily a policy organ. As such, it would support the work of the regional education offices (often referred to in national education policy documents as “regional authorities”) and other agencies within the education portfolio. In particular, these agencies included the Jamaica Teaching Council and the National Education Inspectorate, which were being established to provide quality assurance in teacher professional development and accountability for improvement in schools, respectively.

Also as part of the modernization process, the management of schools was to be devolved to regional authorities, with school administrators, school boards, and the regional offices working together to accomplish the MOE’s strategic objectives of improving schools and raising student achievement. However, the presupposition that these component parts of the education system are integrated, operating interdependently, and aligned to the common strategy, does not hold up under scrutiny.

Indeed, attempts at education reform are often impeded by difficulties in creating and implementing feedback systems that can energize and sustain change efforts. If the call for reform at all levels of education is to be met, attention must be given to establishing effective feedback mechanisms in educational institutions as they embark on improvement efforts. In other words, using a typology suggested, among many others, by Bain and Swan (2011: 673), this represented a break in the flow of information, undermining the extent to which the project was able to detect and correct errors in the implementation process.

What the MOU says

In order to determine whether the education system was robust enough to support the implementation of the project as it was designed, it is necessary to first review how the roles and responsibilities were intended to be shared among the various cooperating stakeholders. The full MOU between the project and the MOE is included as Appendix II of this report, and it contains a high level of detail on logistical responsibilities, including, for example, how lunches should be reimbursed. However, when it comes to

monitoring the trainings conducted by resource teachers in the schools, and to monitoring the actual implementation of the techniques in the classrooms, the MOU is much less prescriptive.

The only language outlining the responsibility of the project regional advisors related to monitoring or follow-up states that after the Phase II training, where resource teachers are trained, it is their responsibility to “liaise with the regional education officer on the progress of all training and follow-up activities.” Regarding the Phase III training, where resource teachers train their fellow teachers in their home schools, there are no responsibilities listed for any project staff. The only actor identified and tasked with any responsibility at this level is the regional education officer. According to the MOU, in addition to several items related to training logistics, she is to:

- Liaise with the principal of each school regarding the follow-up monitoring of teachers trained at the school.
- Monitor the quality of teaching of the teachers trained during phases II and III and the extent to which teaching adheres to the guidelines and principles presented at the workshops.
- Liaise with the principal of each school regarding the procedures established to ensure continued teacher development in the areas of reading and mathematics at grades 1-3.

It is clear from this language that regional educational officers were to have primary responsibility for the monitoring of project implementation. The next section examines whether and how that role was executed.

What actually happened

The project level

Although there was on-going monitoring and evaluation of project activities, including monitoring the number of teachers attending workshops, identifying gaps in training, following up with those teachers not attending, and overseeing the administration of the Early Reading Assessment Instrument (ERAI), which was used to gauge students’ overall performance levels, there was no explicit role for the project in monitoring the degree to which principals and teachers were implementing project strategies at the school level. It was envisioned that the project’s advisors assigned to the regions would “liaise” with education officers on matters relating to the workshops and other aspects of implementation. However, these relationships remained largely centered around logistical and operational issues related to the training workshops, and did not take on the bigger issue of how the strategies delivered through the training were being incorporated into the routine practices of teachers.

The central MOE level

Various formal and informal linkages were established between the MOE and the project. These mechanisms could have been used to share information about the progress of implementation. They include:

- The Project Steering Committee – chaired by the Permanent Secretary of the MOE, and also including the Planning Institute of Jamaica, The Ministry of Finance, USAID and other senior personnel from the MOE;
- The MOE Projects Meeting – convened by the MOE to provide a coordination network for projects funded by international development partners;
- Regular meetings between the project and various units, agencies and other senior personnel of the MOE;
- Meetings with the Minister of Education.

However, according to project staff, although they had the opportunity to voice concerns at these meetings, their concerns were not necessarily redirected to the regions and the education officers or subsequently followed up with action.

Research Question:

To what degree are the six Regional Offices supporting the implementation and monitoring the training received by teachers in the regions that they supervise? What factors contribute to success or pose challenges?

The regional MOE level

According to the terms of the MOU, regional education officers were expected to play a central role in monitoring the implementation of teaching strategies in classrooms, including following up on the implementation of the teaching techniques in the classroom. Unfortunately, in most cases, education officers do not fill this role, which means that the key function of project monitoring is left undone. The evaluators identified several reasons for this breakdown in project design.

Inconsistent communication and agreement on project roles and responsibilities

In many cases, the education officers at the regional level were not aware, or did not agree, that they were responsible for the monitoring and facilitation of the project at the classroom level. Education officers spoke of their responsibilities in terms of directives from the central office of the MOE, which were then communicated to the regional director often through a senior regional education officer, and eventually to the education officers. These multiple layers of communication often resulted in their receiving partial or no information about specific project content and roles. For example, several education officers said that they have insufficient information about key elements of the project, how it was designed to work, and the criteria for selecting trainers. Other education officers may have been aware of their responsibilities as laid out in the MOU, but still did not view these activities as the main part of their role as education officers. They still saw their role in the schools as one primarily of oversight, operationalized through interactions with principals, but not going into classrooms and monitoring what teaching techniques teachers were using.¹¹

Lack of guidance and training for operationalizing project monitoring

Though the MOU states that education officers are responsible for monitoring the implementation of the in-school trainings and the utilization of the teaching techniques in the classrooms, it offers practically no guidance in how this should be accomplished. Some education officers attended the Phase I and Phase II trainings in their role as logistical facilitators, but as a whole, there was no formal training to prepare the education officers to monitor implementation at the school and classroom level.¹² There were no tools, such as classroom observation rubrics, provided to education officers. In short, they were given the directive to monitor project implementation, but were given no guidance or training to allow them to fulfill that role.

Constraints on education officer time

¹¹ These findings were corroborated by interviews with school principals. Ten of the twelve principals confirmed that an education officer visited their schools during the current school year. Seven of them said that their education officers visited them at least once each term. The nature of these visits ranged from instructional to administrative duties. Some principals reported that their regional education officers took a “hands-on” approach to working in the schools, visiting classrooms, as well as checking the physical plant and examining school records. Others take a hands-off approach, providing more of an oversight role and working only through the principals.

¹² Although capacity building for education officers is not an overt aim of the project, quarterly monitoring evaluation reports have an indicator which aggregates the number of school administrators and MOE officials trained in leadership strategies.

Even if education officers understood and agreed that project monitoring at the classroom level was their responsibility, and even if they were properly trained and equipped to do so, many of them would find it difficult or impossible to find the time necessary to effectively execute this role. Given the number of schools assigned to each education officer, and the distance between schools, and the workload they have unrelated to the project, education officers are often stretched too thin to spend the amount of time in classrooms necessary to truly assess to what degree teaching techniques are being implemented in project classrooms. These constraints can be mitigated in some cases by thoughtfully assigning schools and other responsibilities to education officers, as discussed below, but the underlying lack of resources and overburdening of education officers at the regional level remains an obstacle to effective monitoring of project outcomes by the MOE.

Some regional MOE offices were structured in such a way so as to better facilitate the monitoring role as laid out in the MOU. For example, whereas several other regions had designated education officers for primary schools and others for secondary schools, Region 4 divided up its schools by geographic clusters or by quality education circles (QEC), and assigned these groups of schools to an education officer.¹³ This strategy minimizes the amount of time each education officer spends traveling among schools, allowing them to spend more time in the classrooms, developing relationships with principals and teachers and providing feedback on ways to implement the project techniques.

Other breakdowns in coordination

One instance where the education officers' shortage of time directly contributes to their lack of project-specific training occurs on national education training days. There are a limited number of these days, and on them, education officers have a variety of different duties. Therefore, it is common that some education officers are unable to attend the trainings and, as a result, have a limited understanding of the project and their responsibilities within it. At least one region, Region 5 has attempted to resolve this problem by assigning responsibility for specific projects to individual officers, and then requiring those officers to report back all of their fellow education officers within a certain period of time. Though strategies of this kind can certainly help mitigate the problem, these "catch-up sessions" obviously cannot replace the original trainings.

Another example of a lack of coordination, and one that has likely led to unnecessary duplication of effort, is the fact that even though the project had developed an early reading assessment instrument (ERAI), the MOE also developed its own informal reading inventory (IRI), which is similar in purpose to the ERAI. Therefore, although the project is well aligned with MOE pedagogy, purpose and policy, the existence and simultaneous use of both of these instruments indicates that coordination between the project and the MOE could be improved.

Broader accountability within the education system

Beyond the context of the relation between the JETP and the MOE, examination of MOE corporate plans, budget presentations, and NEI reports¹⁴ demonstrates that there has also been a larger, concerted focus on establishing a "results driven" ethos within the education system. As discussed earlier, the Task Force on Educational Reform (2004) focused on embedding accountability frameworks in the education systems through the establishment and rollout of the National Education Inspectorate. In a related vein, it has promoted the development of school improvement plans and an accountability matrix, which sets targets for all levels of the schools system including individual teachers. In theory, if these mechanisms were strong enough in their own rights, they would have supported the monitoring of JETP implementation as well.

¹³ A more detailed analysis of the variations of regional structures of the four regional offices that were visited as part of this evaluation is available as Appendix X.

¹⁴ For specific references, see Appendix XIII under the section on Government of Jamaica publications.

However, to a large extent, the results-based management accountability system appears to be applied mostly at the school level rather than within the structure of the MOE itself. Whereas several accountability measures have been established for schools as prescribed by documents such as the Task Force report and the *Vision 2030* national development plan, there is only a weak accountability framework (as well as a dearth of legislation supporting such a change), for performance standards, regulations, incentives and consequences for the MOE. For example, although, education officers are expected to play a critical role in ensuring that schools develop school improvement plans (SIPs), not all education officers participate in this activity. As a result, education officers are often limited in the influence that they might otherwise have on shaping teaching and learning through determining strategies and outcomes. Of importance for the current project, although literacy is designated as an area for improvement for most schools, the project's strategies for teaching reading are often not included in the SIPs. This may further explain why project tools and strategies that would help schools to achieve gains in literacy are not yet widely used in the schools.

FINDINGS AT THE SCHOOL LEVEL

Research Question:

To what degree have professional development training impacted school management and instruction at the classroom level?

To what degree are principals creating the environment to support the teachers to receive and implement the training by project staff and their peers?

What factors contribute to success or pose challenges?

This section discusses the findings at the school level, beginning with an overview of the sample schools visited as part of this project. The section also discusses the role of professional development for principals and teachers, and provides an assessment of the degree to which techniques promoted by the project were implemented by administrators, project-designated resource teachers, and other literacy teachers in the schools.

Project Training of Principals

Principals are incorporated into the project through the leadership training they receive from project staff. In turn, they are also expected to provide instructional leadership to their teachers. Although most of the principals included in the evaluation sample indicated their support for the project and those that had received training indicated an understanding of project pedagogical strategies, very few had a clear sense of whether the instructional techniques promoted by the project were actually being implemented in the teachers' classrooms. Most admitted that they rarely observed their teachers looking evidence of project implementation, and the absence of this feedback loop represents yet another crucial break in the flow of information within schools and consequently, between the schools and education officers.

Ten principals and three vice principals were interviewed in twelve schools. Vice principals were interviewed in schools where the principals were absent on the day of the evaluators' visit. Telephone interviews were conducted with one absentee principal following the school visit and one former principal who had received project training. Ten of these principals confirmed that they had received some training from the project. Eight of them reported attendance at two of the three training sessions provided by the project. The current principals at Padmore and Sudbury reported that they did not receive any project training. The former principal at Padmore reported that she had received the training prior to leaving the school. The topics that most principals remembered were leadership, governance and management.

Generally, the principals thought it was essential to receive training on the literacy strategies prior to the training conducted for resource teachers because it allowed them to support the resource teachers as they worked with the non-resource teachers in their schools. Several principals also explained how the training on school management techniques received through the project influenced the way they ran their schools. They specifically noted assessing the needs of students in their school and then taking initiatives to address those particular needs. They also discussed policies they had enacted to support school initiatives on student assessment and teacher learning. All the principals who received project training expressed gratitude for the project's contributions, while at the same time expressing a need for additional training for their staff and themselves, particularly on strategies for working with under-performing and difficult to motivate learners.

The impact that the professional development training has on school management and instruction at the classroom level depends on the individual who received the training. The evaluators noted that those individuals who attempted to integrate project strategies and techniques they learned during the project training were also the most willing to share it with others. These individuals also typically supported extending the training to all of the senior teachers in the schools in order to cement the shared vision for change among all the staff. In fact, in those schools with high levels of project implementation, principals did provide such training to their senior staff using project resources. Such activities clearly supported the project's goals.

Ways in which principals support the implementation of the project in their schools

In eleven of the twelve schools visited, respondents in the teacher group discussions confirmed that principals were trying to create favorable environments to support them in implementing the training, and interviews with principals also corroborated the teachers' views. Of all of the factors discussed below, the single most important factor in determining whether a principal took action to support the implementation of the project in their schools is a sense of personal ownership and buy-in to the goals and strategies of the project. If the principal viewed herself as an instructional leader, and believed in this kind of professional development as an effective means of improving school and student performance, then she was likely to support the project and it was more likely to view it as operating successfully in her school.

Principals and teachers identified a number of ways in which principals facilitate project activities in their school. The following points summarize the main ways in which principals are currently supporting the success of the project, based on information collected during school visits.

Emphasizing and demonstrating the importance of the project (institutional buy-in)

The principal is able to set the tone and act as an example for all other staff in the school. When she discusses the project and emphasizes its importance, both in formal settings such as staff meetings as well as in informal, individual conversations with teachers, it communicates to the other teachers that they should take the project and their responsibilities within it seriously. Some principals went further by reviewing lesson plans, conducting classroom observations and coaching teachers in need of extra support. Some principals also assigned other staff, such as guidance counselors and other support staff, to support project activities. In the schools where the implementation of the project seemed to be most successful, the principals and teachers even informed students' parents of the project and guided them on how to support their children using project techniques. These actions make it clear that the project is important, and that there is an expectation that everyone in the school will work to make it successful.

Granting resource teachers the authority and time to carry out project activities

In order for the project to be successful, the principal must enable the resource teachers to conduct in-school trainings, classroom observations, and other project-related activities. First, principals must make other staff aware of the identity of the resource teacher, and must make sure that they recognize the resource teacher's authority and necessity to carry out activities such as convening trainings and

observing classrooms. The principal must also provide auxiliary staff to supervise the resource teacher's classroom while he is conducting observations in other classrooms.

Making time available to all teachers to participate in project activities

Principals who were supportive of the project set aside portions of the regularly scheduled planning time (Thursday afternoons or national training days) for project training. This allows all teachers to attend the trainings and signals the importance of the project for the school.

Providing the necessary space and materials for the project

Obviously, but importantly, principals must also make available the physical materials necessary to implement the project, including meeting space and training handouts. One challenge, discussed below, is that according to a national suggested timetable for classes, all of the teachers in a given grade teach the same subject at the same time. However, if only one set of literacy materials is provided for each school, that means only one class in each grade can use the materials during their regularly scheduled reading class. In response to this timing conflict, some principals adjusted the timetable so that the reading class was taught at different times by different teachers, allowing them access to the project materials during the entirety of every reading class. This example illustrates how a principal's investment in the project and creative, strategic management of the school can create a supportive environment for the implementation and success of the project.

The role of resource teachers in in-school project trainings

The evaluators interviewed a total of ten resource teachers to obtain information about their experiences operating in this role of the project. Four of the resource teachers are presently teaching in grades 1, 2 or 3, and the remaining six resource teachers interviewed are teaching in grades 4 and 5 or in alternative literacy programs.¹⁵

Most resource teachers reported that they did carry out project activities, including trainings, classroom observations, or other types of follow-up, upon return to their home schools. The evaluators found three primary factors influencing the degree to which they were successful in implementing these project activities. They echo the findings related to principal's implementation.

Support from the principal

In some cases, resource teachers indicated that the principal had not allowed them the opportunity to work sufficiently with other teachers to conduct the training. Moreover, opportunities for resource teachers to observe in other classes are very limited, as it is difficult to secure time away from their own classes when they can enter and observe other teachers' classrooms. Although some principals do not support resource teachers' efforts to monitor the implementation of training, others fully support it by suggesting techniques for teachers to try when they review lesson plans or by circulating a notebook for teachers to record new techniques implemented in classes. Additionally, evaluators found that the resource teachers trained by the project did not always have a formal status in their schools. In one case, the resource teachers had not been introduced formally to the staff, nor did a specialized role within their schools' improvement plan. These factors undermined their authority to conduct important tasks with non-resource teachers such as ongoing training, classroom observations, and demonstration lessons. In one school, for example, the resource teacher stated that she presented the training materials to her staff but did not conduct observations or demonstration lessons because she did not receive authorization from her principal to conduct those activities.

¹⁵ The four resource teachers working in grades 1 through 3 were observed providing reading instruction and interviewed about their experiences as resource teachers. An additional 28 teachers were also observed for a total of 32 classroom observations.

Support from the regional education officers and project staff

Resource teachers only interacted with project trainers during training sessions.¹⁶ Follow-up school visits by project staff to schools included in the evaluation were not common except at a school that is conveniently located in Kingston. As a result resource teachers had no established procedure to gain clarity on specific content included in the training, as there were no established lines of communication with project trainers or regional education officers to express their concerns. In addition, a resource teacher would be unlikely to communicate project implementation concerns to an education officer, as most teachers would be reticent to “go over the heads” of their principals by doing so.

Professional and personal commitment

For the most part, based on the data collected from principals, resource teachers, and other teachers, the resource teachers were motivated to carry out the project activities as expected of them. In some cases, however, it became clear that a resource teacher’s lack of commitment to the goals of the project could cause a breakdown in the cascade model and prevent the dissemination of teaching techniques to her fellow teachers. The resource teacher at one extremely poor-performing school did not implement any training activities with the staff although she was instructed and facilitated to deliver it. The former principal stated that the resource teacher always reported sick on each occasion that the training was scheduled.

Selection of resource teachers, turnover and absenteeism

Principals and teachers indicated that resource teachers were selected because they have advanced degrees in reading and technology or extensive training in these fields. Although the project targeted training to grade 1-3 teachers, not all of the USAID-trained resource teachers were working as teachers of these grades in the schools visited for the evaluation.¹⁷ In addition to the grade 1-3 resource teachers observed, six resource teachers not presently providing instruction in grade 1-3 classrooms were interviewed about their experiences as resource teachers. These teachers explained that as experienced, trained and knowledgeable reading instructors, their classroom instructional skills are now targeted at students who have not been successful learning how to read in grades 1-3. All six of these teachers had advanced degrees and extensive experience in teaching reading.

Evaluators found that attendance at project training sessions was sometimes divided among several teachers at a school. One reason for this practice, given by school principals, was they felt that it was more equitable to send several different teachers to the training sessions offered by the project so that the pedagogical knowledge could be shared among the staff. Sharing training among different staff has some benefits. More teachers have professional development growth opportunities and more than one person can implement project training if other project-trained teachers are absent or transferred to another school. However, the project model’s design calls for individual resource teachers to receive multiple trainings for a more in-depth reinforcement of knowledge about reading strategies, which would be expected to result in significant changes in instructional practices.

One important factor influencing implementation of techniques learned through the project was the degree to which teachers attended all the training sessions. In some cases, staff turnover or absenteeism at the school meant that the individuals that received the training by the project had left schools or were absent during critical periods of the training cycle. When resource teachers were present at their

¹⁶ To some extent, this obstacle is likely to be mitigated from now forward, at least in the 34 schools in the 2012 cohort that have adopted a coaching model. Under this model, an experienced (often retired) teacher or ex-principal provides ongoing support for teachers. None of the 12 randomly selected schools in the evaluation sample, however, were included in the list of schools with coaches.

¹⁷ In some cases principals had sent teachers from other grades to the training; in other cases, teachers had moved from grades 1-3 to other grades since the beginning of the project.

schools and attended the training sessions there, they were more able to communicate the new teaching strategies to their colleagues. When they are not present at these important times, then this key link in the cascade training model breaks down, and the other teachers in the schools are not able to acquire and use the new techniques.

Challenges to project implementation at the school level

Most of the challenges to implementing the strategies presented in the trainings are linked to several factors, including the following, as pointed out in teacher discussions and interviews with principals:

Lack of follow-up by regional education officers

As described above, a key assumption of the project was that regional education officers would visit schools to monitor teachers in their classrooms. Some teachers and principals who knew of this part of the project design indicated that when education officers did not follow up on trainings and how the teaching strategies were implemented, the success of the program in a school was less likely.¹⁸

Lack of funding and materials

Some principals expressed concern about the cost of reproducing training materials and providing training equipment, such as multimedia projectors, to facilitate the training sessions at their school.

FINDINGS AT THE CLASSROOM LEVEL

Research Question:

To what degree are resource teachers implementing techniques learned through the JETP? What factors influence teachers' decisions to implement or not implement new teaching techniques?

The evaluators conducted a total of 34 classroom observations during their school visits, 4 of these in resource teachers' classrooms. Each observation lasted approximately 45 minutes. In addition, they interviewed 10 resource teachers, and conducted 8 group interviews, incorporating the perspectives of 72 non-resource teachers. Despite myriad obstacles to the "trickling down" of training to the classrooms, many techniques introduced by the project to resource teachers were observed being implemented in grades 1-3 during reading lessons, although not always in the ways intended by the project. A sampling of the most often observed reading strategies during the evaluators' classroom observations that were also included in project training, include: phonemic awareness and phonics; the use of extended text in readers; setting the scene for reading by identifying the title; predicting story content and looking at pictures; oral reading and pair reading; comprehension strategies including expressing facts; stating the main idea and details; reorganizing information; evaluating content; and creating new ideas. (Detailed information on the frequency of use of various techniques is included in Appendix VII: Summary of Classroom Data.)

¹⁸ Examples of schools with a history of infrequent visits by education officers were Effortville and Padmore Primary Schools, where principals cited location as a possible cause for the lack of oversight by regional education officers: Effortville, which performs toward the middle of scale on literacy tests (61 percent on the 2011 G4LT) in our sample, is however located in a volatile community near to May Pen, Clarendon; Padmore is a remote rural school in the hills of St. Andrew and is on the extreme low-end in terms of both literacy (29 percent) and degree of project implementation. In contrast, New Forest and Holy Family, both high-performing schools in terms of literacy (70 percent and 91 percent respectively) and the implementation of project strategies, report monthly visits and weekly phone calls from their officers.

Resource teachers

When resource teachers attended the full complement of project training sessions, evaluators found that there was an above average implementation of the techniques and strategies taught during the project training. Project-trained resource teachers were more likely to use multimedia tools such as CD recordings of books that students could listen to while looking at the text in a big book or smaller book. Resource teachers used active learning techniques in class as they engaged students, particularly boys, with stretches or catching a ball then answering a question. Instruction was differentiated for learners at different stages of learning by using small group instruction targeted at the identified reading level of the group. In one resource teacher class, groups of students were doing paired reading with a small textbook while others were identifying initial consonant sounds. In another, the teacher taught phonics linking the letter sounds with text while students decoded words in a storybook or on a worksheet.

Because resource teachers were selected at least in part based on their advanced study and experience in teaching literacy, it is impossible to know to what extent the project can be credited with the more frequent use of these techniques. It is likely that at least some of these teachers had been exposed to these literacy strategies before the project trainings. Still, it is important to note that attending project trainings was positively associated with greater implementation of project-promoted teaching methods.

Non-resource teachers: quality of in-school training

Non-resource teachers also claimed that they attempt to implement new techniques introduced to them by the project-trained resource teachers. These results were borne out to varied degrees in the classroom observations of non-resource teachers. One of the most important variables in the adoption of techniques is the quality and intensity of the school-level training that the non-resource teachers received.

In many cases, teachers felt that the quality and intensity of the school-level training was not adequate to impart sufficient information, for a variety of reasons. Some teachers felt that the resource teachers in their schools were unable to deliver effective reading instruction to their colleagues, and that this inhibited their ability to implement the new teaching techniques in their classrooms. Teachers felt that it was especially unlikely for resource teachers without a prior background or interest in reading instruction to conduct high-quality trainings in their schools. Teachers also noted that small rural schools are less likely to have a sufficient number of teachers truly qualified to serve as resource teachers.

Many teachers requested the need for trainers to come into the school to provide direct training to the teachers instead of through the resource teachers. Teachers at schools across the performance range indicated that they would prefer that project trainers could come into their schools to provide direct training to the teachers, instead of having just one or two teachers from their school receiving training and returning to train the others. They preferred that the material come from “the source” rather than as “second hand information.” Evaluators also found that implementation of instructional strategies gained during training was likely to be influenced by the perceived authority of the trainer, and classroom teachers indicated that they were more likely to pay greater attention to outside trainers who are presented as experts in reading instruction than to their colleagues who may not be.

Factors common to both resource and non-resource teachers

A number of factors influence both resource teachers and non-resource teachers when making the decision of whether or not to implement the project-promoted teaching techniques in their classrooms. The most commonly expressed ideas are summarized below:

Availability of materials

In every school visited as part of the evaluation, teachers mentioned as a limiting factor the lack of materials such as readers, phonics materials, manipulatives and computer-based didactic aids. Because

reading classes at each grade level are taught at the same time, materials that align with the training, particularly Jolly Phonics, are in high demand during that period. Without these materials teachers tend to postpone using the new strategies, often missing instructional opportunities when students are ready for specific types of learning. Some of the schools located in crime-ridden communities face security problems and sometimes suffer from break-ins, which can result in the loss of valuable resources and data.¹⁹

Fit with student needs

Another factor influencing decisions to adopt techniques was the degree to which teachers found specific practices appropriate for their students. Teachers stated in the group interviews that they try to implement new techniques introduced to them when they feel the technique suits the student needs, the topic being taught and the objective of the lesson. Related to this factor is an inherent weakness in the cascade model of training: it is natural for resource teachers to prioritize learning about techniques that will impact their own instruction first, believing, sometimes incorrectly, that if a strategy is helpful in their own classrooms then others could also necessarily benefit from it. Some non-resource teachers felt that, as a result, they were not getting the full content of the original project training, that what the resource teachers chose to emphasize may not be the most relevant for their own classes, and that as a result, the overall utility of the project was diminished.

Presence of external support

Echoing the findings noted above at the school level, teachers felt that they were more likely to implement the teaching techniques promoted by the project when another actor came to their classrooms to offer feedback and support. For resource teachers, this person could have been an education officer or a principal. For non-resource teachers, resource teachers are intended to play this role, as well as principals and education officers. As discussed at length above, oftentimes neither education officers nor principals actively fulfilled this role, leaving all of this responsibility to the resource teacher.

Personal and professional commitment to literacy and the project

In general, the teachers' were appreciative of the professional development training. However, some teachers were not moved by the concept. The case of one very low-performing school signaled this reality of reluctant teachers who do not care to participate in professional development activities. Although the teacher was assigned as the resources teacher and attended the training sessions, she did not conduct any session with her colleagues. She denied knowing of these responsibilities being a part of her duties. Additionally, teachers at a high-performing school indicated that "a passion for reading and for teaching reading" is important, as this passion acts as a motivator to teachers to use new techniques as well as assisting other teachers to implement new strategies.

Teachers' knowledge base

Evaluators also found that a willingness to adopt new methods depended on the teachers' knowledge bases, and that those teachers who have a background in literacy display greater willingness and ability

¹⁹As an example, the laptop donated by USAID to Effortville was stolen from the school, and this was particularly distressing because most of the electronic data related to project activities, including electronic portfolios ("e-portfolios") were not backed up. For a description of e-portfolios, see for example Barrett (n.d.). Project schools that receive these extra materials (CBSI schools) are encouraged to use electronic portfolios to support the continuous assessment of reading fluency, to assist students in creating digital stories, and to use interactive websites for literacy and numeracy enhancement. See, for example, USAID/Jamaica (2009).

to try new teaching techniques. Some teachers, especially non-resource teachers, expressed a hesitance to attempt to implement the project-promoted techniques. This reluctance was often heightened when they felt that the training they received from resource teachers was not of high quality.

READING PERFORMANCE BASELINE DATA

Research Question:

What were the challenges faced in determining the baseline data, and how were these resolved? Is the most recent 'baseline' data an accurate representation of the true baseline? If not, what steps need to be taken to establish an accurate baseline data set?

This section addresses concerns relating to the administration and results of the Early Reading Assessment Instrument (ERAI), which formed the basis of the two rounds of baseline data collection for the project. The ERAI is an evidenced-based instrument developed to assess four components of early reading (concept of print, non-word decoding, alphabetic principle and reading comprehension). The analysis presented here is based on the data generated from two administrations of the instrument, in 2010 and 2011, as well as the project's *Monitoring and Evaluation Report*, and *Report on the Administration of the Instrument*. The section is divided into two sub-sections: the first evaluates the validity of the data collection procedures in 2010 and 2011 as well as the construct validity of ERAI as a data collection instrument; the second focuses on differences in outcomes at the student and school levels.

Challenges associated with the 2010 baseline data

The distribution of the 2010 baseline student performance data showed the majority of students testing at or above grade level, which is a much higher proportion than would be expected based on previous G4LT results. For this reason, project staff questioned the reliability of the 2010 data. Evaluators investigated the 2010 data collection procedures to identify possible explanations for the unexpected results. Though the ERAI Administrators Manual contains a comprehensive set of instructions for test administrators to ensure that the scores obtained from the test are an accurate representation of the students' reading aptitude, and project staff did train teachers on these procedures, there was no supervision by project staff or other external agents during data collection. As a result, it is very difficult to ascertain, after the fact, to what degree these procedures were followed in each classroom. The following points explain some of the ways in which this lack of external supervision may have impacted the quality and representativeness of the data collected:

- *Non-random selection of students:* It is likely that teachers perceived some pressure to demonstrate higher student performance in order to make a positive impression on MOE officials and other stakeholders, and this pressure may have motivated them to deviate from the outlined procedures. Teachers could have selected students in a non-random way, choosing students they felt would likely score higher on the ERAI.
- *Coaching:* Without outside supervision, it would have been very possible for teachers to coach students or provide answers during the test. In either case, the answers recorded and scores tallied would not represent the true abilities of the students tested, and the overall score would be higher than expected. The evaluators found no evidence to cause them to believe that cheating did occur, but without the presence of external test administrators, this risk must also be taken into account.
- *Insufficient time for testing:* Each classroom of students was very likely supervised by a single teacher, as staffing constraints at schools would usually prevent multiple teachers in one classroom. The administration of the test with one individual is anticipated to take up to twenty minutes, but the length of time would obviously vary from child to child. Therefore, it is possible

that some students did not receive the requisite time to complete the test, if other students finished early and the supervising teacher felt that he or she had to conclude the test administration early.

The possibility for these types of irregularities means that the lack of external supervision during testing represents a meaningful threat to the accuracy and reliability of the 2010 baseline data. The following other problems with the 2010 data set were noted.

- *Sample selection:* The stratified random sampling approach designed by the project was to use ten percent of the 250 schools in the project, including 8 schools provided with CBSI support. The number of students drawn from each school was based on the school population: schools were broken down into small, medium and large schools, with 30, 20 and up to 5 students being drawn from each type of school, respectively, yielding a total sample of 870 students. From the data, it is clear that this sampling methodology was not followed, as some schools contributed data from more students than they were assigned, and some fewer. In addition to the question of non-random selection with the schools, discussed above, this deviation from the data collection design also calls into question the representativeness of the 2010 data set.
- *Lack of control schools:* The 2010 baseline did not include any data from non-JETP schools. This absence of comparison or control data is not a threat to the quality of the data collected itself, but it is a weakness if the mission intends to conduct some type of rigorous quasi-experimental impact evaluation at the end of the project.

Efforts to remedy the challenges in 2011

The project recognized, based on review of the outcomes, that the student performance scores collected in 2010 could not serve as the basis for a high-quality baseline. In order to resolve some of the issues described above, it conducted a second round of data collection in 2011, making several key changes, described below.

- *Use of external administrators:* For the 2011 data, the project shifted to using external enumerators. These persons have a background in education and included trained teachers on leave, student teachers and retired teachers and principals. It was expected that the training would provide these persons with the requisite knowledge and skills to accurately administer the tests. These enumerators also have no obvious motivation to prefer higher (or lower) scores for any particular student or school, and therefore the risks of improper student selection and coaching are lessened.
- *Larger, more representative sample:* The project also attempted to enhance the reliability of the data by increasing the sample size of schools from 25 in 2010 to 54 in 2011. This new sample set included 10 CBSI schools, or nearly 20 percent of the total. The overall sample size increased to 2761 students, which is approximately 15 percent of the total number of students involved in the project. Given the supervision from and close interaction with the project staff, it is much more likely that the external administrators adhered to the sampling design, minimizing the threats to data quality discussed above. Analysis of the 2011 data also matches much more closely the score distribution from previous literacy assessments of this population. As a result, the student performance data collected by the project in 2011 does represent an accurate and reliable picture of student reading abilities at that point in time.
- *Addition of control schools:* The 2011 data collection also included non-JETP schools that could be used as comparison or control schools in any future impact evaluations. Again, though the inclusion of these schools does not help improve the quality of the data collected from project schools, it will provide more options for quasi-experimental evaluation designs in the future.

Construct validity of the ERAI

The National Reading Panel (NRP, 2000) and The National Early Literacy Panel (NELP; 2008) evaluated thousands of early reading studies to determine what skills or skill areas literacy teachers should target for instruction (Bursuck and Blank, 2010: 422). In both panel syntheses, five key skill areas were identified as essential for effective reading instruction. These areas are: phonemic awareness, phonics, fluency, vocabulary, and reading comprehension. The ERAI includes all of these key elements. In addition, it includes the concept of print, which although a pre-requisite skill, is not identified as a key skill in the literature.

The ERAI also reflects the theoretical construct of reading employed in the Early Grades Reading Assessment (EGRA), the MOE's Informal Reading Inventory (IRI) and the Centers of Excellence's Caribbean reading standards achievement test. A review of the project's reports on the development of the instrument shows that there has been a rigorous attempt to ensure that the instrument incorporates evidenced-based formulations of reading. Calculation of the reliability coefficients (Kuder-Richardson-20, KR20) shows results of 0.785 for the Form B of the instrument used in 2011, and, 0.818 for the Form A used in 2010. As an indication of internal consistency, one can be fairly confident that these instruments will produce reliable scores in alternate forms and over time.

All the reading skills indicated by the NRP (2000) as fundamental to reading are included in the ERAI. As far as the validity of its content or construct, the ERAI aligns very well with the requirements of the Revised Primary Curriculum and the Revised Standards and with the literature on the essential components of literacy, and is therefore quite strong.

To summarize, there were several important challenges in the 2010 round of data collection, namely: test administration by teachers themselves, sample selection, and lack of a control group. In 2011, project staff addressed many of these challenges through the use of stratified random sampling, external administrators, a larger sample, and the addition of a control group. An examination of the validity of the ERAI as a literacy assessment tool also found that it aligns well with the national curriculum and best practices.

Remaining Challenges

The collection of data using the ERAI is to a large extent driven by the project's mandate and resulting performance indicators. As a result, the focus on grade 2 students in the most recent phase of the project means that the sample tested has been narrowed. Not testing students from other grades means that the project is less able to understand the starting situation and needs of its beneficiaries, as well as ultimately its impact on those students.

Moreover, by using the assessment exclusively as a summative tool for comparing data across schools and across years, rather than as both a summative and formative tool, teachers and school administrators do not have the opportunity to use the data to track reading abilities, inform teaching practice, or otherwise strengthen approaches to teaching reading in the early grades.

Finally, there are still a number of potentially confounding variables, which would be very difficult to control for if any evaluations were to attempt to draw conclusions about causal impact based on the quantitative data collected by the project, even those data collected in 2011. As many of the schools are in high-need and crime-prone communities, the evaluation team observed that there were several projects targeting student achievement running concurrently in these schools. Similar programs may or may not also be operating in the control schools, and as they were not selected for inclusion in the sample until 2011, parsing out the influences of multiple interventions, while also controlling for other relevant community-level and household-level factors, will continue to be a challenge.

Research Question:

Are there differences in reading test scores at the Grade 2 level between project schools that have been given resource materials (CBSI) and similar JTEP schools that have not (non-CBSI)?

Results of the 2010 Baseline

The ERAI 2010 data included a sample of 881 grade 1 and 2 students in 26 project schools designated as non-CBSI and CBSI. The breakdown of the sample can be found in Appendix XI.

Reading Performance between CBSI and Non-CBSI Schools

The mean reading level for all grade 2 students in the CBSI schools was 4.2, compared to 4.6 in non-CBSI schools. Based on the results of a t-test, also included in Appendix XI, this difference in mean scores was found to be significant at a 95 percent confidence level. In other words, based on the 2010 data, grade 2 students in non-CBSI schools did score higher, on average, than their counterparts in CBSI schools. To determine whether this difference was meaningful, the evaluators did further analysis to determine effect size, based on an estimate of eta squared. Using this method, the effect size was found to be 0.101 or about 10 percent.²⁰ This substantial effect size would indicate that the observed difference in mean scores is not only statistically significant, but that the difference is also likely to be important in a practical sense from the perspective of project leaders and other stakeholders.

However, it is important to note that it is impossible to infer causality based on these observed differences only. The data analyzed does not allow for the control of a variety of potentially confounding factors, such as household and community poverty, parental education and involvement in the child's education, pedagogical practices in the school, and many more. This limitation is especially important to keep in mind when comparing CBSI and non-CBSI schools, as CBSI schools were selected specifically because they are located in crime-prone communities, and crime rates are likely correlated with many of these other influential factors. Additionally, the quality of the 2010 data overall is called into question by the issues raised in the section above, so project staff should use caution when drawing any conclusions from this data.

Gender analysis of 2010 ERAI data

The evaluators also investigated how grade 2 students' reading performance differed when disaggregated by sex and CBSI status. Appendix XI contains a summary of the mean scores of different groups of students. T-tests were performed to determine whether observed differences in mean scores were statistically significant. Overall, girls outperformed boys by a mean difference of 0.79 points or nearly one grade level. Results show that there are no statistically significant differences between the average reading performance of CBSI boys and non-CBSI boys. However, there are statistically significant differences between the average reading performance of CBSI girls and non-CBSI girls. There is no statistically significant difference in mean reading scores between CBSI boys and CBSI girls, though this may be in part due to the relatively small sample size, which diminishes the power of the analysis, making it harder to detect any real differences in the population. For non-CBSI schools, where the sample size is larger, there is a significant difference between non-CBSI boys and non-CBSI girls. In this case, given that these comparisons are being made between groups of boys and girls from the same schools and

²⁰The effect size is helpful in providing some insight into the extent to which the significant difference of the mean scores is actually meaningful. Given that the test of significance is affected by the sample size, the effect size is a 'truer' measure of significance. See Coe, R. (2002) "It's the Effect Size, Stupid: What is effect size and why is it important." Paper presented at the Annual Conference of the British Educational Research Association, University of Exeter, England, 12-14 September 2002.

communities, it is more likely that these observed differences in reading performance are related to the student's sex, and not to other confounding factors. This finding backs up other recent research which shows a serious gap among Jamaican primary school students. In Jamaica, between 2009 and 2011, on average, 10 percent more girls gained mastery in the grade four literacy test than boys, with the gap being widest on the reading comprehension task (Edwards-Kerr, 2013 in preparation).

Results of the 2011 Administration of the ERAI

The ERAI 2011 data included a sample of 2761 grade 1, 2, and 3 students in 52 schools designated as control, non-CBSI and CBSI. Appendix XI summarizes the breakdowns within these groups.

Comparison of Reading Performance between CBSI and Non-CBSI Schools

The evaluators conducted a similar analysis of the data from the 2011 round of data collection. The mean reading score for all grade 2 students in CBSI schools in 2011 was 3.3. For this year, the mean reading score for their non-CBSI counterparts was found to be 3.1. This difference of 0.2 points was not found to be statistically significant at the 95 percent confidence level. The eta squared was only 0.004, or 0.4%. In other words, there is no meaningful difference between the average student performance in reading between CBSI and non-CBSI schools in the sample. Again, it is important to reiterate that this analysis does not control for other factors that likely differ systematically across schools and correlate with CBSI status, and that therefore these results cannot be used to infer an impact (or lack of impact) of the CBSI intervention.

Gender analysis based on 2011 ERAI data

The evaluators conducted similar analyses of the 2011 data broken down by the sex of the student and CBSI status, and these results are presented in Appendix XI. Based on the 2011 data, there were no observed statistically significant differences between the mean student reading scores of CBSI boys and non-CBSI boys. There were also no statistically significant differences between reading performance scores of CBSI girls and non-CBSI girls. Again, not surprisingly, a gender gap was observed within both the CBSI and non-CBSI schools. These differences in mean scores were found to be significant at a 95 percent confidence level. These findings lend credence to the hypothesis that the expected gender gap was not statistically significant in the 2010 data for CBSI schools due to an insufficient sample size necessary to detect a real difference in performance based on the student's gender.

In summary, the 2011 baseline data shows no significant difference between the reading scores of students in CBSI and non-CBSI schools. Based on the overall validity of the data collection methods used during this round of data collection, it is expected that this finding would hold across the general population of students in project schools.

VI. CONCLUSIONS

Principals and resource teachers appreciated and successfully implemented the new techniques learned through the project training

Resource teachers and principals expressed overwhelming satisfaction with the trainings they received. With few exceptions, they believed that the project trainings were relevant and helpful, and they also implemented the techniques they learned into their daily work. The cascade model relies upon project-trained trainers to train these resource teachers and principals in new school management and teaching techniques, and based on the data collected through this evaluation, this part of the project has overall been successful over the past two years.

The cascade training model broke down at the school level, as resource teachers did not consistently convey project-promoted strategies to their colleagues.

The next step of the cascade model requires resource teachers to convey the knowledge they gained from the project trainings to their colleagues, and it was at this point that the cascade model started to break down. Principals have not always provided resource teachers with the institutional support they need in order to conduct in-school trainings, classroom observations and other follow-up activities. Resource teachers have not always been able or willing to reliably reproduce the high-quality trainings they received, reducing the knowledge transfer and the buy-in on the part of the non-resource teachers. The project model also places the main responsibility for monitoring the implementation of the project at the school level on the regional education officers, who, for reasons discussed below, rarely executed this role. In short, the cascade model broke down at the school level, as the quality and consistency of in-school trainings did not match that of the trainings carried out by the project and the JTC at the regional level. As a result, the utilization of project teaching techniques by non-resource teachers was very inconsistent, based on classroom observations and interviews with teachers. The project's expectation that these skills and practices would trickle down to the classroom level was not fulfilled to the degree that it expected.

The Jamaican education system is not robust enough at the regional level to fulfill the project monitoring role assigned to it by the project MOU without greater support from JETP.

Central to this evaluation was the question of whether the Jamaican education system is currently strong enough to take project staff out of the schools and rely on the cascade model to convey capacity from the regional offices to the classroom. Over the past two years, within the context of this program, the answer to that question is no. The regional education officers were able to facilitate the trainings at the regional level, but proved unable to successfully monitor and provide feedback on the in-school trainings and classroom implementation of teaching techniques, responsibilities primarily assigned to them by the MOU between the project and the MOE.

There are a variety of reasons for this breakdown, some of which could have been remedied by better project planning and coordination between the project staff, the MOE, principals and teachers. In many cases, regional education officers were unaware that monitoring of the project outcomes at the school and classroom level was their responsibility, indicating a failure of communication within the ranks of the MOE. The MOU, while assigning responsibility for monitoring to education officers, provides no guidance or mechanisms for how they should carry out this monitoring function. These difficulties could have been to a great extent avoided with better advanced planning, clearer guidance in the MOU, and better subsequent communication within the MOE.

A more significant obstacle to the effective monitoring of the project by education officers, and one directly related to the capacity of the education system today, is the insufficient level of project-targeted

support and resources made available to them by the MOE and the project. They received little, if any, training and no tools to monitor program implementation at the school and classroom level. They were assigned these additional responsibilities when the MOU was signed, but given the number of schools each education officer is responsible for, the resulting number of classrooms under their watch, the distances between schools, and their workload not related to the project, it is unreasonable to expect them to be able to effectively monitor and provide feedback on the implementation of the project at the classroom level. If education officers were given the requisite support, including training, tools, and time, then this aspect of the project design could theoretically function as it was intended. But the education system as it currently stands does not have the capacity on its own to fill this role without more support from the project.

This finding also has important implications for USAID as it moves ahead with implementing its new USAID Forward policy guidance, which encourages a greater investment in and collaboration with local organizations, both public and private. Increasing reliance on and development of local capacity is a worthy aim and is absolutely necessary in order for USAID's efforts to have a long-term, sustainable impact. At present, however, USAID must thoughtfully consider how best to structure these partnerships and blend local and international capacity, so that current projects have the requisite resources and capacity to be successful. Failing to get this balance right places both the short-term and the long-term success of USAID's programs at risk.

Using a larger, more reliably random sample, including control schools and having student testing overseen by external administrators has improved the accuracy and reliability of the data collected in 2011 versus the data collected in 2010, resulting in an accurate representation of student performance in project schools.

The evaluators agree with the project leadership that the 2010 data did not provide an accurate and reliable measure of student literacy in project schools. Relying on teachers to collect the data on their own students raises the risk of irregularities in student selection and testing procedures, likely introducing bias into the sample. By switching to external enumerators hired by the project and increasing the overall sample size for the 2011 data collection, most of these risks have been minimized, and the resulting data set provides a more accurate representation of student performance in project schools. The addition of student data from non-project schools will also increase the options available if USAID wishes to measure project impact at its conclusion.

There is no statistically significant difference in overall grade 2 student performance between CBSI and non-CBSI schools based on the 2011 ERAI data.

Statistical analyses of the Grade 2 student performance data based on the ERAI scores from 2011 show no statistically significant differences between the mean scores of students in CBSI schools and non-CBSI schools. These findings mean that, even though the CBSI schools were selected based on their location in crime-prone communities, there is no meaningful difference in average student performance between the two groups. It is important to note, however, that the analysis conducted here does not take into account a number of potentially confounding factors, and that in order for future conclusions to be drawn regarding project impact, more data will need to be collected and incorporated into future analyses.

VII. RECOMMENDATIONS

Priority recommendations

The priority recommendation is that the project, with support from USAID, better define and operationalize the monitoring role among key partners, namely the MOE regions, the JTC, and project regional staff liaisons. As part of this effort,

MOE regional directors should:

- Increase the awareness of regional education officers about the project, its design, content, and expected outcomes.
- Emphasize the expected role of education officers in contributing to school improvement and raising student achievement.
- Clearly articulate the role of education officers in the monitoring of the project
- Ensure that education officers have sufficient resources, especially including time, to carry out their intended role within the project.
- Clearly identify point-persons to oversee projects and to act as the liaison between these projects and the regional education offices.

The project staff, in consultation with JTC and the MOE should:

- Develop concrete tools, including monitoring and observation instruments, as well as associated training to allow project staff, education officers, JTC coaches, or other appropriate school-based monitors to provide “real-time” feedback on key aspects of project implementation at the school level.
- Modify the project’s monitoring and evaluation plan to include appropriate sections reflecting school- and classroom-level feedback for quarterly reporting purposes.
- Provide training to the project’s regional advisors in monitoring and reporting on implementation findings at the school level.

Regional education offices were established to promote the effective management of schools, but have yet to adequately fulfill this role. For that reason, USAID, and as appropriate, other organs of the US government (State Department’s CBSI and Public Affairs efforts), should:

- Promote greater devolution of authority within the regional education system to give regional education officers a greater role in developing and implementing school improvement plans.
- Advocate for increasing the pace of the Education Transformation Program at the regional level, by specifically encouraging the MOE to establish and entrench an accountability framework with standards, regulations, consequences, and rewards.
- Promote the passage of enabling legislation that would further support these objectives.

USAID should:

- Support a return to good practices noted in previous projects, particularly those which foster greater direct involvement of project staff in schools and classrooms. Project activities should include regular school visits, classroom observations, and regular feedback for teachers and administrators on implementation of project strategies.

Other recommendations

The evaluation team recognizes and encourages the use of school-based coaches, which has been occurring since fall 2012 in 34 of the project schools in the new cohort. Building on this model, and as budgets allow, we recommend that the project:

- Reduce the degree of dependence on the cascade model by providing more direct training and other classroom-based support to classroom teachers.
- Continue to emphasize in teacher training workshops and through coaching:
 - Working with struggling readers and writers
 - Aligning the standards and benchmarks to the revised primary curriculum
 - Improving school management.

Staff turnover in schools, especially among principals, limits the likelihood of successful project implementation. For these reasons, the project staff should institute the following procedures in selecting school administrators for training sessions:

- Training should include strategies for principals to guide vice principals and guidance counselors, including them as part of the leadership team, and thus distributing responsibilities for meeting project goals and implementation oversight.
- In those cases in which it appears that there is a reasonable likelihood that a principal will not remain in the school for a period of two or three years, a vice principal or other staff member that is likely to assume a school leadership role should be invited (either instead of the principal or in addition to the principal, as budgets permit) as a means of “succession planning” and to increase the likely sustainability of the project’s goals.

Materials provided by the project are highly appreciated. The evaluators recognize that with the project’s shift to serving primarily CBSI schools, a higher proportion of project schools are likely to benefit from a higher level of resources than was the case previously. The project, with USAID support, should take advantage of this opportunity to help address the gaping gender gap in which boys significantly underperform girls at the lower grades.

For this reason, both the project and MOE should:

- Increase provision of high-quality reading materials and manipulatives to schools, particularly those materials that are most likely to engage the interest of young boys and increase their reading proficiency.

The evaluation also noted issues with identifying resource teachers. The evaluators recognize inherent constraints, particularly in smaller schools with a limited number of staff. However, within the limits of these constraints, all partners, including the project staff, MOE, and USAID should encourage the institutionalization of a resource teacher model at the lower primary level. To the extent that the current cascade model is continued, in order to better prepare a future cadre of specialists in early grade literacy, the project should:

- Prepare and distribute detailed guidelines and criteria for the selection of resource teachers, especially targeting those with a background in literacy teaching and who are currently teaching literacy in these grades and likely to remain in that position.

In regions with a number of small schools, the MOE, through its regional directors, should:

- Group schools for professional development to assure that an experienced literacy teacher provides instruction when using the cascade model approach.

Principals, with the support of education officers and project staff, should:

- Grant resource teachers greater authority and time to conduct important tasks with non-resource teachers such as ongoing training, classroom observations, and demonstration lessons.
- Provide incentives to those teachers that adopt innovative practices and commit themselves to the improvement of the school's literacy plans.
- Hold non-resource teachers accountable for their roles in the implementation of project goals, for example by requiring them to maintain records of their use of the project strategies and resources.

Although the evaluators did not assess the informal reading assessment (IRI) used by the MOE and are therefore unable to compare this instrument with the ERAI, they found that the ERAI aligns with the MOE's revised primary curriculum and standards and essential components of literacy measurement tools. Moreover, although ERAI was used by the project to gauge overall reading performance of students for baseline data, it also has value as a tool for formative assessment.

Therefore, the project and MOE should:

- Harmonize the use of ERAI and the IRI in primary schools to avoid potential duplication of effort.
- Train teachers and administrators in the use of ERAI or similar formative assessment instruments for measuring students' reading progress over time, and thus enabling teachers to identify in a timely way those students who will need ongoing intervention before they take the grade four literacy test.

VIII. DISSEMINATION PLAN

The evaluators hope and intend that project staff and other stakeholders use the results of this evaluation to better understand how the project has performed over the past two years and to inform project decisions made in the future. To this end, a stakeholder meeting was held at the end of the field research period, in which the evaluators presented preliminary findings, conclusions, and recommendations to representatives of the central and regional MOE offices, principals, teachers, USAID staff, and project staff. The majority of the participants actively engaged in the conversation and provided the evaluation team with valuable feedback, which was incorporated into the final version of this report. Based on conversations with USAID/Jamaica and others in Jamaica, the evaluators anticipate that a wide range of stakeholders will be interested in the results of this evaluation, including the MOE, as well as the Ministries of Finance, Youth and Culture, and the Planning Institute of Jamaica, among others. The evaluators will send hard copies of this report to USAID/Jamaica, the Planning Institute of Jamaica, and the MOE, including all its regional offices. The evaluators will also make an electronic copy of this evaluation report available in digital form at the USAID Development Experience Clearinghouse website (dec.usaid.gov), so that it is available to all of these actors and to the general public. They will then send follow-up emails to key informants who participated in the evaluation, notifying them of the completion of the evaluation and providing them with an electronic copy and information on how to access this report online.

IX. APPENDIX I: STATEMENT OF WORK

STATEMENT OF WORK

FOR THE MIDTERM EVALUATION OF THE JAMAICA EDUCATION TRANSFORMATION PROJECT (JETP)

USAID/JAMAICA

Program Identification Data

Program Title: Jamaica Education Transformation Project (JETP)

Program Number: AID-RAN-I-00-09-00019, TO: AID-517-TO-12-00001

Program Dates: October 15, 2012-February 15, 2013

Program Funding: \$202,866.86

Implementing Organization: Juarez & Associates

Agreement Officer Technical Representative (AOTR): Claire Spence

I. BACKGROUND

USAID's Jamaica Education Transformation Project (USAID/JETP) supports the Government of Jamaica's (GOJ) education transformation efforts to increase access to economic opportunities for Jamaican children, through an improvement in the delivery system for educational services. The focus of the USG efforts (under Goal 3 of the Jamaica Country Assistance Strategy: Investing in People) is improved early grade (1-3) reading instruction and reading delivery systems; increased acquisition of foundation mathematics skills in Grades 1-3; and greater engagement, accountability, and transparency by the educational system, as a whole. The project works with new education entities namely: the Jamaica Teaching Council; the National Education Inspectorate; and the six Regional Education Offices, in order to effect change in 250 low performing schools across the island. An MOU between the JETP and the Ministry of Education, and Terms of Reference between JETP and the Jamaica Teaching Council were developed and agreed to by all parties. Student achievement results after one year of the project indicate that one year may be too early to see dramatic increases since these may concomitant an increased capacity of school leadership with reading as a driving goal. However, the USG's efforts over the last several years set a firm foundation for the transformation of the Jamaican education system and for the first time early grade teachers have mathematics and reading standards, and benchmarks to implement in their classrooms. Juarez and Associates have worked on mathematics activities from the inception of the project and will discontinue all these activities beginning September 2012 in compliance with the USAID education strategy. Comparisons of the percentage of students achieving reading mastery on the 2009 and 2011 4th grade national exam may provide an indication of school-level impacts.

The Development Problem:

The USAID/Jamaica's basic education project is a response to support the Government of Jamaica's efforts to improve early grade reading and mathematics in Grades 1-3 of 250 of the poorest primary and All Age schools in Jamaica. Recent studies revealed that while the GOJ through the Ministry of Education has taken measures to build and transform the education system, there is still the need for greater efforts to be placed on improving the island's overall education system. Selected challenges facing the system include: poor quality of instruction; inadequate teacher training and retention; underperformance and gender imbalances; lack of physical and human resources; and the influence of various negative socio-cultural variables. Although Jamaica has achieved near universal primary and secondary education enrolment, the issue of quality remains a challenge for the Government of Jamaica. Literacy rates remain low in and out of the school system especially in lower income communities. The percentage of Grade 4 students certified literate in 2010 is 67%, indicating the performance dilemma within the education system.

The Government of Jamaica hopes to achieve 100% literacy at Grade 4 by 2015. In order to achieve this target, the Ministry of Education introduced the Competence-Based Transition Policy in 2009 to regulate the flow of children from the primary to the secondary level. The new direction is linking eligibility for the Grade Six Achievement Test (GSAT) to certification in literacy based on the externally administered Grade 4 Literacy Test. Students who are still operating below the required grade level having not attained mastery of the Grade 4 Literacy Test have been transitioned into the Alternative Secondary Transitional Education (ASTEP). This program is designed to provide a safety net for children at the end of the primary level who will require special intensive support and intervention to advance to the next stage. ASTEP is a two year transitional program, and students will be assessed at the beginning and throughout the program. They will not be lost and possibly ignored in the system but will be prepared for secondary education so that they can make a meaningful contribution to Jamaica. At the end of the first year of ASTEP, some students will transition to secondary schools and therefore it must be clearly understood that this is being done in line with assuring that "every child can learn, every child must learn". It symbolizes mutual respect for individuality of Jamaican children as the GOJ seeks to put the systems in place to have students achieve their true potential. This program seeks to deliver literate children to the secondary system. The USAID/Jamaica's Basic Education project aims to assist the GOJ in its goal of increasing the percentage of students reading and mastering mathematics concepts at their appropriate grade levels in the early grades, Grades 1-3, and enabling them to advance to Grade 4 in order to pass the Grade 4 reading and mathematics examinations.

II. PROGRAM DESCRIPTION

The Jamaica Basic Education Program (JETP) falls under USAID/Jamaica's Assistance Object 4 (AO4) entitled *Education Transformation Program Strengthened*, which contributes to the achievement of Jamaica's Country Assistance Strategy Priority²¹ Goal 3 of *Investing in People*. The JETP addresses four Intermediate Results (IRs) under AO4: IR 1: Increased early grade (1-3) reading fluency; IR 2: Increased acquisition of foundation math skills in grades 1-3; IR 3: Public-private partnership for education strengthened; and IR 4: Improved capacity of the MOE, the National Education Inspectorate (NEI), and the Jamaica Teaching Council (JTC) to monitor school management and performance.

²¹ Jamaica Country Assistance Strategy, 2010 – 2014 (http://pdf.usaid.gov/pdf_docs/PDACN035.pdf)

The JETP supports activities that will play a crucial role in the education transformation efforts of the Jamaican Ministry of Education (MOE) and is informed by the GOJ's priority National Outcome 2 of *Vision 2030 Jamaica*²², "World-Class Education and Training". The MOE's policy direction in 2010 was, 'No child will be allowed to sit the Grade Six Achievement Test (GSAT) unless he/she is certified literate'. Emphasis is on improving education outcomes by improving student learning through children's ability to read. Through the JETP, USAID is assisting the MOE to improve primary school student performance in reading and mathematics; strengthen accountability in the primary education system through use of measurement tools and establishment of standards; and build regional capacity for school management oversight. The project is implemented in 250 poor performing schools in the six education Regions.²³

The development of the JETP was informed by the USAID evaluation of the Expanding Educational Horizons (EEH) project²⁴. The evaluation focused on three basic issues: EEH's accomplishments; its impact to date; and whether and how successful practices may be incorporated in the national primary education system and, thus, replicated. The evaluators found that in all significant respects, EEH's school development work was a major success. Regarding replication, the team concluded that the best way for USAID to obtain major returns from its investment in Jamaican primary school development would be to partner with the MOE on implementing selected components of the Education Transformation Project (ETP²⁵ is a Ministry of Education project). The JETP also conducted an Action Research in two project schools to determine how boys and girls learning can be improved and to investigate whether gender of the student was critical to reading improvement.

Targeted Groups

The USAID/Jamaica's JETP is being implemented in 250 schools divided in six education regions throughout Jamaica.²⁶ There are 54 schools in crime prone communities.²⁷ These were separated so that they could benefit from special treatment under the Caribbean Basin Security Initiative (CBSI) program. CBSI is a, "multiyear, multifaceted effort by the U.S. Government and Caribbean partners to develop a joint regional citizen safety strategy to tackle the full range of security and criminal threats to the Caribbean Basin". Of the 250 project schools, 54 are funded by CBSI funds, in addition to receiving training and support to teachers, school administrators, and regional education staff, also received school resources including lap top computers, mathematics libraries and reading libraries. The remaining 196 schools benefited from similar training but USAID resources were not enough to purchase classroom libraries and computers.

The Evolving Approach to Implementation

²² www.vision2030.gov.jm/

²³ See maps in Annex No. I

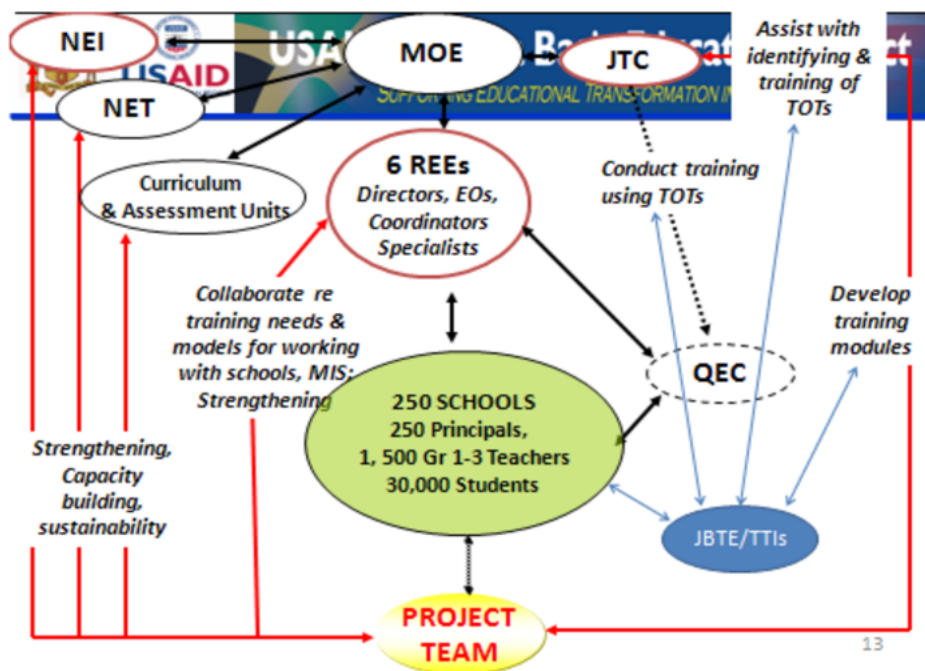
²⁴ Evaluation of the Expanding Education Horizons Project, October 2008
http://pdf.usaid.gov/pdf_docs/PDACN844.pdf

²⁵ The ETP was renamed Education System Transformation Programme in June 2010

²⁶ See Annex I

²⁷ See Annex 2

The JETP is managed by a project implementation team led by a local Chief of Party who reports to USAID/Jamaica through the Contracting Officer's Representative (COR). During the early phase of the project, USAID conceptualized the diagram below to explain the relationship among the agencies: the National Education Inspectorate (NEI); the Jamaica Teaching Council (JTC); the National Education Trust (NET); the Regional Education Entities (REE); the Quality Education Circles (QEC); the Joint Board of Teacher Education (JBTE); the Teacher Training Institutions (TTIs); and the Trainers of Trainers (TOTs). The diagram below was developed in the early stages of the project when we were trying to understand the connectivity between the various entities but the operations were changed – especially in relations to the NEI, the NET and JBTE and the TTIs. This was of significant importance because the regional directors and school principals and staff needed some clarity regarding the transformation activities of the MOE. The only entity that the project did not work with closely was the NET. The National Education Trust was still developing its strategic direction. The project engaged a tax consultant to provide technical assistance regarding contributions to the NET.



JETP Activities

USAID's efforts over the first two years of the project set a firm foundation for the transformation of the Jamaican education system because for the first time early grade teachers have mathematics and reading standards and benchmarks to implement in their classrooms. The JETP has focused on the following activities during its first two years of implementation:

Grades 1 - 3 Standards and Benchmarks

USG funds were used to develop and implement reading standards for Grades 1-3 namely: *Standards and Benchmarks: Supporting Reading Fluency in the Early Grades* to support the delivery of the curriculum and instruction. These reading standards clarify for teachers what students should be able to do as they move through each grade level and allow for comparability across classrooms. Benchmarks provide

teachers with formative guideposts, helping teachers to gauge student progress and inform their instructional planning. The use of standards and benchmarks has been critical in impacting teacher planning and performance. The reading standards and benchmarks were completed in September 2010 and later revised in February 2012. There is evidence that these tools are being utilized by project schools and some non-project schools. The Ministry of Education has strongly supported the use of standards and benchmarks for reading and these tools are available to schools in all regions via the project’s website.

Grades 1-3 Mathematics Scope and Sequence

The project developed a scope and sequence framework for Mathematics for grades 1-3. This tool supports classroom teachers and principals to manage the math curriculum. It maps content and clarifies for the classroom teacher, school administration, and parents the parameters (extent and depth) of content to be covered in a course or grade level within a specific timeframe. Curricular sequence provides teachers with the progression of curriculum. The development of a Scope and Sequence helps teachers to organize concepts to ensure that critical skills are covered.

Training Modules

USG also developed and implemented training modules to improve the teaching of reading and mathematics. The training modules focused on four groups:

Target group	Number trained
Trainers of Teachers (TOT)	50
Resource Teachers	539
Trainers of Principals	10
Principals	192

Trainers of Teachers (TOTs): 50 Trainers of Teachers were trained in the six educational regions, on the use of training modules to improve reading and mathematics in Grades 1 – 3. In support of JETP’s goal of strengthening the agencies of the Ministry of Education, the training of teachers and principals is done in collaboration with the Jamaica Teaching Council and the Regional Offices. Resource teachers should have returned to their schools and disseminated key lessons learned from the training, provide coaching, and acted as resources for other teachers during extended teacher planning sessions provided at project schools. Trainers of Teachers conducted training sessions with resource teachers across the regions in the 250 project schools. After 45 hours of training offered by JETP, Trainers of Teachers are eligible to apply to the Jamaica Teaching Council for certification.

Resource Teachers: Approximately two teachers per school were trained by 50 TOTs across the regions in the 250 project schools. Resource teachers were selected on recommendation by the principal and discussions with the responsible education officer in the region. It was expected that each resource teacher would attend approximately three (3) training sessions per subject area each year. The training records indicate that, on average teachers attended approximately six hours of training. Resource teachers were provided with copies of the training modules and were expected to train other

classroom teachers. These included strategies that illustrate different concepts and methodologies to support the reading and mathematics instruction.

These include:

- Reading standards for Grade 1-3
- Strategies for the effective teaching of reading
- Comprehension Parts and 1 and 2
- Response Booklet to Comprehension Part 1
- Early Reading Assessment Instrument Training Module
- Early Reading Assessment Checklist – A Tool for Continuous Assessment
- Training of Teachers in the Delivery of the Curriculum for Camp Summer Plus 2011

The Training in Mathematics included the following:

- Mathematics Scope and Sequence
- Using the Mathematics Window and the Three Lessons
- Lesson Planning, Measurement and Geometry
- Lesson Planning – Numbers, Algebra and Statistics
- Lesson Planning – Number Concepts including Addition and Subtraction
- Alternative Methods to teaching Basic Mathematics.

In October 2011, 54 projects schools (CBSI) were provided with Dell desktop computers and laptops and teachers and principals received 12 hours of training in technology integration into the reading and mathematics instruction and the use of the school management software.

Principals and School Administrators: The project's development hypothesis recognizes that capacity development through dynamic principal leadership is a key building block in providing teachers with the support for improved and more effective instructional practice. As part of this effort, 10 Trainers of Principals worked with 192 principals to improve leadership intervention strategies.

Participants at all training sessions are provided with modules of all presentations. The training of principals concentrated on the:

- Leadership: Management to Support the Reading Program.
- Leadership – Mathematics Leadership inclusive of Principals' Checklist for Principal's Walk- Through – What to look for on Principals' classroom visits.
- How student performance standards on the Early Reading Assessment Instrument informs leadership and instructional practice.
- Student Performance standards on the Early Mathematics Assessment Instrument informs leadership and instructional practice.

All training manuals are submitted to the Jamaica Teaching Council after they are reviewed and edited.

Regional Education Office Strengthening

The Project conducts regular meetings with each region through its regional director and the educational officers that supervise project schools. This collaboration is guided by a Memorandum of Understanding (MOU) which outlined and agreed on the responsibilities of the staff of the regional

offices with respect to the training of the selected resource teachers in the 250 project schools during Phase 2 of the training, as well as the training of Grades 1-3 teachers by resource teachers during Phase 3.

The MOU outlines the following responsibilities for education officers, the Jamaica Teaching Council and the advisors on the USAID/Jamaica Education Transformation Project with respect to the workshops in this phase.

Responsibilities:

The **regional education officer** is responsible for the following:

Before the Workshop

1. Liaise with the USAID/Jamaica Education Transformation Project regional advisor with respect to all aspects of the workshops to be presented to the resource teachers by the TOTs.
2. Select the TOTs who will be responsible for the training
3. Obtain permission for school-based TOTs to present at the workshop
4. Inform the principals of project schools of the planned workshops
5. Ensure that the principal is informed of the availability of workshop materials on the web. The name of the web site is: <http://www.jamaicaneducatorsshare.com>.
6. Obtain the names of the resource teachers (Mathematics and Reading) in project schools who will attend workshops (Names of the resource teachers to be sent by the principal to the regional education officer)
7. Determine the venues for the workshops for Reading and Mathematics in each region. Workshops may take place in QECs and will accord with the Jamaica Teaching Council's timetable for 2010- 2011. For each workshop, separate rooms will be provided – one for Mathematics and one for Reading. For each subject, (Mathematics or Reading), 5 contact hours of training per day will be provided.
8. Obtain from the Project regional advisors all materials (e.g. manuals, handouts) forms (e.g. evaluation forms) and certificates to be presented to the resource teachers
9. Make arrangements for reproduction of materials
10. Obtain claim forms for travel and for the TOTs' honorarium. (Claim forms for the honorarium may be obtained from the JTC or the project regional advisor. Travel claims are made on MOE travel claim forms)
11. Make arrangements for lunches for the resource teachers. In cases where lunch is not provided by the school, obtain a quotation from three providers and choose the most reasonable quotation
12. Prepare/obtain an invoice for lunches which will be presented to the project regional advisor for payment by the JTC.
13. Make all other preparations for conducting the workshops.

The project also participates in the monthly meetings held by the Deputy Chief Education Officer with responsibility for School Operations.

Online Forum

Online forums and materials have also been established on the website www.jamaicaneducatorsshare.com to provide further opportunities for school staff to share strategies that will strengthen students' performance and increase principals and senior teachers' leadership skills and accountability.

Reading and Math Assessment Tools

Tools for continuous assessment were developed so that teachers could administer the instruments to obtain results directly from the classroom. It was found that teachers often struggled to diagnose where students' were weak and the strengths that might be leveraged in the learning process.

Assessment Tool	Purpose	Context/history
Early Grade Reading Assessment (EGRA)	Tool to assist teachers to identify areas to focus phonetic-based instruction to improve student reading.	Originally proposed by USAID/Washington as a best practice tool for reading assessment developed in 2006.
Early Reading Assessment Instrument (ERAI)	To determine levels of performance in reading skills and in comprehension of reading passages.	Incorporates aspects of the Early Grade Reading Assessment (EGRA), but further developed to accommodate the Informal Reading Inventory (IRI) provided by the MOE to the Jamaica educational system. ERAI incorporates graded reading comprehension passages which are culturally relevant to the Jamaican context.
Early Reading Assessment Checklist (ERAC)	This was developed to provide a formative continuous method of assessments to schools	Based on the Standards and Benchmarks for each subject.
Early Grade Math Assessment (EGMA)	To determine the level of performance in number skills in grade 1-3 students	Originally proposed by USAID/Washington as a best practices tool for Math assessment, developed in 2006.
Early Mathematic Assessment Instrument (EMAI)	Determine levels of mathematics performance among students in Grades 1 and 2	Incorporates some aspects of the Early Grade Mathematics Instrument (EGMA), but further developed to match the requirements of the mathematics curriculum for Jamaican schools
Early Math Assessment Checklist (EMAC)	This was developed to provide a formative continuous method of assessments to schools	Based on the Standards and Benchmarks for each subject.

Resource Distribution

The following resources were distributed to CBSI schools:

- 54 Laptops
- 54 Computers
- 231 Mathematics carts
- 77 Sets of Jolly Phonics Series
- 77 sets Marilyn Burns Library

NB: Larger schools were provided with additional sets. Non-CBSI schools did not receive resources other than training.

JETP Achievements to Date

JETP exceeded the targets set for designing and implementing the reading and mathematics standards and in the training of teachers. However, the project has not seen the anticipated increase in the percentage of students reading at, or above grade level in grades one to three. The reading levels used as the baseline in Project Year 2010 were much higher than what obtained in Project Year 2011. An analysis of the results revealed that there were differences in the manner in which the data was collected in the two project years. The implementing partner has proposed that the Project Year 2011 data be used as the new baseline and has adjusted the strategy for implementation of activities.

III. TECHNICAL APPROACH

Understanding of Evaluation Tasks

The evaluation questions are stated in full in the Data Analysis Plan (Annex 1), but can be summarized as: To what degree are teachers (Question 1), principals and regional MOE offices (Question 2) implementing and supporting the JETP and why? Does the Jamaican education system have the capacity to implement the JETP in the way it was designed? (Question 3) Is there a difference in student reading performance between CBSI schools and non-CBSI schools? (Question 4) Did the second round of baseline data collection adequately address the weaknesses of the first, and if not, how can the JETP acquire reliable, accurate student performance data? (Question 5) These questions each require a unique strategy and separate set of data to answer, but their answers, when viewed together, should also provide a coherent picture of the JETP and a basis for future planning. These questions imply an extensive and complex evaluation, addressing issues of program planning, implementation and outcomes, organizational capacity, gender equity, and baseline data collection. SI proposes the following approach to meet these objectives and provide USAID/Jamaica with an accurate, comprehensive mid-term evaluation.

Evaluation Design and Proposed Methodological Approach

To address these questions, SI will utilize a range of quantitative and qualitative techniques, including existing data analysis, key informant interviews, focus group discussions, and participant observation. These methods will each target a different kind of data, but their results will be triangulated to produce more reliable and comprehensive findings than any single method in isolation. How gender affects the implementation and impact of the JETP is also a central theme of this mid-term evaluation, and SI will incorporate a gender component into each set of methods. Finally, throughout the course of the evaluation, SI will work closely with USAID and its partners to ensure that the methodology,

instruments and deliverables are tailored to the local context and organizational needs, while still maintaining the rigor and integrity required. A detailed explanation of the data collection and analysis plan can be found in Annex I, but a brief summary and description of the different methods is presented below.

Questions 1, 2 and 3: These questions will be addressed through a combination of **existing data analysis, interviews, focus groups** and **participant observations**, involving stakeholders from nation-level MOE staff to teachers at the local level. Given the range of factors that influence these actors' decisions, this integrated approach is the best strategy to capture a holistic picture of the current status of JETP implementation and explain why it is the way it is. Issues of gender will be explored in both the interviews and focus groups.

Question 4: SI will perform **existing data analysis** to determine whether there are significant differences between CBSI and non-CBSI schools. Results will be disaggregated by gender and other relevant variables to help triangulate the findings related to Questions 1, 2, 3 and 5.

Question 5: This question will require **existing data analysis** of the methodology, prior evaluations and resulting scores of the first two rounds of baseline data collection. The SI Team will also address this topic in **interviews** with those involved in the previous processes. Finally, the SI Team will examine whether these scores reveal any differences along gender lines.

Semi-structured Key Informant Interviews (SKII): SKIIs provide an opportunity for individuals knowledgeable about the program to share their experiences and opinions, helping to explain the reasons behind observed behaviors or trends in quantitative data. The SI Team will construct targeted interview guides in advance to ensure that all relevant topics are addressed and to allow for consistency and comparisons across interviews. At the same time, the interviewer will allow for enough flexibility to explore unanticipated but relevant lines of discussion. The SI Team will finalize the list of interviewees in consultation with USAID, but it will likely include, at the national and regional levels, key leaders and staff responsible for implementing the JETP, as well as representatives from the MOE and other education entities such as the National Education Inspectorate (NEI), and the Jamaican Teaching Council (JTC). Twelve trainers of teachers will be selected, two randomly selected from each region. The Trainers of Principals will be selected in a similar way, but with a total of six selected, with a stratified random sample ensuring at least one subject from each region. If the trainers did not have a region of focus, then a simple random sample from each group will be drawn. These SKIIs will take place either in the capital or at the regional offices. As part of the school visits, the SI Team will conduct SKIIs with the principal, two resource teachers, and one or two other teachers in each school.

Focus Group Discussion (FGD): By bringing together a small group of individuals, asking targeted questions and facilitating a conversation, the researcher is able to collect input from more stakeholders than an individual interview in the same amount of time. For this reason, it is especially suited to collecting data from the teachers in program schools who are not resource teachers, increasing the proportion of affected teachers included in the mid-term evaluation. It also allows for the interplay and synthesis of ideas, as participants react and respond to each other's comments. Up to eight participants will be randomly selected from among the teachers who are present on the day of the school visit, not including the resource teachers. If fewer than eight teachers are present, all of them will be asked to participate.

Existing Data Analysis: A large amount of data and documentation related to the JETP already exists and should be used to inform the current evaluation. Doing so is both an efficient use of resources and crucial in order to gain a comprehensive understanding of the program at its midpoint. Three main types of data will be reviewed and analyzed in the course of this study:

- **Current 2nd grade reading scores from JETP schools.** These scores will be disaggregated by gender, school, region, CBSI status and any other relevant explanatory variables included in the data set. The statistical analysis techniques will be finalized after receiving the data, but will likely include regression modeling controlling for fixed effects at the school level.
- **JETP-specific program documents.** In order to understand the background, progress and potential of JETP, the SI Team will need to carefully review the materials which describe its initial design and planning, its current systems and their operations, and all evaluations or assessments of the program that have occurred up to this point. Records and results of the first two rounds of baseline data collection will also be reviewed in order answer Question 5.
- **Organizational documents from the MOE and other education bodies.** In order to assess the organizational capacity of the MOE and other entities working to improve the education of Jamaica's youth, the SI Team will also need to review materials describing the planning and operations of these groups, the relationships among them, and especially the human, financial and infrastructural resources available to them and how they have used them to the support the transformation of Jamaica's education system.

Participant Observation: Observing teachers teaching likely provides the most accurate picture possible of the degree to which the techniques included in the JETP training are actually being implemented in the classroom. The SI Team will design a participant observation guide to be used during every observation to ensure that the most pertinent factors are noted and recorded in a consistent and easily comparable way. One team member will devote one full morning to classroom observation, allowing approximately four separate observations of approximately one hour in length. Of these, two will be of resource teachers and two of other classroom teachers, randomly selected among those present on the day of the visit.

Organizational Assessment: The JETP relies on a chain of individuals and organizations to transfer new skills from the national level to the regional and then to the local level, and its success depends on the capacity of these individuals and organizations to accomplish this goal. A comprehensive organizational assessment of the Jamaican education system falls outside the scope of this evaluation, but the SI Team will utilize components of this method, focusing on the specific question of whether the MOE and its affiliated bodies have the capacity to implement the JETP as it was designed. They will pay particular attention to the organizational structure of the education system and the relationships among its parts, including how decisions are made and communicated and how tasks are delegated and those responsible held accountable. The team will also assess the amount of resources committed to the JETP, including human resources (number and skill level of staff), physical resources (office space, technology, materials) and financial resources (budgetary allocations over the course of the project). This data will be collected primarily through a review of the relevant documents and SKiIs with stakeholders from all levels of the education system. To the degree possible, the SI Team will also look for correlations between education system capacity and student performance data.

Case Study: The SI Team will conduct four case studies in JETP schools. The case study schools will be selected in consultation with USAID and JETP staff, but will include one of each type:

- 1) High-performing CBSI school
- 2) Low-performing CBSI school
- 3) High-performing non-CBSI school
- 4) Low-performing non-CBSI school

One SI team member will conduct the case studies of the two CBSI schools, and another team member will conduct the case studies of the non-CBSI schools. They will spend one additional day at each school selected in order to provide additional time to speak with the principal and teachers, perform classroom observations, and review relevant documents. The SI Team member conducting data collection at the case study school will also carry out interviews at the regional MOE office responsible for supporting that school. In this way, this person will gain a coherent picture of the JETP as it operates from the national to the regional to the local level in each of these four schools, allowing for the most detailed and comprehensive case study possible.

Evaluation Plan

Phase 1

The SI Team will spend the first two weeks of the project reviewing relevant documents provided by USAID and the JETP staff and planning the remainder of the study. As referenced in the Request For Task Order Proposal (RFTOP), the original planning documents, Country Assistance Strategy, Performance Management Plan, quarterly and annual reports, portfolio reviews, gender report, sample assessment instruments, and other materials will all be available and reviewed prior to arrival. This will give the team the best understanding of the history of the project and where it stands today and will enable them to tailor the methodology and data collection tools to the current needs of the project. It will also enhance their ability to interpret the data they collect during Phase 2. The SI Team will also conduct a preliminary analysis of the 2nd grade reading scores from JETP schools, allowing them identify differences between CBSI and non-CBSI schools, as well as any general trends to be explored in greater detail during the field visit. The SI Team will also use this information in the final selection of schools for school visits and for case studies. In addition, the SI Team will review the documentation on the first and second rounds of baseline data collection. The SKII, FGD and participant observation guides will also be constructed during this time, with the assistance of an additional evaluation specialist with experience in the education field. After this first week, the SI Team will hold a preliminary briefing with USAID via teleconference to present a detailed workplan and draft instruments. Finally, before leaving for Jamaica, the SI Team will finalize all data collection tools and the evaluation methodology in consultation with USAID and other local stakeholders.

Phase 2

The SI Team will travel to Jamaica where they will meet first with USAID and other relevant stakeholders to finalize the workplan, travel schedule and the data collection instruments. They will spend one day in the Kingston area field testing these tools and ensuring that their interview, focus group and observation methods are consistent across all team members. The team will spend one additional day in the capital, meeting with MOE and JETP staff to review additional materials and conducting SKIIs with representatives at the national level. After that, they will split into three travel

sub-units to begin visiting schools. The four core team members will be supplemented by two local skilled data collection subcontractors with experience in the education sector in Jamaica. One will be paired with the Team Leader and the other with the Evaluation Specialist, and the two Instructional Reading Specialists will also form a sub-unit of two. In this way, each sub-unit will include one person with local experience, which will likely aid the team in establishing rapport in local schools, leading to overall higher quality data. Each school visit will include a review of relevant documents, classroom observations of both resource teachers and teachers who have not been trained as resource teachers, as well as a SKII with the school principal and one with each resource teacher. It will also include an FGD with a randomly selected group of non-resource teachers. If time permits, the evaluators may also select one or two FGD participants, based on their comments during the FGD, with whom to conduct a SKII. The combination of these data collection methods will provide a holistic understanding of the implementation of the JETP from the perspectives of a broad range of stakeholders in each school. Forming three sub-units of two evaluators and allocating two person-days of time to each school allows for the greatest amount of data to be efficiently collected from the greatest number of schools given the time constraints and the realities of field travel. In addition to school visits, the SI Team will also visit the six regional offices of the MOE to review relevant documents and conduct SKIIs with representatives of the MOE and other affiliated education entities. On these days, the SI Team will also schedule SKIIs with two randomly selected Trainers of Teachers and one randomly chosen Trainer of Principals who have served in that region. The SKIIs with these trainers will focus on their experiences as intermediaries between the MOE and the local schools. The data collected at the regional level will help illuminate the causal chain between the national and local levels and determine whether it is functioning as envisioned. Midway through these field visits, the Team Leader will send USAID a brief summary of the progress and preliminary findings to that point. At the conclusion of the school and regional office visits, the SI Team will converge again in the capital to conduct an additional day of data collection at the MOE and JETP national offices. Prior to this time, they will be able to revise their SKII guides and requests for materials to reflect the added insight gained from their school and regional visits, delving deeper into the “how” and “why” of the evaluation questions and filling in any remaining gaps in their picture of the JETP. On the final day, they will meet again with USAID and high-level JETP staff to present their preliminary findings and receive feedback which will then be incorporated into the final report.

Phase 3

During Phase 3 of the evaluation, the SI Team will first code the results of the SKIIs, FGDs and participant observation in a consistent and coherent manner, allowing them to compare responses and identify common themes and trends. The findings from the document review will also be distilled and combined with those from the qualitative methods. Similarly, any trends which emerged from the analysis of the 2nd grade reading scores will also be compared to the other findings as appropriate. Team members will maintain constant communication throughout this period, allowing them to triangulate their findings and synthesize the results of separate data collection methods into a coherent summary of the operations and effects of the JETP. Based on all of these findings, the SI Team will then draft specific, actionable recommendations for USAID and their partners on this project. These findings and recommendations will be presented to USAID in preliminary form during a teleconference, and they will have an opportunity to provide feedback at this time. Based on this feedback, the SI Team will then make any necessary changes to the report document and submit it to USAID in its final form.

Technical Notes

School selection: The three travel sub-units will visit approximately twenty-one schools over eight days. The list and schedule will be finalized in consultation with USAID, but will include a proportional

number from each region. The team will seek to oversample from among the schools receiving support from the CBSI, as they otherwise make up only about one fifth of the total number of JETP schools. The SI Team will also select schools to ensure a representative sample based on other variables which may affect the success of the JETP, including level of poverty, infrastructure and whether it has an urban or rural location.

Quantitative Data Analysis: In order to determine whether the additional support to CBSI schools is correlated with a difference in 2nd grade reading scores, the SI Team will construct a regression model including a dummy variable for participation in the CBSI and as many relevant student-level characteristics (sex, age, race or ethnicity, language spoken at home, attendance, history of retention) as are included in the data set, as well as relevant school-level variables (size, whether primary, primary and junior high, or all-age, proportion of disadvantaged students) and community-level variables (poverty rate, whether urban or rural) that can be accessed from the JETP, the MOE and Statistical Institute of Jamaica (STATIN). If the data set provided by JETP contains only reading scores from second grade students in 2012, then the SI Team will include all of these students from all of the JETP schools in the analysis.²⁸ Also, in addition to the critical review of the methodologies of the two rounds of baseline data collection, the SI Team will analyze the quantitative data produced by these processes. They will attempt to identify any irregularities which would help determine whether these results are accurate and a reasonable basis for comparison as the JETP moves forward.

²⁸ Given the numbers of students (30,000) and schools (250) cited in the RFTOP, the SI Team estimates there to be approximately 10,000 2nd grade student beneficiaries in 2012, with approximately 40 2nd grade students in each school. If JETP is able to provide additional data sets from other grades and other years, and USAID would like to include these data sets in the analysis, then a sampling methodology would be employed to reduce the total number of students included in the analysis, while still ensuring that the sample was representative of the total population.

APPENDIX II: MEMORANDUM OF UNDERSTANDING

USAID/Jamaica Basic Education Project and Ministry of Education

BACKGROUND

One of the aims of the USAID/Jamaica Basic Education Project is the improvement of reading fluency and foundation mathematics skills in grades 1-3 of 250 primary level schools in Jamaica. To achieve this end, the Grades 1-3 teachers in the 250 primary schools of the project will receive training in the teaching of Mathematics and Reading in order to upgrade their knowledge and skills in the teaching of these two subjects. In addition principals will receive training in leadership and school improvement practices.

The USAID/Jamaica Basic Education Project has developed a 3-phase training model for the presentation of workshops (see Model outlined on page 2). The first phase is devoted to the training of the Trainers of Teachers (TOTs) in order to prepare these TOTs to upgrade the Grades 1-3 teachers. Workshops will be presented to the TOTs by the Project advisors of the USAID/Jamaica Basic Education Project in reading fluency and foundation mathematics skills. In Phase II, these TOTs will train Grades 1-3 resource teachers in the 250 project schools in reading fluency and foundation mathematics skills. In Phase III, the resource teachers trained in Phase II will share the content and strategies learned in the Phase II workshops with the other teachers in Grades 1-3 and with other Grades 1-3 teachers in nearby non-project schools.

The Project has prepared a Terms of Reference with the Jamaica Teaching Council (JTC) for year 2010 to 2011 for the presentation of the workshops to the TOTs during Phase I, and the presentation of the workshops by the TOTs to the resource teachers during Phase II.

The purpose of this Memorandum of Understanding (MOU) is to outline and agree on the responsibilities of the staff of the regional offices with respect to the training of the selected resource teachers in the 250 Project schools during Phase II of the training, as well as the training of Grades 1-3 teachers by resource teachers during Phase III. This MOU will also outline the responsibilities of the project regional advisors during Phases II and III.

TRAINING MODEL

The following is the Training Model adopted by the Project.

Training Model

Phase I

USAID/JABEP project advisors

Trains Trainers of teachers (TOTs) and Education Officers

Education Officers in each region
Organize training by TOTs for resource teachers in 250 project schools

Phase II

Trainers of Teachers (TOTs)
train Resource Teachers (Maths and Reading)
in 250 Project schools
(minimum 5 hours of training per term for each Resource Teacher)

Education Officers in each region
Liaise with schools to organize training by Resource teachers
Of Grades 1-3 teachers in 250 project schools

Phase III

Resource teachers in project schools
train Grades 1-3 teachers in 250 project schools and other primary schools
(minimum 5 hours of training per term for each teacher)

Presented below are:

- A) Phase I. Description of the workshops for the Teaching of Reading and Mathematics Skills presented to TOTs,
- B) Phase II Description of the workshops for the Teaching of Reading and Mathematics Skills presented by the TOTs to resource teachers, as well as the responsibilities of education officers, the Jamaica Teaching Council and the advisors on the USAID/Jamaica Basic Education Project with respect to the workshops in Phase II.
- C) Phase III Description of the workshops to be presented to Grades 1-3 teachers by resource teachers, and the responsibilities of the regional education officer in Phase III.

A) Phase I

- i) Description of the workshops**

Trainer of Teachers (TOT) Workshops:

- a. A two-day workshop – *A Practical Approach to the Teaching of Mathematics at the Early Grades* - July 21 – 23, 2010
- b. A two-day workshop - *Reading Standards for Grades 1-3 and Strategies for the Effective Teaching of Reading* – September 23, and October 12, 2010
- c. Additional workshops designed for the Trainers of Teachers (TOTs) will be presented during Term 2 and Term 3, 2010-2011.

Additional workshops will be added as necessary.

B) Phase II

i) Description of the workshops

The workshops in Phase 2 are designed for the training of resource teachers in the 250 project schools and will be presented by the TOTs who were trained during Phase I. The content of these workshops is similar to the content of the workshops presented during Phase I. The dates of these workshops will be as determined by the Jamaica Teaching Council. The locations of these workshops will be determined by the regional education officers. These workshops will take place in QECs as determined by the regional education officers and in accordance with the Jamaica Teaching Council's timetable for 2010- 2011.

The following are the responsibilities of education officers, the Jamaica Teaching Council and the advisors on the USAID/Jamaica Basic Education Project with respect to the workshops in this phase.

ii) Responsibilities

The **regional education officer** is responsible for the following:

Before the Workshop

14. Liaise with the USAID/Jamaica Basic Education Project regional advisor with respect to all aspects of the workshops to be presented to the resource teachers by the TOTs.
15. Select the TOTs who will be responsible for the training
16. Obtain permission for school-based TOTs to present at the workshop
17. Inform the principals of project schools of the planned workshops
18. Ensure that the principal is informed of the availability of workshop materials on the web. The name of the web site is: <http://www.jamaicaneducatorsshare.com>. (Please see note at the bottom of page 6 for instructions to access materials).
19. Obtain the names of the resource teachers (Mathematics and Reading) in project schools who will attend workshops (Names of the resource teachers to be sent by the principal to the regional education officer)
20. Determine the venues for the workshops for Reading and Mathematics in each region. Workshops may take place in QECs and will accord with the Jamaica Teaching Council's timetable for 2010- 2011. For each workshop, separate rooms will be provided – one for Mathematics and one for Reading. **For each subject, (Mathematics or Reading), 5 contact hours of training per day will be provided.**

21. Obtain from the Project regional advisors all materials (e.g. manuals, handouts) forms (e.g. evaluation forms) and certificates to be presented to the resource teachers
22. Make arrangements for reproduction of materials
23. Obtain claim forms for travel and for the TOTs' honorarium. (Claim forms for the honorarium may be obtained from the JTC or the project regional advisor. Travel claims are made on MOE travel claim forms)
24. Make arrangements for lunches for the resource teachers. In cases where lunch is not provided by the school, obtain a quotation from three providers and choose the most reasonable quotation
25. Prepare/obtain an invoice for lunches which will be presented to the project regional advisor for payment by the JTC.
26. Make all other preparations for conducting the workshops.

During and/or after the workshop

The education officer is responsible for the following:

27. Monitor all workshops.
28. Ensure completion of the attendance register for the Mathematics and Reading workshops.
29. Forward the attendance register of the workshop to the Project regional advisor
30. Liaise with the Project regional advisor regarding training of resource teachers who were absent (e.g. by attending another workshop where this is possible)
31. Obtain completed claims for honorarium and travel from the TOTs, certify the claim form for the honorarium, and forward these claim forms (for honorarium and travel) to the project regional advisor
32. Present invoices for lunches of the resource teachers to the regional Project regional advisor for presentation to the Jamaica Teaching Council
33. Make arrangements for the reimbursement for lunches.

The Jamaica Teaching Council is responsible for:

- travel costs incurred by the TOTs as well as the payment of an honorarium to the TOTs.
- lunches for each resource teacher

The Project regional advisors are responsible for the following:

- Ensure that the regional education officer receives all materials and handouts for the workshop in time for reproduction
- Obtain all completed travel and honorarium claim forms from the regional education officer, initial and forward to the JTC for payment.
- Liaise with the regional education officer on the progress of all training and follow up activities.

C) Phase III

i) Description of the workshops

These workshops are presented by the resource teachers who were taught during Phase II and are school based. The content of these workshops is similar to the content of the workshops presented

during Phase I. The participants will normally be the Grades 1-3 teachers at the school as well as Grades 1-3 teachers from other non-project primary schools. The principal of the school is responsible for organizing all aspects of these workshops.

ii) Responsibilities

The regional education officer is responsible for the following:

1. Liaise with the principal in each school to determine the dates of the training to be provided in each subject (Reading and Mathematics)
2. Ensure that the principal in each school is informed of the availability of workshop materials on the web. The name of the web site is: <http://www.jamaicaneducatorsshare.com>. (Please see note at the bottom of page 6 for instructions to access materials)
3. Obtain from the principal attendance registers of teachers who attended workshops (Mathematics and Reading)
4. Submit registers of attendance to the Project regional advisor
5. Liaise with the Project regional advisor regarding training of the teachers who were absent (e.g. by attending another workshop where this is possible)
6. Liaise with the principal of each school regarding the follow-up monitoring of teachers trained at the school.
7. Monitor the quality of teaching of the teachers trained during Phases II and III and the extent to which teaching adheres to the guidelines and principles presented at the workshops
8. Liaise with the principal of each school regarding the procedures established to ensure continued teacher development in the areas of Reading and Mathematics at grades 1-3.

Note

Instructions to access course materials

1. Go to www.jamaicaneducatorsshare.com
2. Go to Course Categories
3. Click on **Literacy Trainers Forum**
4. You will be directed to the Login page; click on **Login as guest**
5. The enrolment key is **trainer**.
6. Contact the Literacy/ IT advisor at melody.williams@gmail.com so that an account can be created for you. This is a part of our Internet security measures.

APPENDIX III: TERMS OF REFERENCE

USAID/Jamaica Basic Education Project and Jamaica Teaching Council

BACKGROUND

One of the aims of the USAID/Jamaica Basic Education Project is to improve reading fluency and foundation mathematics skills in Grades 1-3 of 250 primary level schools in Jamaica. The Project has adopted an operational model whereby Project Advisors present workshops to Trainers of Trainers (TOTs) in order to prepare them to upgrade teachers in the knowledge and skills necessary to achieve these project goals and reduce competency gaps. Workshops will be presented to the Trainers of Trainers (TOTs) in the first instance followed by the presentation of workshops to the Resource Teachers by the TOTs. These Resource Teachers are expected to cascade this training to other Grade 1-3 teachers in their schools.

In deciding on a training programme for the teachers, and in keeping with the spirit of the contract which requires collaboration and joint consultation, the Project Advisors met with various stakeholders and representatives of the Ministry of Education in order to determine problems/deficiencies or areas to be addressed in the training. From these discussions and from a Needs Assessment/School Profile questionnaire administered to the schools, the Project identified needs of the schools and teachers, and also some problems in the teaching of reading fluency and foundation mathematics skills identified by various stakeholders. These needs and problems together with the requirements of the contract formed the basis of the needs addressed in the training programme.

The Project has prepared a training plan for the training of the TOTs in reading fluency and foundation mathematics skills which are presented below.

Description, Dates and Venue

This description applies only to workshops to be presented in the Trainer of Trainers (TOTs) for September – 2010 to August 2011. The training will be presented in two phases. Phase 1 will be devoted to the training of the TOTs, while Phase 2 will focus on the training of Resource Teachers by the TOTs.

Phase 1

Trainer of Trainers Workshops to date

- a) A two-day workshop – *A Practical Approach to the Teaching of Mathematics at the Early Grades* - July 21 – 23, 2010
- b) A two-day workshop - *Reading Standards for Grades 1-3 and Strategies for the Effective Teaching of Reading* – September 23, and October 12, 2010

Phase 2

The workshops in Phase 2 will be for the training of the Resource Teachers in the 250 project schools and will be presented by the TOTs. The education officers in the six regions will be responsible for organizing the venues and teacher participants for these workshops in this second phase. These workshops will take place in accordance with the Jamaica Teaching Council's timetable for 2010. The location of these workshops will take place in QEC's or school clusters as determined by the regional education officers.

Target Group/Participants

Phase 1

The participants at these workshops in Phase 1 will be Reading Specialists, Mathematics Specialists, Literacy Resource Teachers, Mathematics Resource Teachers and Education Officers from the six regions. The Trainer of Trainers will be certified by the USAID/Jamaica Basic Education Project after successfully completing 45 hours of training before being recommended for certification by the Jamaica Teaching Council. The education officers have been invited to these workshops not to prepare them to be TOTs but to acquaint them with the content of the training since they will have to coordinate the presentation of these workshops to the Resource Teachers.

Training Manuals will be submitted to the Jamaica Teaching Council after they are reviewed and edited.

Phase 2

The participants in the second phase will be the Grades 1-3 teachers in the 250 project schools. The principals of project schools have been asked to identify a teacher for each subject area in grades 1-3 who will be willing to be trained to support improvements in instructional delivery in the reading fluency and foundation mathematics skills respectively. These Resource Teachers are expected to share content and strategies garnered at training sessions with TOTs with the other teachers in grades 1-3 at their school.

Purpose and Expected Outcomes

Phase 1

The purpose of these Trainer of Trainers (TOTs) Workshops is to prepare them with the necessary knowledge and skills which are needed to upgrade grades 1-3 teachers in project schools in reading fluency and foundation mathematics skills to improve performance standards in these subject areas.

At the end of these workshops it is expected that the TOTs will be able to present the principles of and approaches to teaching reading fluency and foundation mathematics skills as well as other content areas to teachers in the project schools.

Phase 2

The purpose of the workshops in the second phase is to upgrade the teacher representatives from the 250 project schools in the knowledge and skills of the teaching of reading fluency and foundation mathematics skills in the early grades. The knowledge and skills gained will enable the teachers to improve the reading fluency and foundation mathematics skills of their students. At the end of these workshops it is expected that these teacher representatives will be able to upgrade their colleagues at the school with the support of the regional officers. Teachers are expected to complete 5 hours training per term. Training sessions may be scheduled over the span of the term to meet this requirement. Registers must be completed and submitted to verify compliance.

Aims of the TOT Workshop

Phase 1

To prepare trainers to facilitate the training of teachers in the area of regular reading fluency instruction and foundation mathematic skills as well as remedial reading instruction

Objectives of the Workshop

At the end of the two-day training, Trainers of Trainers (TOTs) should be able to effectively and efficiently deliver reading fluency and foundation mathematics skills to Resource Teachers in grades 1-3.

Selected topics covered in workshops

<u>Reading Fluency</u>	<u>Foundation Mathematics Skills</u>
<ol style="list-style-type: none"> 1. Definition of reading 2. Introduction to Reading Standards 3. Articulation between Standards and Curriculum 4. Psychology of the Reader <i>Psychosocial reading environment</i> 5. Psychology of Teaching Adults 6. Phonological /Phonemic Awareness Strategies <i>Activities for Teaching Phonological Awareness</i> 7. Word Identification Strategies (Grade 1- 3 and remedial) 	<ol style="list-style-type: none"> 1. Uses of the Mathematics Window, Scope and sequence of Mathematics for Grades 1,2,3 2. Fundamentals of the Content and Process Strands 3. How Children Learn Mathematics- Learning Styles, Strategies and Methodologies 4. Mathematics Tools – Common Planning Time, Standards and Benchmarks and Lesson Study/Modeling 5. Implementing Mathematics Clubs, Family Mathematics, Competitions and Mathematics Festivals.

Phase 2

The Objectives and Topics for Phase 2 will be determined by the Project Advisors in collaboration with the TOTs and regional education officers. The focus in this phase of the training will be on the skills and knowledge for teaching reading fluency and foundation mathematics skills in the early grades.

Training approaches

The presenters of the workshop will use active adult learning approaches as a way of modeling some of strategies recommended in the module. These include active participatory teaching methods as advocated by the MOE in their vision of teaching. Presenters will recognize the experiences of the participants and use their experience as a basis for the workshop.

Presenters

The presenters are the Literacy and Mathematics Advisors of the USAID/Jamaica Basic Education Project and include the following:

Reading Fluency

Dr. Jossette Smikle
 Dr. Maureen Byfield
 Dr. Melody Williams
 Mrs. Jennifer Silvera
 Mrs. Novelette McLean Francis

Foundation Mathematics Skills

Mr. David Morgan
 Mrs. Lorna P. Thompson
 Miss Andrea Pinnock
 Mr. Derrick Hall

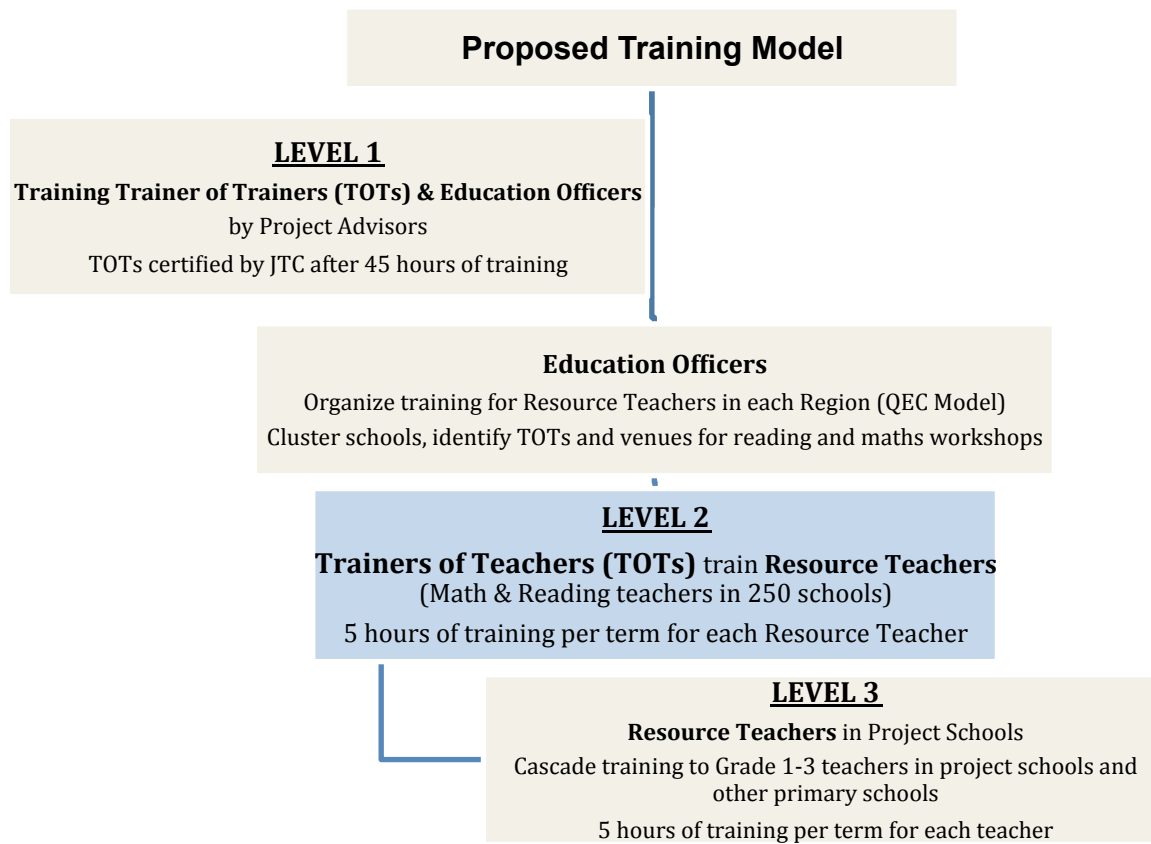
Regional Profile of Project Schools

This table shows the number of teachers and the number of TOTs required

REGION	# of Schools	MATHEMATICS			READING		
		Resource Teachers to be trained	Venues needed	TOTs needed	Resource Teachers to be trained	Venues needed	TOTs needed
1	30	45	2	2	45	2	2
2	48	52	3	3	52	3	3
3	24	26	1	1	26	1	1
4	41	46	2	2	46	2	2
5	39	46	2	2	46	2	2
6	68	102	4	4	102	4	4
Total	250	331	14	14	331	14	14

PROPOSED TRAINING MODEL

The following is the Training Model adopted by the Project.



Proposed Training Timetables 2010-2011

MATHEMATICS TRAINING PLAN 2010 – 2011

For queries contact **David Morgan, Mathematics Advisor**, as above or at 341-2599 and e-mail: davidmorgan48@gmail.com

Phase I Training: Training of Trainers of Teachers (TOTs) by Project Staff

Date	Trainers	Recipients	Venue	Length	Topic(s)
July 2010	Project Maths Team (4 Members)	68 Trainers of Teachers (TOTs) and 12 Education Officers	1 central venue	2 days	Use of Windows Curriculum: Scope and Sequence 3-part lesson plan
January/ February 2011	Project Maths Team (4 Members)	68 Trainers of Teachers and 12 Education Officers	3 separate venues to minimize travel requirements	1 day	The Fundamentals of Number: representation (For Phase 2 delivery in March)
March 2011	Project Maths Team (4 Members)	68 Trainers of Teachers /Principals and 12 Education Officers	3 separate venues to minimize travel requirements	1 day	Content for leadership to be determined (for Phase 2 delivery in April)
April 2011	Project Maths Team (4 Members)	Trainers of teachers	3 to minimize travel requirements	1 day	Strategies and techniques for teaching Mathematics (for Phase 2 delivery in April)

Phase 2 Training: Training of Resource Teachers and Principals by Trainers of Teachers (TOTs)

Date	Trainers	Recipients	Venue	Length	Topic(s)
October 14 or 15, or November 15 or 16	Trainers of teachers	Approximately 300 School maths resource teachers	As determined by REE's	1 day	Use of Windows Curriculum: Scope and Sequence 3-part lesson plan
March 10 or 11, 2011	Trainers of teachers	Approximately 300 School maths resource	As determined by REE's	1 day	The Fundamentals of number Representation
April 28 or 29, 2011	Trainers of teachers/ principals	Approximately 300 School principals/vice principals	As determined by REE's	1 day	Content to be determined
April 28 or 29, 2011	Trainers of teachers	Approximately 300 School maths resource teachers	As determined by REE's	1 day	Strategies and techniques for teaching mathematics

These dates are set in accordance with the JTC Training Time Table

READING TRAINING PLAN 2010- 2011

For queries contact Dr. Maureen Byfield, Reading Advisor, as above or at 842-0532 and e-mail: maureenbyfield@yahoo.com

Phase I Training: Training of Trainers of Teachers (TOTs) by Project Staff

Date	Trainers	Recipients	Venue	Length	Topic(s)
September 23, 2010. October 12, 2010	Project Reading Team (5 Members)	50 TOTs and 12 Education Officers	Kingston-Caenwood Auditorium	2 days	Standards and Effective Literacy Instruction: Introduction to Standards and effective literacy instruction:
January 18-21 2011	Project Reading Team (5 Members)	50 TOTs and 12 Education Officers	Kingston & Mandeville	1 day	Leadership Training: Management Structures to Support Literacy Programmes.
February 23-25, 2011	Project Reading Team (5 Members)	50 TOTs, 12 EOs	St. Ann & Kingston	2 days	Classroom Applications for Reading Fluency and Comprehension: Grade level reading instruction for 1 st – 3 rd grade teachers (inclusive of technology training and Grade 3 remedial instruction):

Phase 2 Training: Training of Resource Teachers and Principals by Trainers of Teachers (TOTs)

Date	Trainers	Recipients	Venue	Length	Topic(s)
October 14 and 15, 2010 or November 15 and 16	Trainers of teachers	Approximately 300 Reading resource teachers	As determined by REE's	2 days	Standards and Effective literacy Instruction: Introduction to Standards and Effective Literacy Instruction
March 10 or 11, 2011	Trainers of teachers	Approximately 300 Reading resource	As determined by REE's	1 day	Classroom Applications for Reading Fluency and Comprehension: Grade Level Reading Instruction
April 28 or 29, 2011	Trainers of teachers/ principals	Approximately 300 School principals/vice principals and senior teachers	As determined by REE's	1 day	Content to be determined
April 28 or 29, 2011	Trainers of teachers	Approximately 300 Reading resource teachers	As determined by REE's	1 day	Classroom Applications for Reading Fluency and Comprehension: Grade Level Reading Instruction

These dates are set in accordance with the JTC Training Time Table

GENERAL LEADERSHIP TRAINING PLAN 2010- 2011

For queries contact Dr. Cecile Walden, IR 4 Consultant, as above or at 361-3334 and e-mail: cecilewalden@yahoo.com

Phase I Training of Trainers of Teachers/Principals (TOTs)

Date	Trainers	Recipients	Venue	Length	Topic(s)
February	Project Staff	Approximately 18 TOTs	Caenwood Auditorium	2 days	Content to be determined
July	Project Staff	Approximately 18 TOTs	Caenwood Auditorium	2 days	Content to be determined

Phase 2 Training of Trainers of Teachers/Principals (TOTs)

Date	Trainers	Recipients	Venue	Length	Topic(s)
March 10, 11 2011	Trainers of Teachers/ principals	Approximately 600 principals, vice principals and senior teachers	To be determined	2 days	Content to be determined
July, 2011	Trainers of Teachers/ principals	Approximately 600 principals, vice principals and senior teachers	To be determined	2 days	Content to be determined

NB This timetable reflects training dates in accordance with the JTC Training Time Table.

Budget

Phase 1

The Jamaica Teaching Council will not incur any costs associated with the Trainer of Trainers (TOT) workshops during the first phase.

The USAID/Jamaica Basic Education Project will cover the following costs:

1. Training of Trainers (TOTs)
2. Preparing and reproducing training materials for TOTs workshops
3. Identify training venues for TOT training
4. Provide meals for TOT training
5. Provide each Region with USAID/Jamaica Basic Education Project Banner
6. Training Manuals will be submitted to the Jamaica Teaching Council and posted on the project's website after they are reviewed and edited.

Phase 2

Costs to JTC

The Jamaica Teaching Council will incur the following costs during the second phase of training when Resource Teachers are trained by the TOTs:

- Reproduction of training materials
- Travel for teachers
- Travel for the Trainers of Teachers
- Costs for Lunch and Refreshments
- Honorarium for TOTs

USAID/Jamaica Basic Education Project - Phase 2 Training
Trainers of Teachers and Principals - Workshops 2010 - 2011

Date	Component	Workshop topics	No. of trainers	No. of hours	Stipend	Participants	Lunch	Travel
Oct. 14 or 15 Nov. 15 or 16	Math	Use of Windows, Curriculum: Scope and Sequence, 3-part lesson plan	12	5	120,000	400	120,000	
Oct. 14 or 15 Nov. 15 or 16	Reading	Standards and Effective Literacy Instruction	12	10	240,000	400	240,000	
March 10 or 11	Math	The fundamentals of Number – Representation	12	5	120,000	400	120,000	
March 10 or 11	Reading	Classroom Applications for Reading Fluency and Comprehension: Grade level reading instruction for teachers of Grades 1-3 and Grade 3 remedial instruction)	12	5	120,000	400	120,000	
March 10 and 11	Leadership	Topics to be determined	12	10	240,000	600	360,000	
April 28 or 29	Reading / Leadership	Leadership Training : Management Structures to support literacy programme (1 day)	12	5	120,000	400	120,000	
April 28 or 29	Reading	Classroom Applications for Reading Fluency and Comprehension: Grade level reading instruction	12	5	120,000	400	120,000	

		for teachers of grades 1-3 and Grade 3 remedial instruction)						
April 28 or 29	Math / Leadership	Leadership Training : Management Structures to support mathematics programme (1 day)	12	5	120,000	400	120,000	
April 28 or 29	Math	Strategies and techniques for teaching Mathematics	12	5	120,000	400	120,000	
July	Leadership	Leadership Training - School Effectiveness Management	12	10	240,000	600	360,000	
		SUB - TOTAL			1,560,000		1,800,000	
		TOTAL					3,360,000	

Certificate of Participation and Evaluation

All participants will be able to evaluate the quality and relevance of the workshops presented for the TOTs. The completed feedback forms will be compiled and a report prepared. This report will inform future training.

All participants will be presented with a Certificate of Participation by the USAID/Jamaica Basic Education Project indicating the number of hours of training received.

APPENDIX IV: METHODOLOGY

The evaluation employed a combination of quantitative and qualitative techniques including classroom observations, key informant interviews, group interviews, and analysis of secondary data and documents. Data was therefore generated at the school level, at the regional level of the Ministry of Education administration, and at the policy level of the Ministry. These data are summative in that they provide a description of the context, inputs, and processes involved in the Project's planning and implementation, the organizational capacity of the Ministry of Education, and the Project's outcomes. The data are also formative in that they triangulate the contextual factors that have influenced the Project's implementation in order to assess future directions for the Project.

The evaluation approach was built by triangulating data from direct classroom observations and interviews with resource teachers trained by the Project staff, classroom teachers trained by these resource teachers, principals, regional education officers, Project staff, and Ministry of Education officials at the strategic and policy levels. In this way, the evaluation provides a comprehensive review of the implementation strategy and the linkages between the Project and various parts of the Jamaican education system.

At the school level, evaluators focused on the results of training that principals and teachers received from Project staff. For principals, the team sought to determine the effects of training on leadership and management support of the reading program, and the use of early reading assessment to inform leadership and instructional practice. In terms of teacher training, the evaluators focused on implementation of strategies for effective teaching of reading and comprehension.

At the regional and national levels, group interviews were conducted with education officers, senior education officers, and regional directors. The interviews were focused on determining the extent of the regions' support for the implementation of the Project in schools, and specifically, how the regions are organized and resourced to provide such support, including the role of the education officers. These interviews were semi-structured, so that the evaluators facilitated open conversations in such a way that participants could raise additional issues. In this way, respondents were able to talk about the issues in the way they experienced and understood them. The interviews therefore revealed several contextual issues related to the implementation of the Project and the role of education officers.

SCHOOL SELECTION

Although the composition of Project schools changed in 2012, the evaluators, with the guidance of the Project COR and Education Development Officer, made the decision to be primarily "backward-looking" and examine the literacy components the original cohort of Project schools, rather than visiting new schools. One of the first tasks of the evaluation team was to randomly select an appropriate sample of schools. The objective of the school selection process was to construct a list of schools representative of the original 250 Project schools in terms of region, size, location (urban, rural or remote rural), student performance and CBSI status. A total of 12 schools were selected based on a stratified random sampling method, which was then modified based on several additional parameters. Given the diversity across schools and regions, it became necessary to operationalize the selection of schools in two phases.

Table 2: Project schools by MOE region and CBSI status

MOE Regions		CBSI	Non-CBSI	Total
1	Kingston & St. Andrew	13	17	30
2	St. Thomas, Portland & St. Mary	9	39	48
3	St. Ann & Trelawney	-	24	24
4	St. James, Hanover & Westmoreland	21	20	41
5	Manchester & St. Elizabeth	1	37	38
6	St. Catherine & Clarendon	11	58	69
Total		55	195	250

Preliminary phase of selection. In the preliminary phase of school selection, which occurred prior to entering the field and initial discussions with the Project, selection of schools involved dividing the set of Project schools into twelve sub-sets based on MOE Region and CBSI status, as shown in Table 1. One school was chosen at random from each of these twelve sub-sets. In other words, one CBSI school and one non-CBSI school from each region was selected at random. During this first selection phase, one exception was that one additional school was selected from Region 6, because it contains the largest number of Project schools overall. To offset this additional school, only one school was selected from Region 4.

This first round of selection resulted in a disproportionate number of small schools being selected.²⁹ In order to include data from a more representative group of schools, and to maximize efficiency of data collection, a second round of sampling was conducted. During this round, some of the small schools from the first phase of selection were replaced with medium and large schools. In making these substitutions, the evaluation team ensured that the replacement schools matched the originally randomly chosen schools on the criteria of the schools' proximity to an urban area and recent student performance, based on the percentage of students gaining mastery on the Grade Four Literacy Test (G4LT).

This method yielded a list of twelve schools with profiles representative of the total set of Project schools. This set is summarized below in Table 2. Using a similar sampling methodology, six additional schools were chosen as alternates, in case the evaluation team was unable to visit one of the originally selected schools due to unforeseen logistical constraints. These schools are listed in Table 3 below. Of the 12 schools in the sample, four schools (Lucea, Padmore, Effortville and New Forest) were selected as case study sites, where additional interviews or observations were conducted. These schools were selected to include one high-performing CBSI school, one low-performing CBSI school, one high-performing non-CBSI school and one low-performing CBSI school.

²⁹ Small schools in this case were considered to be those with 30 or fewer students with scores on the Grade 4 Literacy Test (G4LT). Medium schools had more than 30 but fewer than 70 students with G4LT scores, and large schools had 70 students or more with these scores.

Table 3: Schools selected for data collection visits - first phase

School Name	Region	CBSI	Location	% mastery on G4LT 2011	Case Study
Padmore Primary	1		Rural	29	Yes
Holy Family Primary and Infant	1	Yes	Urban	70	
Mount Angus Primary & Junior High	2		Rural	38	
Hillside Primary	2	Yes	Urban	29	
Unity Primary	3		Rural	69	
Gibraltar	3		Remote	65	
Lucea Primary	4	Yes	Urban	76	Yes
New Forest Primary and Junior	5		Rural	91	Yes
Hatfield Primary and Junior High	5	Yes	Urban	51	
St. Mary's All Age	6		Urban	54	
Effortville	6	Yes	Rural	61	Yes
Old Harbour Bay Primary	6	Yes	Urban	59	

Table 4: Alternate schools selected for data collection visits

School Name	Region	CBSI	Location	% mastery on G4LT 2011
Golden Spring Primary	1		Urban	72
Duanvale Primary	3		Rural	41
Yallahs Primary	2	Yes	Urban	66
St. Paul's Primary	4	Yes	Rural	72
Retirement Primary	5		Rural	25
Eccleston	6		Remote	NA

Final School Selection

Subsequently, the sample was modified for the following reasons:

1. Based on discussions with the Project implementation team and USAID, the sample above was modified to ensure that it accounted for the shifts in the Project focus away from rural, small, non-CBSI schools and toward CBSI schools, along with a greater emphasis on Regions 1, 4 and 6. This change involved replacing Gibraltar in Region 3 with Sudbury All Age in Region 4. Given that there was no comparable school in the alternate list, Sudbury was chosen from the original list of 250 schools because its profile is similar to that of Gibraltar.
2. Hurricane Sandy, which passed over Jamaica immediately prior to fieldwork, made some schools in the parishes of St. Mary, St. Thomas and Portland inaccessible. One of the schools in the affected areas, Hillside Primary School, was therefore replaced by Yallahs Primary from the list of alternates. Consideration was also given to the fact that Hillside is a small school with less than 20 students with scores on the G4LT.

The final set of selection schools is represented in Table 5 below:

Table 5: Final selection of schools for data collection visits

School Name	Region	CBSI	Location	% Mastery on G4LT 2011	Case Study
Padmore Primary	1		Rural	29	Yes
Holy Family Primary and Infant	1	Yes	Urban	70	
Mount Angus Primary & Junior High	2		Rural	38	
Yallahs Primary	2	Yes	Urban	66	
Unity Primary	3		Rural	69	
Sudbury	4		Rural	70	
Lucea Primary	4	Yes	Urban	76	Yes
New Forest Primary and Junior	5		Rural	91	Yes
Hatfield Primary and Junior High	5	Yes	Urban	51	
St. Mary's All Age	6		Urban	54	
Effortville	6	Yes	Rural	61	Yes
Old Harbour Bay Primary	6	Yes	Urban	59	

EVALUATION PROCESS

The evaluation team began by reviewing existing program documents and data in order to inform the development of data collection instruments as well as the overall evaluation. The team then developed data collection instruments, including a classroom observation checklist and protocols for semi-structured key informant interviews with teachers, principals, education officers in MOE regional offices, officials in the central Ministry, parents, trainers of teachers and principals.

The members of the evaluation team visited and held discussions with key Project staff. These staff provided an overview of the Project and strategies involved in its implementation. The staff also proved important in providing direction regarding the identification of specific persons to include in the sample of key informants. The team held an initial discussion with the Project's oversight team at USAID. This meeting provided additional insight into the current direction of the Project and its role within the context of the Jamaican education system, as well as USAID's vision for the Project, expectations for the evaluation and expectations for the project's outcomes. These meetings served as essential opportunities for data gathering and enhanced the evaluation team's understanding of the Project and the evaluation context.

The team then field tested the instruments in schools in Region I. This step allowed the team to identify any issues with the data instruments related to ease of use and reliability and to make modifications to them to ensure the quality of data collected.

Fieldwork at the school level involved working in teams of two in each school to conduct classroom observations, group interviews with classroom teachers, and individual interviews with resource teachers and principals. For case study schools, teams also conducted group interviews with parents and other community stakeholders. At the school level, the individual and group interviews focused both on (1) the effects of training in leadership and management on principals' ability to support the reading program, and (2) the effects of training on teachers' implementation of strategies for teaching reading.

Direct observations were equally divided among first, second, and third grade classrooms:

Table 6: Number of observations per grade

Grade	Number of Observations
Grade 1	11
Grade 2	12
Grade 3	11
Total	34

- 1089 students in 34 Grade 1 through 3 classrooms were observed in the 12 sample schools.
- 3 literacy resource teachers and 1 technology resource teacher were observed in their classrooms.
- 7 resource teachers participated in individual interviews.
- 10 principals and 3 vice principals were interviewed.
- 8 group interviews were held with 72 classroom teachers.

- 28 education officers were interviewed in four regions (Regions 1, 4, 5 and 6), including five senior education officers and 3 officers with special responsibilities for projects funded by development partners.

APPENDIX V: COMPLETE SCHEDULE OF EVALUATION ACTIVITIES, MEETINGS AND INTERVIEWS

Date	Region	Location	Description of Activities	Team Members
Oct. 15- Nov. 4		Home base	Review of documents	All
Nov.1		USAID Project Office/ MOE, Caenwood Centre	Meeting with Jean Beaumont	Deon & Winsome
Nov. 2	1	MOE, Heroes Circle	Meeting with Dr. Faulkner	Deon
Nov. 5		USAID Mission Office	In-briefing with submission of final methodology, work plan and data collection tools;	Deon, Mike, Janet, Winsome
Nov. 6	6	Effortville Primary	Data collection and test instruments	Janet, Mike, Paulette, Clover
Nov. 6	1	Padmore Primary	Data collection	Winsome, Deon
Nov. 7	1	Holy Family	Data collection	Clover, Janet
Nov. 7	1	Padmore Primary	Data collection and Scheduling	Winsome, Deon
Nov. 7	6	Effortville Primary	Data collection	Mike
Nov. 8	1	Yallahs Primary	Data collection	Janet, Paulette
Nov. 8	6	Old Harbour Bay Primary	Data collection	Clover, Deon
Nov. 8		Mount Angus Primary	Data collection	Mike, Winsome
Nov. 9	6	St. Mary All Age	Data collection	Janet, Winsome
Nov. 9	1	Ministry of Education, Heroes Circle	Data collection – <i>SEO, PS, TOT,</i> <i>TOP</i>	Deon, Mike

Nov.12	4	Sudbury Primary	Data collection	Paulette, Janet
Nov.12	4	Ministry of Education, Region 4	Data collection - <i>SEO, PS, TOT, TOP</i>	Deon, Mike
Nov.12-13	4	Lucea Primary	Data collection	Winsome, Clover
Nov.13	5	Hatfield Primary	Data collection	Paulette, Janet
Nov.13	4	Unity Primary	Data collection	Mike
Nov. 13	5	Ministry of Education	Data collection - <i>SEO, PS, TOT, TOP</i>	Mike, Deon
Nov. 13		Jamaica Teaching Council	Interview with Winsome Gordon	Deon
Nov. 14	5	New Forest Primary and Junior High	Data collection	Janet, Winsome
Nov. 14		MOE regional office, Mandeville	Interviews with <i>EOs</i>	Deon
Nov. 15		USAID Project Office	Data collection, briefing – Jean Beaumont	Janet, Mike
Nov. 15	6	Ministry of Education	Data collection- <i>SEO, PS, TOT, TOP</i>	Winsome
Nov. 16		'Office'- Four Seasons Hotel	Preparation of Preliminary report; data coding & analysis; preliminary report drafting	All
Nov. 19		UWI Mona, Conference Room	Preparations for out-briefing with stakeholders	Janet, Mike, Deon, Winsome
Nov. 20		Stakeholder meeting	Out-briefing with USAID: Presentation of initial results	All
Nov. 21- Dec. 7		Home base	Preparation of report	All
Dec. 7		Home base	Submission of report	Mike

APPENDIX VI: INTERVIEW GUIDES

INTERVIEW GUIDE FOR MOE REGIONAL OFFICERS

Name: _____

Position at the Ministry: _____

Interviewer:

Region: 1 2 3 4 5 6

Date of interview: _____ Location of interview: _____

1. What is the role of the MOE regional office in implementing the reading and numeracy strategies under the USAID-Basic Education Project in sponsored schools across each region?
 - a. What is your understanding of the Programme that supports these new teaching techniques?
 - b. How has the regional office promoted the use of the new teaching techniques?
 - c. How is the MOE regional office providing assistance to Project schools to enable the implementation of techniques in classrooms?
 - d. What is the nature of the support provided by the MOE?
 - e. Do schools request assistance or is this something that MOE Education Officers identify and offer as part of the service to schools
2. How are the new teaching techniques being implemented in schools?
 - a. How are teachers implementing the new teaching techniques in Project schools?
 - b. What determines teachers' use of the strategies in their classrooms?
 - c. Have these techniques been integrated into teachers' common planning time?
3. Are available resources adequate for delivery of the new teaching techniques?
 - a. If not, has the MOE supplemented the instructional materials and resources provided by USAID?
4. Since the implementation of the Project have you had any opportunity to observe teachers trained through the Project?
 - a. How would you describe teachers' use of instructional materials provided under the Project?
 - b. What can you say about the use of technology (computers etc) in the classroom to enhance teaching and learning in reading and numeracy?
 - c. How has the use of these resources affected student performance in these schools?

5. How does your role as an education officer facilitate the implementation of the Project?
 - a. Have you had an opportunity to discuss the new techniques with teachers?
 - b. If so, what challenges/opportunities do they face in attempting to implement the new teaching techniques?
 - c. In what ways have you worked with teachers/schools to overcome these challenges they may face?
 - d. What is your role in spreading good practices throughout the Project schools?

6. Were you involved in the training of resource teachers and principals under the Project?
 - a. Are teachers adequately prepared to deliver the reading and numeracy strategies being implemented under the Project?
 - b. How effective is the use of Resource Teachers in enabling the spread of these techniques among other classroom teachers?

7. How are Principals in USAID project schools providing instructional support to teachers in the implementation of the new teaching techniques?
 - a. Is this any different from the support that Principals provide in non-project schools?

8. Have Principals in Project schools modified the organizational structure of schools and/or the planning process to integrate or accommodate the delivery of the new teaching techniques in classrooms?

9. What obstacles/challenges do Principals in Project schools face in relation to implementing the new teaching strategies?
 - a. How is the MOE helping Principals to overcome these challenges
 - b. Are there examples of success in the implementation of the Project?
 - c. How is the MOE viewing such success?

10. In your role as an education officer, how do you monitor standards for reading and numeracy:
 - a. What are the standards, how are they established (by what process or by whom)
 - b. Are these standards the same or different from those used in non-project schools?
 - c. Is there a difference between student performance in USAID project schools and non-project schools?

- d. What data does the MOE use to assess student performance in the project schools?
 - e. Have you had an opportunity to view/discuss (with the Project or within the MOE) the most recent baseline data on student performance in Project schools?
 - f. If so, is this an accurate representation of student performance in these schools?
11. Some schools in violence prone areas were given resources such as books, desktop computers, laptops, and other materials. Have you visited these schools, and if so, have you noted any difference compared to other schools that were not given these resources?
12. What is the relationship between the Regional Office and the USAID-BEP project team?
- a. Do you meet with the Project Team to discuss the strategies and the outcomes for sponsored schools?
 - b. If not, how do you receive information about the Project?

INTERVIEW GUIDE FOR SENIOR OFFICERS AT THE MOE

Name: _____

Position at the Ministry: _____

Interviewer: _____

Date of interview: _____ Location of interview: _____

1. What are the MOE's expectations of the USAID-Basic Education Programme?
2. Does the MOE view the strategies developed and implemented under the USAID-BEP as part of the delivery of Revised Primary Curriculum?
 - a. How do the new techniques align with the strategies espoused by the RPC?
 - b. Are these strategies being included in the primary education curriculum for Teachers' Colleges?
 - c. If not, why not?
 - d. If so, what is the current status of making the strategies part of the curriculum?
 - e. Apart from the implementation in the Teachers' Colleges' curriculum, how else will the MOE seek to mainstream the strategies nationally?
3. What arrangements has the MOE put in place to monitor the implementation of the Project?
 - a. Is there an assigned person in the MOE with responsibility for liaising with the Project team, following up with developments and ensuring dissemination to the regions and schools.
 - b. Does the MOE receive reports from the Project?
 - c. How are Regional Directors participating in the decision making process regarding implementation of the Project?
 - i. What autonomy do they have to work with the Project in the implementation of the Project
4. Has the MOE received additional support from International Development Partners (IDPs) for literacy and numeracy development?
 - a. If so, what is the nature of the support?

5. What is the relationship between the MOE's Core Curriculum team and the JETP project team?
 - a. What role did the Core Curriculum team play in relation to the development and implementation of the new techniques?
 - b. What role did the Core Curriculum play in the development of the training content for teachers and principals?

6. How does the MOE promote the use of the new reading and numeracy strategies in schools?
 - a. Did the MOE play a part in the selection of schools for the Project?
 - b. What was the basis for the selection of schools?
 - c. How will the MOE encourage and facilitate the use of these strategies beyond the Project?
 - d. Has the MOE made provisions for the resource needs of schools under the project including ensuring that adequate instructional materials are in place?

7. What assistance/support does the MOE provide to the regions and schools to enable the implementation of strategies in classrooms?

8. What is the role of the MOE in delivering training to teachers and principals?
 - a. If teachers and principals need additional and/or ongoing training is the MOE prepared to provide such training?
 - b. Has the training being offered by the Project to teachers and principals part of the MOE's Professional Development Programme?
 - c. Is there a budget line for this training in the MOE's national and local budget?
 - d. If not, are there plans to include this in the upcoming budget for 2013/2014?

9. Is there a system in place for the monitoring the performance of students in Project schools?
 - a. If so, is the implementation of the new techniques meeting the Ministry's expectations?

10. Are MOE senior officials aware of the challenges/obstacles that schools face in relation to delivering the new techniques in reading and numeracy?
 - a. Is the MOE considering ways to help these schools overcome the challenges?

11. How is the Ministry preparing to mainstream the new techniques nationally?

CLASSROOM OBSERVATION PROTOCOL

School Name: _____ Location: Urban Rural Remote Rural (*tick the one that applies*)

Region: 1 2 3 4 5 6 (*tick the one that applies*)

Grade/s _____ Students Present: Boys _____ Girls _____ Total _____ Students enrolled: Boys _____ Girls _____ Total _____

Date: _____ Start time of observation: _____ End time: _____ Observation began Beginning Middle of the lesson

Observer: _____ Teacher Gender: Male Female Resource Teacher

Teacher Stated Reading Lesson Objectives:

1. _____
2. _____
3. _____
4. _____

The following chart includes dimensions that will focus your attention during the observation. Tick descriptors that you observe in the classroom. Use the comments box to add detail about the observation. Space for additional comments follows at the end of the chart.

Dimensions	Tick -Observed in the Classroom				Observer Comments
The Teacher					
Teacher's Desk	Front of room <input type="checkbox"/>	Side of room <input type="checkbox"/>	Back of room <input type="checkbox"/>	No desk <input type="checkbox"/>	
Teacher's Role in lesson	Telling/lecturer <input type="checkbox"/>	Guiding Practice <input type="checkbox"/>	Monitoring class work <input type="checkbox"/>	Questioning <input type="checkbox"/>	
Teacher Manner	Encouraging <input type="checkbox"/>	Guiding <input type="checkbox"/>	Engaged <input type="checkbox"/>	On Task <input type="checkbox"/>	
The Students					
Student engagement (generally in class)	Enthusiastic about learning <input type="checkbox"/>	Following instruction <input type="checkbox"/>	Difficulty following instruction <input type="checkbox"/>	Disinterested or Lost <input type="checkbox"/>	
Students grouped for instruction	One-on-one with the teacher <input type="checkbox"/>	Small groups (3-6 students) <input type="checkbox"/>	Pairs <input type="checkbox"/>	Whole Class <input type="checkbox"/>	
Classroom Environment					
Classroom Space:	Over-crowded <input type="checkbox"/>	Crowded <input type="checkbox"/>	Sufficient space <input type="checkbox"/>	Roomy <input type="checkbox"/>	
Ventilation	Excellent <input type="checkbox"/>	Good <input type="checkbox"/>	Average <input type="checkbox"/>	Poor <input type="checkbox"/>	
Lighting	Excellent <input type="checkbox"/>	Good <input type="checkbox"/>	Average <input type="checkbox"/>	Poor <input type="checkbox"/>	

Equipment/Materials Present					
Instructional Materials	Texts/books <input type="checkbox"/>	Classroom Library <input type="checkbox"/>	Learning Corners/Centres <input type="checkbox"/>	Instructional Charts <input type="checkbox"/>	
Play Equipment	Games/puzzles	Toys	Learning manipulatives <input type="checkbox"/>	Small play items e.g balls <input type="checkbox"/>	
Use of supplemental materials (CBSI)	Computers <input type="checkbox"/>	Math Carts <input type="checkbox"/>	Jolly Phonics <input type="checkbox"/>	M.B. Library <input type="checkbox"/>	
Available Print					
What type of print do students have eyes on in class?	Chalkboard <input type="checkbox"/>	Book in hand <input type="checkbox"/>	Paper <input type="checkbox"/>	Computer <input type="checkbox"/>	
	White board <input type="checkbox"/>	Teacher's book <input type="checkbox"/>	Exercise book <input type="checkbox"/>		
Print content	Subject content (non-fiction) <input type="checkbox"/>	Literature/story (fiction) <input type="checkbox"/>	Authentic text (newspaper) <input type="checkbox"/>	Wordless Picture Book <input type="checkbox"/>	
Reading Instruction					
Before reading	Sets the scene <input type="checkbox"/>	Reads title <input type="checkbox"/>	Looks at pictures <input type="checkbox"/>	Predict content <input type="checkbox"/>	
Comprehension strategies observed	Uses student's background <input type="checkbox"/>	Sequencing <input type="checkbox"/>	Problem Solving <input type="checkbox"/>	Main idea/details <input type="checkbox"/>	
Reading lesson focus observed	Phonemic awareness <input type="checkbox"/>	Letter knowledge <input type="checkbox"/>	Decoding <input type="checkbox"/>	Comprehension-Sentence <input type="checkbox"/>	
		Word study <input type="checkbox"/>	Fluency <input type="checkbox"/>	Paragraph <input type="checkbox"/>	
Style of student reading	Oral reading <input type="checkbox"/>	Silent reading <input type="checkbox"/>	Pair reading <input type="checkbox"/>	Group reading <input type="checkbox"/>	
			Guided reading <input type="checkbox"/>		
Questioning	Predicting <input type="checkbox"/>	Give Facts <input type="checkbox"/>	Reorganize information <input type="checkbox"/>	Evaluating <input type="checkbox"/>	
				Create <input type="checkbox"/>	
Post reading tasks	Discussion <input type="checkbox"/>	Reviewing predictions <input type="checkbox"/>	Applying/using information <input type="checkbox"/>	Writing <input type="checkbox"/>	
Assessment of student learning	No assessment <input type="checkbox"/>	Review of previous lesson check <input type="checkbox"/>	Comprehension check <input type="checkbox"/>	Quiz or test <input type="checkbox"/>	

Sample student exercise books-focus on past performance and types of tasks.

The Lesson: Introduction

Development

Closure/Assessment

Observation of boy/s behavior during the reading lesson:

Observation of girl/s behavior during the reading lesson:

Teacher Role/Interactions

Instruction/Methods and Use of materials (print, chalkboard supplemental)

PRINCIPAL INTERVIEW GUIDE

Principal's Name: _____ Number of years at this school _____

School Name: _____ Interviewer: _____

Region: _____ Number of Students on roll= _____

Date of interview: _____ Location of interview: _____

Training: Timing and Duration

1. Did you attend principal training on how to support reading instruction in the primary grades?
2. Who provided you with training to support the implementation of this reading project in primary grades?
--(Name)
--Which organization supported them?
3. When did the training occur?
4. Where was it held? (Region or Central)
5. How long was the training? (e.g. one day, half day, a week)
6. How many times have you attended this type of training?
--Was it a coherent programme or separate trainings with different but somewhat related topics?

Topics and Methods

7. What topics were included in the training?
8. Which topic did you find most interesting?
9. Thinking back, which topic or idea do you think has made the most impact on how you manage your school?

Teaching Strategies

10. What strategies were most useful in training for you to support effective reading instruction in your school?
11. Which strategies have you promoted in your school or primary grades?
12. What change has occurred in primary reading instruction as a result of this training and your actions or policies in the school?
13. What reading material is available in the primary classrooms in your school?
-- (i.e. reading textbooks, story books, teacher or student made materials/books, big books, or flash cards)

Progress Monitoring

14. What is the aim of these new Early Reading Assessment Instrument (ERAI) tests?
15. How is the ERAI information about student performance useful for you as principal?
16. Do you think the test results on ERAI accurately reflect a student's reading ability?
17. How do you use the test results at you school?
 - Can you tell me about a time when you used the test results to make a decision?
 - How did that decision make a difference at your school?
 - Who makes that decision, the principal or the teacher?
18. Do your students' assessment results meet the standards set by the Ministry of Education?
19. Who provides remedial reading instruction in the school?
 - How often is the instruction given and at what part of the school day does it occur?
 - How many students are involved? How many are boys? Girls?
 - Is the instruction similar for boys and girls? If no, explain the difference.

Role of Regional Offices

20. Did the trainers (or anyone else) visit your school to follow up on the training?
21. What was the focus of their visit?

Role of USAID-funded Jamaica Basic Education staff

22. How have you implemented what you learned in your school?
23. Are the materials used in the mathematics or the reading class or both?

Challenges and Sustainability

24. CBSI What resources did you receive from the project?
 - Which resources do you think had the most impact on student performance in reading?
 - Why do you say so?
25. CBSI – Did you or teachers at your school receive training on how to use these materials? --From who? When? For how long?
26. CBSI How did the laptops and computers change classroom reading instruction?
 - Is there a difference in the level of use demonstrated by boys and girls?
 - Please explain the difference if one exists.
27. CBSI-Were you trained to use The Marilyn Burns Mathematics Library or Jolly Phonics?
 - How often do you use these resources?
 - How do the learners respond to these resources?
 - Is the response to the Mathematics Library different for boys than for girls or vice versa?
 - Is the response to the Jolly Phonics different for boys than for girls or vice versa?

FOCUS GROUP DISCUSSION GUIDE (TEACHERS)

School: _____ Interviewer: _____

Region of Training: 1 2 3 4 5 6 Number of Teachers: _____

Date of Focus Group: _____ Location: _____

Thank you for joining us to discuss the teaching of reading in primary classrooms. Can each of you tell us your name and what grade you teach?

Tally the number of participants representing each grade level.

Grade 1... _____

Grade 2... _____

Grade 3... _____

A combined or multi-grade class? _____

Other: _____

Training

1. What is different about how you teach reading today than two years ago?
2. Are these methods that you use to teach reading a result of training that you have received here at your school?
3. Who provided you with that training? Did you think the training was worthwhile?
4. What could be done to improve the training?
5. Have resource teachers introduced any new reading strategies?
6. How did the resource teacher deliver the training?
7. What did you think about the training materials? Were they of good quality?

Strategies

9. Which strategies that you learned in the training do you feel are
....most effectively in your classroom?
....least effectively in your classroom?
10. How do you decide which strategies to try out in your classroom?
11. Which strategy would you like to have additional training on so that you can use it more effectively?
12. Are there other topics that you would like to have included in future training?

13. How does your principal give you guidance about teaching reading?
14. How have school policies or procedures changed since this school became part of the USAID-funded basic education project?
15. Regional Education Officers visit your school occasionally. When they visit your classroom do they observe reading instruction or talk to you about how you teach reading?

Resource Teacher's Role

16. Does the resource teacher ever visit your classroom? If so, how often? What does the resource teacher do when visiting your classroom?
17. What (else) do resource teachers do in your school?
18. Did the training you received from resource teachers help you teach reading more effectively? Can you give me some examples?
19. Do you think resource teachers were adequately trained by this reading project to provide you with the techniques you need to help students read?

Progress Monitoring

20. Did you administer the Early Reading (ERAI) to any of your students in (month) 2010?
--If so, how did you select the students to test?
-- how many were boys/girls?
-- do you think the test results reflect your students true capabilities?
21. Were any of your students selected in 2011 to take the ERAI?
-- how many were boys/girls?
-- do you think the test results reflect your students true capabilities?
22. *Do you use data/results (information) on student assessments to guide your lesson planning? (Instruments other than ERAI may be used, e.g. Palmer Reading)*
--How do you use it, specifically?
--What information does it give about the boys and girls in your class?
23. How do you decide if a student needs additional assistance/remediation?
24. How can this project help you be a more effective teacher of reading?

Challenges & Sustainability

25. What aspects of this project do you consider difficult to implement?
26. What changes would you make to this project? Why?
27. What parts of this project would you retain for future use? Why?
28. Overall, how would you assess the contribution of the USAID-funded Basic Education Project to your school?

RESOURCE TEACHER INTERVIEW GUIDE

Name: _____

School: _____

Interviewer: _____

Region of Training: 1 2 3 4 5 6 (tick all that apply)

Date of interview: _____ Location of interview: _____

Selection & Training

1. How were you selected to be a resource teacher?
2. Who provided you with training to be a resource teacher?
3. Do you feel that the training was adequate to do your job well?
4. Did the trainer effectively deliver the training?
5. Did the trainer use quality training materials?
6. Where did you get the materials to replicate the training at your school?

Duties

7. What are your duties as a resource teacher?
8. What are your duties related to this reading project?
9. Do you teach a class full time?

USAID Training

10. I observed a strategy (name it) that you used during the lesson I observed. Did you learn that strategy at the USAID training?
11. What other strategies did you learn that you use often in your class?

Capacity Building

12. What new knowledge did you gain about the teaching of reading in primary classes during the training?
13. Which strategy that you learned in the training do you find most useful as you train your colleagues?
14. Which strategy (that you introduced) have you observed your colleagues (teachers) implement
 - most effectively in the classroom?
 - least effectively in the classroom?

15. When a teacher doesn't use an instructional strategy properly, how do you correct them or guide them to use it properly?
16. Do you ever demonstrate an instructional strategy with students so a teacher can observe you?
17. How do resource teachers interact with the Regional Ministry of Education office?
--Does anyone from that office provide you with additional training or guidance?

Progress Monitoring (Q1)

18. Using data or information gained from assessment is useful for reading instruction improvement. Can you give an example of how you used data in your role as a resource teacher?
19. Do you think the test results on ERAI accurately reflect a student's reading level?
20. How do you decide what instruction a student needs based on the results of ERAI?

Challenges & Sustainability (Q3)

21. What reading techniques are being used by your colleagues most effectively? Are there some techniques that they don't use?
22. What influences teachers to implement or not to implement a new teaching strategy?
23. Why do you think teachers are not using some of the strategies that you taught them?
24. What reason/s do teachers give for not implementing the strategies that you introduced?
25. What professional development that you have participated in the past has made the biggest difference in how you teach reading? (Was that a USAID sponsored activity?)
26. If you could request additional training; what topics or strategies would you request?
27. Do teachers have access to sufficient instructional materials for teaching reading comprehension?
28. Do you think the school you work in has an environment that is supportive of this reading project or the improvement in reading instruction generally?
29. **CBSI** – How did the laptops and computers change classroom reading instruction?
--Is there a difference in the level of use demonstrated by boys and girls?
--Please explain the difference if one exists.

30. **CBSI** – What resources did you receive from the USAID project?
--Which resources do you think had the most impact on student performance in reading?
--Why do you say so?
31. **CBSI** – Did you receive training on how to use these materials or the computers?
--From whom? *When? For how long?*
32. **CBSI**-Were you trained to use The Marilyn Burns Mathematics Library or Jolly Phonics?
-- *How have you implemented what you learned in your school?*
--*Are the materials used in the mathematics class or in the reading class or both?*
--*How often do you use these resources?*
--*How do the learners respond to these resources?*
--*Is the response to the Mathematics Library different for boys than for girls or vice versa?*
-- *Is the response to the Jolly Phonics different for boys than for girls or vice versa?*
33. Do you think, as a resource teacher, you are making a contribution to your school? If so, how? (probe for contributions for other teachers, students, principals).
34. Overall, how would you assess the contribution of the Basic Education Project to your school?

TRAINER OF PRINCIPALS INTERVIEW GUIDE

Name: _____ School: _____

Position: _____ Interviewer: _____

Training of Principals for Region 1 2 3 4 5 6 (mark all that apply)

Date of interview: _____ Location of interview: _____

Background and Preparation

1. What was the main focus of the training for principals?
2. Who prepared the materials for the training?
-- Did you have any input in the preparation of materials?
3. How were you trained to do this training of principals?
-- Who conducted the training?
-- Do you feel that you were adequately prepared to conduct the training? Please elaborate.
4. Did your trainers observe any of the training or ask you what worked in the training?

Principal Training: Timing and Duration

5. When did you conduct the principal training?
6. How was the training organized?
-- (e.g., by region; or were schools grouped together in another way)
7. How often did the training occur? Over what period of time?
-- (e.g., once?; many sessions? Please note duration/schedule of sessions)
8. How many principals did you train?
9. Did the principals attend all sessions?
-- Was there erratic attendance or drop-outs? Please explain.

Topics and Methods

10. Please describe the training materials.
11. What topics did you include that related to classroom reading instruction?
12. What methods did you use during the training?
-- (e.g. Lecture, problem solving, case studies, etc.)
13. Did you include topics related to school management?
-- If so, what did you cover? How much time did you devote to this topic?

- Was the concept of “principal accountability” included in the training?
- Can you provide an example of an action that you think demonstrates that a principal is accountable for the performance of students?

14. Was the training you delivered sufficient for the principals to support the implementation of the new reading programme?

- What would you describe as the most successful aspects of the training and any subsequent follow-up? The least successful aspects?

15. Have you visited the principals at their schools to observe how your training is being put into practice? If so:

- What is the name of the schools that you visited? (Which regions?)
- Do you have a budget for school visits?
- Do you have adequate transportation for the visits?
- Did you talk to the principal about implementing the training at the school?
- What challenges did the principal report to you about implementing the training?
- Did you observe any strategies, taught during the training of principals, being implemented successfully by principals?
- How do you think those strategies impacted instruction in the classroom?

Role of Regional Offices

16. How do the Regional Offices support the principals?

17. Do you communicate regularly with the Regional Offices? About this project?

- If so, what is the content of the communication? How often does it occur?
- Do Regional Offices provide you with any feedback about the principal training or potential future training areas?

18. What support from the Regional Office do you think is necessary to ensure success of this project?

Role of USAID-funded Jamaica Basic Education staff

19. What role, if any has the project played in the continuing education of principals? teachers?

- Has this support been adequate? How should the project focus its efforts during the final (two) years?

Challenges and Sustainability

20. What challenges do you think remain for principals that might be addressed through additional training?

21. What, if any elements of the project, are likely to be sustained after the project ends?

- What should the project be doing to ensure sustainability of its efforts?

APPENDIX VII: SUMMARY DATA FROM CLASSROOM OBSERVATIONS

Number of classroom observations = 34

Classroom Setup

- Teachers were equally as likely to place their desk in the back of the room as on the side of the room. (16 observations each)
- Teachers were less likely to place their desks at the front of the room. (11 observations)
Teachers were rarely observed teaching from their desks.

Teachers

- During observed lessons, over 50% of the teachers guided student practice using questioning.
- 15% of the teachers were observed lecturing during the lesson.
- The majority of teachers (71%) encouraged students and guided them during instruction.

The Students

- Over 70% of the students in the classes observed were enthusiastic and following directions given by the teacher.
- Students were most likely (94%) to receive instruction given to the whole class at one time. Some (32%) small group and one to one (15%) instruction and was observed. (Totals exceed 100% as teachers used more than one way of grouping students during a lesson.)
- Half (50%) of the classes were crowded or over-crowded and the other half (50%) had sufficient space.

Equipment

- Teacher-made instructional charts were evident in 75% of the classrooms. Learning Centers were set up in 62% of the classrooms but none were used during classroom observations. Just over half (53%) of the classrooms had small classroom libraries.
- Although 47% of classrooms contained some instructional manipulatives.

Print

- In over half the classes students saw print on either a whiteboard (62%) or a blackboard (52%). Some classrooms had both types of boards.

- 44% of students had a book in hand or shared a book (12%) with another student during the lesson.
- In 41% of the classes, students had photocopies of worksheets or text on their desks.

Strategies observed

When texts were used during a lesson 47% were fiction and 24% were non-fiction. Since much of the text viewed by students during a lesson is from the board, they were not classified as fiction or non-fiction.

47% of teachers prepared students for reading extended texts by setting the scene. 35% of the teachers read the title of the book or story to the students. In some cases the students were asked to identify the title of the book. 26% of teachers asked students to look at the pictures in the book.

20% of teachers used the strategy of predicting text when introducing a new text to students. 41% of teachers used the strategy of relating the student's background.

Problem solving strategies were more often used (24%) than sequencing (6%) or identifying the main idea and supporting details (12%) during reading instruction.

Phonemic awareness (50%) and word study (53%) were the two most observed strategies used during reading instruction.

Reading skills for more independent readers, such as decoding, fluency, sentence and paragraph comprehension were observed during less than 24% of the class observations.

Students were observed reading aloud in 64% of the classes and reading in groups or in pairs (29%).

Other strategies observed included: predicting (24%), expressing facts (34%), reorganizing information (21%), evaluating (24%), and creating new ideas from the text (18%).

APPENDIX VIII: CASE STUDIES

INTRODUCTION

This section of the performance evaluation report presents in-depth case studies of four schools from the sample that were selected based on defined criteria. The purpose of these case studies is to highlight project implementation and present additional factors that impact their success levels. Based on the 2011 Grade 4 Literacy Test, the team selected two high-performing schools, Lucea Primary School and New Forest Primary, Junior High and Infant School, and two low-performing ones, Effortville Primary and Padmore Primary. Unlike the other schools, Effortville and Lucea received supplemental instructional resources through the Caribbean Based Security Initiative (CBSI). Although Effortville was originally identified as a low-performing school, the case study showed that it could better be described as an average-performing school, displaying characteristics of both high-performing and low-performing schools.

High-performing schools demonstrated strong leadership that was strengthened through project training, and vibrant resource teachers who replicated project training in their schools and offered follow up instructional support to their colleagues. High-performing schools also received support from the Regional Education Office and featured high teacher engagement with students, who had their hands on books and used real texts. These schools showed clear evidence of improvements in reading instruction by utilizing project techniques such as *Know-Want to Know-Learned* (KWL) and *Drop Everything and Read* (DEAR). High performing schools also used basal readers or other texts to link phonemic awareness and phonics instruction to reading activities. The schools tracked individual student progress and made efforts to differentiate instruction by grouping students for reading instruction. Additionally, parent and community involvement supported the acquisition of reading proficiency in Grades 1-3 at these schools.

The most significant detriment to project implementation and school success identified in the case study schools was the instability of leadership and staff. In schools where principals or staff changed during the course of project implementation, teams observed less intensity in project implementation.

CASE STUDY REPORT I: EFFORTVILLE PRIMARY

The School

Effortville Primary School is located in Clarendon parish, in the parish capital of May Pen (estimated population 60,000), about 2 kilometers from the main market, the Central High School and the largest primary school in May Pen, May Pen Primary. The Ministry of Education classifies Effortville Primary as an urban school, but despite its closeness to May Pen, the neighborhood has a suburban feel, and is comprised largely of single-story smaller homes. Effortville is a coeducational school and operates the whole day. The school has a capacity of 285, but according to the latest Ministry data, its enrollment is 386, or 1.6 times capacity. The pupil to teacher ratio as reported by the Ministry is 30 to 1. It is designated as a Caribbean Basin Security Initiative (CBSI) school, and although it was chosen as a lower performing school from among randomly selected schools,³⁰ it is actually more of a middle-performing school on literacy tests, with 61% mastery on the Grade 4 Literacy Test in 2011.



Figure 2: Effortville Primary School

The Community

Clarendon, Jamaica's third largest parish with a population of over 200,000, is located on the south of the island, roughly halfway between the island's east and west. Clarendon is bordered by Manchester on the west, Saint Catherine in the east, and Saint Ann in the north. The parish is predominantly a wide plain, with several rivers, including the longest in the country, the Rio Minho River, which runs the length of the parish. Toward the northern end of the parish lies the Bull Head Mountain range (2,800 ft.), which is considered to be the geographical center of the island.

May Pen is a busy market town. It was established as a plantation settlement by the British between 1660 and 1683 on a crossing point of the Rio Minho River, and is now at the center of the parish, at a

³⁰ 2010 was an anomalous year in that scores at the 4th and 6th grade levels were very low. This was a year in which the area surrounding the school experienced very high levels of violence.

mid-point on the Kingston to Manchester road. During its heyday, with an economy based on bauxite mining, as well as citrus and sugar production, Clarendon was among Jamaica's leading parishes in terms of economic activity. However, Jamaica's strategic bauxite and alumina export sector was badly hit by the global economic downturn that reduced international demand, forcing several plants on the Caribbean island to halt or slash production and lay off workers.³¹ The parish still remains an important economic engine for the country as bauxite prices are beginning to recover. Agricultural production remains strong, and most of the island's tobacco is grown in Clarendon, along with cotton, pimento, ginger, livestock, indigo, bananas, coffee and cocoa.

In recent years, May Pen and the areas immediately surrounding the Effortville Primary School have suffered from high criminality and violence. According to one observer:

“The location of Effortville Primary School leaves a bad stigma on the educational institution and an unfair perception that overshadowed the teachers' exemplary work at Effortville. ... Only education can break the back of criminality, by severing the link between crime and poverty, so if we don't support the kids' educational development now and they should fall through the cracks of life, I promise you that they will come to haunt us in the future, with deadly consequences.”³²

Parents

Parents come for devotion in the morning before the first class bell rings. After devotion, evaluators met with eight parents, all of whom live within walking distance of the school, and asked them what the children were reading in literacy classes. Parents with children in first grade indicated that they were helping children learning to find missing letters in words. In second grade, they helped with homework on letters, words, plurals and past tenses. Parents said that since there has been a new emphasis on literacy, they have seen their children able to explain the things they see and learn, and that they had seen several improvements to the school over the years. According to these parents, there are no major discipline problems, and there were no fights on the school grounds, although there were sometimes disputes near the school and in other areas near May Pen.

Because the area around the school is known for crime and violence, evaluators asked if there was a problem of violence in the neighborhoods surrounding the school. Several parents answered that there were not, that most of the problems were far from the school and that violence was not a problem in their immediate community. When evaluators asked them what caused violence or murder locally, most said they did not know much about that – that there was not necessarily a pattern to killing or violence, that it was “friend against friend.”

In general, parents showed visible reticence to discuss issues related to crime and violence. When evaluators discussed this reticence with some of the community leaders in May Pen, they indicated that because of the intensity of crime and violence, people in the communities are very reticent to talk about anything they see or hear with people outside their immediate communities, since the risk of being stigmatized as an informer and eventually ending up as a victim of crime oneself is perceived as being high.

³¹ Reduced bauxite and alumina export revenues was one of the factors that forced Jamaica to enter a more than \$1 billion standby loan agreement with the International Monetary Fund in February 2012 in a bid to shore up its vulnerable economy against economic shocks. The government was also in negotiations to sell its shares in Jamalco. See, for example, “Jamaica to sell bauxite/alumina stake to China firm,” (Reuters) April 22, 2010. <http://www.chinamining.org/Investment/2010-04-22/1271916219d35703.html>

³² Horace Fisher, *Jamaica Gleaner*, “Effortville Primary Boosting Education For Sixth-Graders,” November 28, 2011. <http://jamaica-gleaner.com/gleaner/20111128/lead/lead95.html>; Photo of students from: <http://www.facebook.com/pages/Effortville-Primary-School/14699461908004>

Evaluators also interviewed a parent who was a parent-teacher association officer about the role of the PTA. According to her, the Effortville PTA discusses what is going on generally in the school, what kinds of changes are proposed, what types of behavior problems certain children are having, and ways to resolve issues if parents do not agree with school practices. She said that PTA members are aware of the USAID project and know that it had helped with books and reading skills. She viewed this kind of work as very important because, as she said, “the children will get nowhere if they can’t read or can’t talk.”

Parents also spoke about community programs in their area. Parents said that the police in their community are doing a good job, and that the police youth club sponsors sports activities and helps to cut down on crime in the community. They also referred to the Citizen Security and Justice Program (CSJP), which they said helps to get young people into trade programs such as mechanics, woodwork, cabinet making, electrician training, and computers. In earlier periods, the local social development committee (SDC) provided job training in a variety of areas but now, however, the SDC suffers from very limited funding.

Parents said that paying school fees, which are J\$2500 (about \$30 US) including insurance plus some other miscellaneous costs, is hard on their budget. Moreover, the cost of specialized books is high. For example, two parents with children in Grade 4 had just bought a test prep book for Grade 4 exams and these cost J\$1270 (\$15 US), a relatively hefty sum for parish residents. Despite the cost of reading materials, most of the parents interviewed said that their children had enough to read. When they can, some said they buy the “Children’s Own” newspaper (J\$20, about \$0.25 US), which children can read by themselves. One parent with children aged 14 and 17 has left behind “a big box with lots of books” to share with other children.

Parents mentioned with particular pride the school’s second grade resource teacher and described her as a dedicated teacher who will call parents at home immediately if there is a problem. This resource teacher, who has a dynamic teaching style and is very well versed in the approaches of project methods, comes from Effortville, and has deep ties in the community.

Community Leaders

Evaluators spoke with the CSJP coordinator, who described the program as a crime-prevention program targeting the 17-25 age group that offers unemployed youth skills training and a “second chance.” The program, which operates in 59 communities in 14 parishes, provides back-to-school tuition support. Communities are recommended by police to the Ministry of National Security, and funding comes from the UK’s Department for International Development (DfID) and the Inter-American Development Bank (IDB). Depending on the community, CSJP can also an after-school tutoring program for younger children to help them prepare for the Grade Six Achievement Test (GSAT). The program in May Pen offers this tutoring program. There is also a parenting group that offers training to parents.

According to the school’s chaplain, the parish of Clarendon and town of May Pen have been affected by violence, and the period of 2008-2010 seems to have been particularly plagued by community violence. She indicated that she heard shots where she lived in another May Pen suburb the Saturday before the interview, and that a security guard had been killed over the weekend while attending a funeral wake; there is no information on whether the killing was related to his job. She said that the previous Thursday, in another township about 5 minutes’ drive from hers, there was another killing. She said that there are many reasons for the killings – they could be based on relationships with girlfriends. In the case of the security guard, it is possible that someone had come to the plant where the guard worked and had a dispute. The CSJP coordinator thought that things continued to worsen in terms of violence. She says that she sees this reflected in the behavior of children, who sometimes lack respect when visitors come to the schools. (The evaluators who visited this school did not share this impression.) She attributes this to violence in the community: “These children have seen family members killed.” She said

that in one group interview with children, three-quarters of children raised their hands when asked if there had been a death in their family due to crime.

A former resident of Effortville who has a relative attending the school and now lives in Atlanta, Georgia, donated 7,000 books to the school library. They shared the books with the nursery school and high school in town. According to several respondents, these books have really encouraged reading, particularly since the school has not received any readers from the Ministry for the past six years.

The Principal

Effortville has an Acting Principal who has filled the position for over a year. She was a teacher at the school for the previous 19 years. She attended two principal training sessions last year presented by Dr. Beaumont. Project personnel and an education officer supported the regionally held conferences. Each training session was held for one day in May Pen. Topics at the training included management and leadership. The most interesting topic for her was “how to get teachers to realize what they need to do.” She thinks that this topic has made the most impact on how she manages the school regarding different aspects of reading. She found the most effective strategy to be on critical reading. She has implemented an idea that she learned at the training for the teachers to hold Thursday meetings to share new strategies. As a result of the training, she has designated one resource teacher for upper grades and one for lower grades. She uses the guidance counselor to substitute in the resource teacher’s class when that teacher visits other classes or helps teachers. Among the most important teaching strategies for her are those related to comprehension and critical reading. She said that strategies for reading promoted in faculty meetings are shared across the school among staff and students. She indicated that the reading level of children has improved over time, but that literacy tests hit a low in 2010 as a result of an upsurge of violence in the area. There has been little school-based progress monitoring as yet, but teachers went to a project workshop in the summer on early reading assessment, and they were expecting to begin using the assessment checklist shortly. No project personnel or regional education officer has visited this school for the past year. The education officer did, however, come during the summer to borrow the school’s Jolly Phonics kit.

The principal appreciated the materials provided by the project and lamented that one laptop given by the project had been stolen during a break-in. The laptop had helped to increase student interest in reading, and the saddest part of its loss, she said, was that all the data was lost with the stolen laptop. Teachers had begun to create e-Portfolios and had no back up of the data that they had entered, so they are feeling quite defeated, since they cannot implement this instructional strategy. As one third-grade teacher later stated “we were robbed of the freedom to educate.” Overall, the principal finds the project very good and sees it as being successful in her school.

The Resource Teacher

Training. The resource teacher was the school’s technology specialist and also served as the literacy specialist responsible for Grades 1 through 3 in the absence of the actual literacy resource specialist, who was on leave. She liked that there were a variety of technologies used in project training, including audio and computers. She received her teacher training at Moneague College and had received project training over the past two years. She indicated that the project technology training was very good and that the facilitators, Dr. Melody Williams and her team, were excellent. The program was much more organized in 2011 than in 2010, when she felt that communication was inadequate.

Quality of Project Materials and Methods. The resource teacher said that project materials were very good and relevant. In the past, she said, other books the school had were old, totally inadequate and inappropriate. She had made much use of technology at the school until the laptop was stolen. She described her use of the early reading instrument, which was introduced to her by the project, and which enabled her to diagnose and address the individual needs of students who were not reading fluently.

Resource Teacher Duties. The resource teacher shares the material and learning experiences with the other teachers in the school. This is done every Thursday during the planned training sessions for teachers, which lasts for one and a half hours. She distributes books and other materials to the teachers, keeps a log and is held accountable for its use. Teachers have the flexibility to change the topic of the week, but by and large an area is identified and that becomes the overall focus for the entire school for that week. Approaches and strategies are coordinated by the literacy specialist in the upper school.

Assessment. Students are assessed at the beginning of the year, and their progress is tracked throughout the year. A report is created to show growth. According to the resource teacher, reading has really improved in the time since the project has been implemented. E-portfolios had been used as a one-on-one learning experience to track student's progress.

Challenges. For the resource teacher, the main challenge to project implementation at her school was that there were not enough copies of material for all the students in class. Printing is very expensive and even though students are asked to make a contribution, the contribution is minimal. She says that she needs "stacks of worksheets"; what exists is limited to a few copies.

Observation of the Resource's Teacher Class

The Students. Students were very active throughout the lesson and were very enthusiastic about learning. They were able to follow instructions without any problems. Quite a few were distracted by our presence; however, in many instances, the teacher was able to engage/reengage them.

The Classroom Environment. The teacher's desk was located at the side of the classroom, and desks were in rows. Each row was grouped and given the name of a fruit (Cherry, Mango, Pineapple). The room was a bit crowded, but ventilation and lighting were good. On average, there were three students to each desk.

The Lesson. In one lesson, the evaluators counted approximately 15 strategies learned during project training. The class began at 8:40 when the resource teacher announced to the group that they would begin by reading. Students were asked to take out the assignment, which was a handout on which there was a passage. Students had been asked to take the paper home and have parents help them read a passage called "The Treasure." Some students had left their handout at home but a large majority (90%) had brought it. Those who did not have the handout were asked to share.

Students were asked to read one paragraph aloud together. This they did twice. They were stopped a few times while the teacher corrected the pronunciation of "dream." Students were then asked to find a number of words in the passage including "asleep" and "maybe." Students were told to read the passage for homework and that they would read the next paragraph the following day.

Students were asked to put away the paper and were told that the next activity would be to identify and spell a list of 25 words, which were written on the board. It took quite a bit of time to conclude this activity. Students were then asked to sing "Pass the Ball." The student who held the ball at the end of the song had to go to the white board and identify words which the teacher would call out (football, strong, mummy, vegetable, meat). As a follow-up to the activity, students were asked to explain the difference between 'meat' and 'meet.' Students were extremely enthusiastic to do this activity.

The next activity was the playing of a story from a compact disc. The teacher distributed books and students sang while the teacher prepared the CD. There was one book for four students. Students read along with the storyteller. This exercise lasted five minutes. The teacher then wrote the word "just" from the book on the whiteboard. They practiced saying the word with emphasis on "st". Students were quizzed about the story. Those who answered correctly were rewarded with red stars. The teacher then wrote, "my granny tammy loved to kiss me" on the whiteboard. Students were asked if there was anything wrong with the sentence. Students were selected to make the corrections. Next in the sequence was the use of verbs. Students told that they were going to be looking at verbs – regular and

irregular. Students were asked if they remembered any verbs used in the story (play, skip, jump, play, kiss) and were asked how they could be changed to the past tense, and why there were differences in spelling.

Equipment and Available Print. Many textbooks were visible in the classroom, and there was a reading corner as well as many instructional charts on the wall all around the room. There was wide use of the whiteboard, books in hand and handouts. For the reading lesson students had to share. The teacher asked the students to read with her from her book that she had used.

Other Teachers

The teachers interviewed in a group discussion indicated that the resource teacher has trained them on literacy strategies with them each week on Thursday for the past year, which they try out in their classrooms. They think the most effective strategy they learned in the project is Know-Want to Know-Learned (KWL). Some also indicated that they like the directed reading approach that they learned at teacher's college where they first introduce key vocabulary, then have the students spell out loud, followed by a variety of activities. Students enjoy music, which holds their attention. Activities that get the attention of boys are especially useful, particularly the use of manipulatives such as paint and puppets. The school is responsible for obtaining materials, but they do not have as many materials as they would like. Many students do not have textbooks, and the copy machine is often not working, so teachers cannot make handouts. Teachers also indicated that the book donation from a former student has really helped their library and reading program.

At this school, the resource teacher does not have enough time to observe others teaching in class. However, she does send a book around to all the classes with guidance for the teachers to try particular strategies, and when they have done so, they sign the book. She tries to use the coaching techniques that she learned at various workshops.

Observation of a Non-Resource Teacher's Class

The Teacher. The teacher's desk was located at the side of the class and was heavily cluttered with books, papers and other instructional materials. Her delivery of the lesson was one of guided practice, and her manner was encouraging, guiding and engaging. Although there was a lot of distracting noise coming from the adjoining classroom, the teacher kept the students on task throughout the delivery of the lesson.

The Students. The students were very enthusiastic about learning, and most were able to follow the instructions given by the teacher. While the teacher used whole class instruction for the introduction and development of the lesson, the students were placed in groups according to ability for the closing and assessment of the lesson.

The Classroom. The general classroom environment was fairly good, with sufficient space and excellent ventilation and lighting. The walls in the classroom were decorated with a variety of instructional charts, posters and other learning resources. There were also a number of books, games, puzzles and other resources displayed in an area that could be considered a reading corner. The teacher made fairly good use of a white board for writing instructions and content during her lesson, and she introduced a chart with a short story titled "A Strange Place" written on it for the main topic of her lesson. Even though the students were able to read from the chart, the lettering on it was far too small to cater to students who are visually challenged. The students used the exercise for the assessment section of the lesson.

Reading Instruction: Introduction. The teacher did not state the objectives for the reading lesson, and she started the lesson by reading the title of the story. While she used the students' background, questioning and problem solving as comprehension strategies, she did not spend sufficient time to engage and involve as many students as possible in the introduction to the lesson. The teacher wrote a number of words from the story she was presenting on the white board. While this was a useful

strategy, instead of asking the children to try and identify the words, she told them what the words were. It would have been more appropriate for her to use flash cards and to allow the children to figure out the words for themselves.

Reading Instruction – Development. In the development of the lesson, the teacher used questioning techniques to lock in the students’ engagement and participation. While this approach worked for most students, there were a few students at the back of the class who did not appear to be sufficiently engaged. The students read orally as a whole group from the board. (This strategy, called choral reading, is helpful in developing fluency and smooth reading. It also keeps the students from being bored while listening to others read.)

Closure and Assessment. The assessment of the students’ learning was done to check their comprehension of the story. The post reading task given by the teacher dealt primarily with the students’ application of the information given during the development of the lesson. This was followed by a written assessment, which was done in two groups: The more advanced students were asked to write four sentences about rides found in the playground, and the slower students were asked to draw and label three rides found in the playground.

CASE STUDY REPORT 2: LUCEA PRIMARY SCHOOL

The Community

Hanover, Jamaica's second smallest parish, is home to Lucea Primary School. The parish sits on the northwestern tip of the island of Jamaica and is bordered by the parishes of St. James to the east and Westmoreland to the south. This tiny yet historic parish boasts a rich cultural heritage and is the birthplace of one of Jamaica's national heroes, Alexander Bustamante. According to the national census, the 2011 population was 69,533.³³

Hanover is known for the production of yams, sugar cane, ginger, rice, pimento, turmeric, breadfruit and arrowroot. Hanover is celebrated for its fine breeds of cattle. Pig and goat rearing are also common in the parish. Hopewell, in eastern Hanover, boasts large hotels and a world famous golf course, Tryall. Employment opportunities come through these resorts along with others in Westmoreland and St. James.

The School³⁴

Lucea Primary is located approximately 1.5 km from the town center of Lucea, in Western Hanover in Education Region 4. Named after the parish's capital, the school is located in Malcolm Heights, a lush, vegetated, sea town community. It boasts a clear view of the sea and a cool, relaxing breeze. The clean grounds and the bright blue, newly-built blocks provide a pleasant setting that is ideal for learning. The school's motto is: "Do it with all thy might." The school is part of a cohort of Caribbean Basin Security Initiative (CBSI) schools, and Lucea was selected as a high-performance school based on its performance on the Grade 4 Literacy Test. Lucea has an enrollment of 937 students (449 boys and 488 girls). The average daily attendance rate is 82%. 436 students (51%) are recipients of PATH benefits, which provide children with free meals.

One of the guidance counselors shared that there is no stigma attached PATH children at Lucea Primary. Every student receives the same lunch each day, whether they pay from their own pockets or the government pays through the PATH program. She lamented the fact that some undeserving students were on the program while some who really needed that support were not benefitting from it. The acting principal informed the evaluators that the PATH lunch program is also complemented with a breakfast program, and both have helped to boost school attendance significantly.

The school's acting principal noted that the environment was ideal, but that the community support was lacking. Vandalism of school property was sometimes an issue – the principal added that the community needed to take greater ownership of the school. She admitted that security arrangements at the school needed to be enhanced.

According to the principal, education officers are always available to support the school, and school visits are regular.

The school participates actively in parish and national events such as 4H Club competitions, Spelling Bee, Junior School Challenge Quiz, Jamaica Cultural Development Commission's Festival of the Arts, football, cricket and reading competitions. Lucea Primary is ranked among the top primary schools in cultural activities in the parish. It was Hanover's cricket champion in 2008 and 2009. Some activities promoted at the school level include debating competition, Jamaica Day and Boys' Day.

Infrastructure. The school has three buildings, with the oldest being built in 1959. The most recent addition was done between 2008 and 2009. The buildings accommodate classrooms, the principal's office,

³³ Population census data from <http://statinja.gov.jm/popcensus/Popcensus%20Doc/CENSUS2011BROCHURE.pdf>.

³⁴ Images from <http://lucea-online.com/>.

a staff room, a secretary's office, two children's bathrooms, a canteen, a tuck shop, a library, a performing arts room and three water fountains. The older buildings are in need of repairs to improve the roof and lighting.

Security. The school is enclosed by a chain-link perimeter fence that keeps trespassers out. Vendors line the school's entryway, selling school supplies and food to the students each day. Students are not allowed outside the gate during school hours, in order to reduce safety issues associated with being on the roads.

School community relations. The school facilitates community activities such as the Adult Learning Center, youth club meetings, Sunday school and other functions. The school serves as an emergency shelter in cases of natural disasters. The community, in turn, assists the school in fund-raising activities such as Harvest, fun days, sports day and Labor Day. The health center also does periodic student health and dental checks.

Parent-teachers association. The school has an active PTA body that meets every fourth Monday. Many parents are unemployed, and this affects their children's attendance and performance. The employed parents work in tourist industry businesses such as the Grand Palladium Hotel, as well as banks, gas stations, supermarkets, haberdasheries and government agencies. Other parents are self-employed in vending, domestic help, taxi operations, cosmetology and farming.

Teachers

31 teachers, a principal and vice principal and two guidance counselors form the team that support the school's mission "to provide a system which secures quality holistic education for all students ... to optimize individual and national development."

100% of teachers are trained at the Diploma level, and 62 % have attained post-diploma training. The teacher to pupil ratio is 1 to 35. Two National Youth Service workers work as teacher's aides in the school.

The Principal

The acting principal has only been in her current position for three months, but she is well informed about the project through her engagement with during her time as vice principal. She said that she attended three training sessions in 2010 and recalled exploring topics such as leadership and management. She encourages her resource teachers to share what they learn in the workshops, particularly in the faculty meetings or common planning sessions. She noted that the "Drop Everything and Read" strategy was widespread in her school. In order to provide targeted instruction, classes are streamed, or tracked, by students' abilities. According to the principal, instruction is usually similar for both boys and girls. She described the education officer as very supportive, and she said that her school is visited regularly. Regional office staff members, who often visit in teams, conduct classroom visits and training activities for teachers and parents at different periods throughout the year. The acting principal expressed her appreciation for the regional officers who supported her since she took up her post.

As a CBSI school, the school received materials from the project, and these were used across the classes in Grades 1 through 3. The principal said that the Jolly Phonics kit was the resource that had the most impact on students' performance. According to teachers of Grades 1 through 3, these materials bolstered the school's strong emphasis on phonics in these grades. In support of this effort, the school



Figure 3: Teacher at Lucea Primary School

sourced Jolly Phonics workbooks for children in these grades to supplement the kit that the school received from the project, and parents were encouraged to purchase the books from the school at a reduced cost. The laptop donated by the project is shared among the teachers. She noted that that the technology has increased students' interest in reading and has made the lessons more interesting. However, she was never trained to use the materials. She stated that:

“The students respond very positively to all the materials, mostly because of the ‘hands-on’ nature of the resources.”

Classrooms

The classrooms observed were overcrowded. Although space was limited and the furniture and materials that filled the room left little space for movement, the ventilation and lighting were fairly good. The walls were decorated with a variety of brightly-colored instructional charts, posters, and other learning resources. The evaluators observed classroom reading and math libraries, books of different genres, charts, games, puzzles and other teaching and learning resources in the classrooms. The students were generally enthusiastic and eager to learn. They were also attentive for the majority of the lesson. Girls often took the lead in the lessons. Students were instructed as a whole class, in small groups and individually. The evaluators also observed the use of excellent transition activities in the lessons that served to focus student attention, such as repeating gems, singing songs and doing finger plays.

“The USAID project is very good!” This sentiment was shared in the teachers’ and acting principal’s interviews. The acting principal and the teachers are making efforts to implement the project as best as they can. The project resources are widely used, and the students interact with them well. To improve the reach of the project, teachers recommended that project teams train all teachers and not just the resource teachers.

CASE STUDY REPORT 3: NEW FOREST PRIMARY & JUNIOR HIGH & INFANT SCHOOL

The Region

New Forest Primary & Junior High & Infant School is a high-performing non-CBSI school located in the parish of Manchester, in west-central Jamaica. The school is located about two hours from Mandeville, the parish capital. The drive from Mandeville passes through agricultural lands full of orange and grapefruit trees. Other small cash crops include ackee, avocados, melon, pimento, “Irish” potatoes and sweet potatoes.

The region is best known for bauxite mining, one source for commercial alumina. The first mining facility, Kaiser, opened in St. Elizabeth in the 1950s and continued production, as ALPART, until 2009 when it was closed due to reduced demand during the global recession. As a result, many jobs were lost, and families in this neighborhood now struggle to make ends meet.³⁵

New Forest was selected as a high-performing case study school because it has a demonstrated a history of excellence in the Grade 4 Literacy and Numeracy Tests. It is not designated as a Caribbean Basin Security Initiative (CBSI) school as it does not fit the eligibility criteria for that program.



Figure 4: New Forest Primary, Junior High and Infant School

The School

At New Forest, 35% of the students receive subsidized food through the PATH program, which serves students in the infant through junior high schools. New Forest is a large school that enrolls students in the infant school, ages 3-5; primary, ages 6-12; and junior high, ages 13-14. The following table breaks down the number of students enrolled at each schooling level.

³⁵ Porter, A.R.D. (December 12, 2011). “Manchester – what prospects now and after bauxite? The Gleaner.” Retrieved from: <http://jamaica.gleaner.com/gleaner/20111218/focus/focus7.html>.

Table 7: New Forest school enrollment by level and sex

	Infant	Primary	Junior High	Total
Boys	35	335	146	516
Girls	39	307	108	454
Total	74	642	254	970

Each grade level carries four classes, with some specialty classes included. For example, there is a specially designed class for boys in Grade 3. Evaluators observed class sizes ranging from 17 to 36. The enrollment of boys both in the primary and junior high school is higher than that of the girls. Since primary and junior high share facilities, the school operates on a split session shift system. The infant and primary students attend school in the morning beginning at 7am and finish at 12pm. The junior high begins at 12pm and ends at 5pm.

The school buildings are well painted and the grounds are free of trash and are well kept. At least six buildings of various sizes house the classrooms. They have sufficient light and reasonable space; the classes are not overly crowded. Teacher-made, student-made and commercially-produced charts are visible on the classrooms' walls. None of the classrooms has a computer, but a few desktop computers with Internet connections were observed in use in the teachers' lounge and principal's office.

New Forest is a high-performing school in Jamaica, as demonstrated by its 91% mastery level in the 2011 Grade 4 Literacy Test. Outstandingly, two students were awarded national government scholarships in the 2011-2012 Grade Six Achievement Test (GSAT) as a result of their exemplary performance. This achievement is a rare occurrence for any school.

The principal explained that when he began teaching at this school in 1988, mastery on the G4LT was at 61%. Student mastery has continued to rise over the years, although he is a bit disappointed in the 2012 scores, as only 88% of the students exhibited mastery in reading and 58% in mathematics. Although mathematics is up from 41% in 2009 when he became principal, the scores are still not where he would like to see them.



Figure 5: Students honored for achievement

The Parent-Teachers Association (PTA)

Seven PTA members, mothers and grandmothers, shared insights about the school. First, they explained that there is a “big PTA” and “small PTAs” at each grade level. They explained that the smaller groups are more active because they call each other regularly. The principal said that the smaller PTA groups are a way to reach out to get more parents involved as some don't feel comfortable in the larger group. The big PTA meets every first Monday. One grandmother explained that many parents, especially the females, work in the market where they sell their produce, so it is difficult for them to be involved in school activities during the daytime. The active parents “adopt” the children of the absentee parents to engage all the children and avoid any child feeling left out. The parents reported that the class teachers call them regularly; they

have all of the parents' phone numbers. Fathers are not very active in the PTAs. At least 10 males attended the PTA prior to the interviews, when the police presented on community safety.

Parents said that they try to reinforce what the teachers do in class. They reinforce reading at home by singing songs with their children, reading bedtime stories and talking about books they read. The parents highlighted their pleasure that their children often transition between the infant program and Grade 1 as readers. Parents explained that learning to read is different now from when they were in school because children learn about the sounds of letters and syllables. Sometimes, students stay after school to get extra help from teachers, parents and other students with reading. This helps them prepare for the Grade 3 Diagnostics Test and the Grade 4 Literacy Test. Parents either receive the school bulletin that



Figure 6: Active infant class

tells them when the tests are going to be given, or they hear it from the teachers when they go to school to receive their child's school report each term. When asked if they think the test and the standards set by the Ministry are too low or too high, one parent said that she thought the standards are too high. She said that the Grade 4 literacy exam is harder than the Grade 6 exam. She also said that she thinks the test should match the curriculum much better.

The Principal

Higher standards do create challenges at all grade levels for the principal. The principal explained that the infant program prepares students for first grade, so the teachers observe children carefully at this point to be sure they

are ready for Grade 1. If they are not, the principal checks their birthdays and sometimes holds them back for a year (especially the boys). He explained that many of the boys don't have a father in the home, so they are allowed to play and not expected to stay on task, whereas the girls are expected to help their mothers with tasks in the home. As a result, the boys are sent out to play, thus they are used to a lot of physical activity and have short attention spans when tasks are presented to them. These behaviors carry over to school work.

Aware of the learning challenges that young boys have, the principal has established an all-boys Grade 2 class for 25 boys who are identified as struggling readers. Both the guidance counselor and a vice principal help in the special classes to ensure that the boys are making progress. By the end of Grade 2, all are mainstreamed and ready for regular class instruction. A similar program was established at Grade 4 that provides extra instruction. Both programs use Jolly Phonics, which the school purchased on the recommendation of other USAID (CBSI) project schools that found it successful for reading instruction. Interventions are set up at a variety of points in a student's school career to assure success. With the shift system, some small group instruction can occur outside the normal class time, which is needed given the shortened instructional day.

To better serve both shifts of students and teachers, a vice principal is designated for each shift. The principal describes himself as an instructional leader whose main task is to be a literacy and numeracy supervisor. He believes that there are two types of leaders, transformational and transactional. For him transactional leadership is most effective, as it focuses on a team working together for success.

“Everyone on the leadership team knows what is supposed to happen in the school and when,” he explained. This assures continuity in the instructional program, as vice principals also monitor and guide teachers in the classroom. “I share all of the training that I receive with my team.” He has combined what he has learned through the USAID principal training with his participation in the “Learning Community Program” collaboration between MOE and Canadian International Development Agency (CIDA). He explained that each grade level has a designated leader, allowing for supervision to be closer to the classroom. This way, the community sees other leaders on the school campus, not just him. The principal is viewed as a leader, and he has been nominated for the “2012 Principal of the Year Award” for Region 5.

Ministry of Education Regional Office

The principal considers the staff at the Ministry of Education Region 5 Office to be part of the school leadership team. Since the Region 5 office theme focuses on “children learning,” he feels that they are all working toward the same goal. There are education officers for both primary and secondary schools. In addition, there is a Literacy Officer who visits and sends out a newsletter with helpful hints about teaching reading. In Region 5, there are six school clusters each with 25 schools. The principals meet on a monthly basis and often share best practices. The education officers interface directly with the principals on school management issues: For example, schools will bring data to discuss how to improve performance, and will conduct in-house training. In Region 5, the six primary school education officers cover 171 schools, 133 public and 38 independent schools.

At New Forest, the education officer visits about once each term and does weekly follow-up via the telephone. During these conversations, they discuss what the principal ‘observes in the classrooms’ from a management perspective, and how the teachers are implementing the training received. The senior education officer said that even without a formal evaluation, “the trickling down effect of the USAID project was beneficial in the schools.” He went on to say that “where (school) leadership was dynamic there were greater results.” Since the principal ensures follow through and sets aside time for workshops, he or she can also hold the teachers accountable for what they have been taught.

The Resource Teacher

The resource teacher at New Forest is a reading specialist by training and now teaches Grade 5. She attended all the USAID project training and provides training to all the other teachers in the school. She said “I liked the fact that the training provides good activities that matched the Revised Primary Curriculum. We would have felt a greater impact here at New Forest if there were resources to work with.” She stated that she conducts classroom observations whenever her students are doing their physical education classes or weekly sessions with the Guidance Counselor. She praised the introduction of standards and benchmarks into the literacy program at her school, noting that teachers at Grade 1-3 now write their lesson plans with both elements. Key strategies and resources that she observed being used by the teachers in her schools was guided reading using basal readers (Literacy 123).

In a group interview with 10 teachers, both lower and upper primary, one teacher said that training is not so much about what teachers learn as much as it is about how to implement it in the classroom. At New Forest, teachers said, the focus is on the interaction between the teacher and the student. As the principal says: “*Drop the Chalk!*” – Teachers must be engaged with students. These teachers liked the training but they thought it was hard for just one teacher to attend, since others may have instructional problems, which they would like to learn about more. They would like to keep the training, but with more resources provided to implement it, especially since they feel that they need more training on how to help slow learners. They would also like to receive certificates acknowledging their participation and have some credit attached to the training toward their registration or teacher certification.

The Classroom

The evaluation team observed four classrooms in Grades 2 and 3. The students in all classes were very alert and assertive. They spoke Standard Jamaican English when responding to their teachers' questions and even to their peers. The lessons utilized local and foreign fictional reading materials, based on high interest content: "The Bun Shop," "Sh!! (A story about farm animals)," "Finley and the Football Team" and "Dwight's New Name." In all four classes, students had reading material on their desks, not worksheets or exercise books.

The teachers' lesson plan books revealed plans for reading for the week and included benchmarks. They were aligned to reading standards written by the Project. Lesson activities were outlined clearly, and assessment of students' learning was ongoing throughout the intended lesson. The teachers presented very active lessons, and the children were engaged every step of the way. Children read individually and in groups, they were questioned, they responded, they asked questions, they created hypotheses and they assessed themselves and their peers. The teachers were quite facilitative in their actions: They allowed wait time for responses, redirected questions, insisted on fluent reading to guide comprehension of texts and moved around the rooms while they taught. The lesson in one Grade 2 class ended due to the ringing of the break bell; however, the children were so engrossed in the activities that the teacher had to send them outside to eat.

The rooms were both print rich, with many reading resources found around the rooms. The charts on the walls were bold and carried information related to the different subjects that they studied each day. Learning centers featured prominently in all classes as well. Generally, the classrooms are spacious, with enough room for learning areas and storing resources. Classroom libraries or reading corners are clearly labeled in the classrooms and a plethora of reading materials is evident. The classrooms are enclosed and carry-over noise is significantly reduced between rooms.

CASE STUDY REPORT 4: PADMORE PRIMARY SCHOOL

The Community: The challenges of a rural community in an urbanized setting

Padmore District is located in deep rural St. Andrew in an area known as Above Rocks and includes the communities of Good Hope and Industry Grove. The district's 'ruralness' is unique in at a distance of 25 kilometers on a winding road from downtown Kingston, Above Rocks overlooks the bustle of central St. Andrew and Kingston and is therefore heavily influenced by the urban context, while being submerged between the thorny hills of St Andrew and St. Mary.

The district adjoins the affluent suburbs of Red Hills, and many of the local economic activities are based on small subsistence farming and shop-keeping. Otherwise, the population is comprised largely of unskilled workers who commute for work in central St. Andrew and Kingston. According to the principal and other respondents, unemployment in the district is high,³⁶ and there is not industrial activity in the immediate local area. For this reason, residents by necessity rely on the economic activities and public services in central St. Andrew and Kingston. However, for many local residents, the cost of transportation is high and acts as a barrier to accessing these goods and services. Like many rural communities in Jamaica, Padmore is afflicted by bad road conditions, weak physical infrastructure, poor housing stock (although unlike inner city communities, the houses are not dilapidated), limited water and electric supply, and irregular waste management services.

According to the principal, about sixty percent of the students come from outside the immediate community, from neighboring, more urbanized areas closer to Kingston such as Red Hills, Rock Hall and Belvedere. Although the school has a majority of students from outside the Above Rocks area, the principal indicated that parents in the local community prefer to send their own children away from Padmore to high performing schools in Red Hills, which is over 5 kilometers away, and even much further afield such as Constant Spring, which is more than 20 kilometers from Above Rocks.

The School

Padmore Primary is an extra-small, co-educational school nestled in the hills of West Rural St. Andrew. Although funded and supported by the Ministry of Education as a public institution, the school is owned by the Anglican Church. Seventy-five students are currently enrolled in the school – this is up from an average enrollment of 45 between 2009 and 2011. The school is staffed by two trained teachers: the principal (who also has a teaching role), a volunteer teacher, a cook (who also doubles in an administrative role), and a cleaner.

³⁶ The Statistical Institute of Jamaica does not provide unemployment indicators on a district or community level. The Principal supposes that about 90% of the community is currently unemployed. However, given widespread subsistence farming activities, it is more likely that persons are under-employed.



Figure 7: Students at Padmore Primary School

The school has a multi-grade classification. Grade 1 has 22 students and is taught separately by the volunteer teacher. Grades 2 and 3 (21 students) are merged and taught by a wheel-chair bound, trained teacher. Grades 4, 5 and 6 are a single class of thirty-two (32) students taught by the teacher who was trained by the project. The school has recently gone through a change of leadership, and the new principal is on a drive to increase student enrollment to fill the school's capacity of 200. As a result of low levels of enrollment, the school has two large, fully furnished classrooms that are unused for teaching. The principal is also making determined efforts to raise achievement and change the image of school. Padmore Primary is *not* a part of the cohort of Caribbean Basin Security Initiative (CBSI) project schools.

The Two Principals: Contrasting approaches to instructional leadership

The evaluation team interviewed both the current and previous principals at Padmore. The previous principal suggested that the context of the community was an important factor in both the underachievement of children at the school as well as in the school's social environment:

“The deep rural nature of Padmore seems to work against the school. The children seem unaware of things that they should be aware of. The community is largely a farming community specializing in rearing livestock, growing sorrel, gungo peas and peasant farming. The community is close-knit by family or genetic ties. They don't get along well, though, and these feuds are brought into the school. Forty-five students were in the school when I first got there and all were related to each other! There is a high incidence of incest and in-breeding, which poses learning challenges for the students because of the constant distraction that exists when the feuds spill out in the community.”

She indicated that given the low levels of adult literacy in the school, the leadership of the school had offered literacy classes to the adults, but only three persons took up the offer. Apart from this there were no other interventions offered by the school to the community.

The evaluators ascertained that Padmore had been actively engaged by the project under the previous principal, and that she had received mathematics training through the project. Evaluators also learned that the current upper-grades teacher had also received project training in literacy. Although the former principal was unable to recall the specific nature of the workshops, or whether they were useful for teaching, she did point out that the teacher who was trained by the project in the literacy strategies did not provide in-school training for other teachers:

“The designated reading resource teacher was defiant. She said that she did not want to go to the training and she had not implemented any of it while I was there. There was no one else to attend the workshops. This issue almost became a legal matter.”

The current principal, who has been in her post for one year, appears to have taken a much more aggressive approach to managing the school, including having a very visible presence in classes and playing a “hands-on” roll in teaching and learning. She says about her instructional leadership style:

“I don’t leave learning to chance, I ‘mother-hen’ my classes to ensure that the children are learning. I do model teaching to give [teachers] the confidence that they need to teach things that they are not comfortable doing.”



Figure 8: Classroom at Padmore Primary School

Prior to the current principal taking up her present position, the 2010 National Inspectorate Report on the school’s effectiveness indicated that leadership of the school was weak and failing. The report was particularly damning in the areas of instructional leadership and school improvement:

“The principal’s instructional leadership is narrowed down to random checks of lesson plans, visits to some planning sessions, observations of a few lessons unnoticed, and team teaching at times as she is a teaching principal ... The school has no clear agenda for academic improvement, neither is there a realistic view of its strengths and weaknesses.”

The interviews with both principals revealed that there was no real handing over or transition planning between the departure of the previous principal and the current principal. When the team made inquiries about Padmore's participation on the project, the current principal indicated that she knew nothing of the project.

She has, however, embarked on a comprehensive in-house training program to teach reading. She refers to herself as a "reading specialist," and stated that she was trained at the Mico University College and has extensive experience and success of teaching reading at the primary level. She indicated that she did not see any literacy strategies being used by the teachers when she came into the post, although literacy was a big problem at the school. As the root causes, she highlighted the teachers' "lack of know-how" in teaching reading and the absence of adequate reading materials. She has indicated that teaching reading and improving teachers' capacity to do so is an important plank in her thrust to improve students' attainment and change the image of the school. When the principal was asked about the teaching of reading in the school, she indicated an iterative approach of assessment and intervention:

"We did our reading test using the Dolch list³⁷ to determine the reading levels. We document it and provided scaffolding and the kids with reading difficulties were placed in the reading club. At the end of the term we tested the students again to see how they improved. We also now teach reading as a subject, and a lesson plan is written for it. Reading corners are in each of the classrooms, too."

In addition, she said that they also use the following strategies:

- Drop Everything and Read (DEAR)³⁸
- Teach reading as a subject (reading is timetabled to be taught every day)
- Reading lesson plans
- Individual assistance to slow learners
- Reading club
- Weekly workshops and demonstration lessons for teachers' professional development

The current principal hastened to point out that these interventions were the result of her training and experience, rather than an outcome of the project or other support from the MOE. When asked what challenges she faced in relation to improving literacy levels, she said that the main challenge was one teacher with 18 years' experience and a teaching diploma who has "not gone back for upgrading, so [she doesn't] know what's new out there." Another challenge was inadequate material resources. She noted that only 5 Language Arts books for each class are sent from the MOE.

The Resource Teacher

The project-trained resource teacher indicated that she had attended three workshops on the teaching of reading as well as sessions on how to timetable reading in the language arts curriculum. She described the approaches to teaching "onset, rhymes, beginning and ending sounds, syllabication" as "hands-on," noting that they "opened up [her] understanding that students learn based on their learning styles," and that she learned "how to build listening skills and use differentiation." She said that at the time of training she did employ some of the strategies with her Grade 2 and 3 class and continues to do so with her current Grades 4 through 6 class. She did indicate more active training of other teachers under the new principal, in that she said that she has been sharing teaching strategies with her colleagues in the Thursday evening workshops on organized by the current principal.

³⁷ The Dolch Word List is a list of frequently used words compiled by Edward W. Dolch and published in 1948. Dolch was a proponent of the "whole-word" method of reading instruction in the lower grades.

³⁸ A strategy employed by the predecessor USAID primary education program, called Expanding Educational Horizons.

Teaching and Modeling Reading

Padmore's "troubles" with teaching reading are not unlike the situation that many schools in Jamaica face. The results of the Grade 4 Literacy Test have highlighted the extent to which many schools have simply "not gotten it right." Teaching reading is therefore a critical imperative for schools like Padmore. The National Education Inspectorate (NEI)³⁹ Report (2010) also pointed out that "progress in English at the school is unsatisfactory":

"...students display limited knowledge of letter and composition writing, comprehension skills and grammar, but are able to identify pairs of rhyming words".

The report identified a teacher-directed, whole class approach as the main culprit for students' unsatisfactory performance (NEI, p. 8). The inspectors also pointed that there was little evidence of "language arts content such as: grammar, story writing and comprehension". However, the evaluation noted that the classrooms were literature rich, with reading corners in all the classrooms. In addition, there were exhibits of students' work in literacy posted on the walls.

An examination of Ministry data for Grade 4 Literacy Test (G4LT) and the Grade Six Achievement Test (GSAT) between 2009 and 2011 shows that student attainment in literacy at Padmore has varied during the period. The small number of students entering the tests means that the use of percentages masks the real situation. The table below illustrates the outcome for students in the G4LT and GSAT, 2009-2011:

Table 8: Number of Padmore students achieving mastery in the Grade 4 Literacy Achievement Test

Year	Number of Students Sitting the Test	Number of Students Achieving Mastery	Grade 4 Enrolment	Grade 4 Enrolment as a Percentage of the total School enrolment
2009	8	5	9	20%
2010	7 ⁴⁰	5	4	10%
2011	7	2	7	14%

2011 was clearly the worst year for Padmore in the G4LT, but the previous years, 2009 and 2010, show somewhat better outcomes for students. Given the small number of students sitting the test, the expectation is that extra small schools such as Padmore would be in a good position to provide individual instruction and easily achieve 100% mastery. Moreover, because of its small size and multi-grade arrangement, Padmore could use differentiated instruction to provide individual attention to students.⁴¹ However, the 2010 inspector's report pointed out that this was not the case, even though

³⁹ The National Education Inspectorate (NEI) was established "to address the issue of performance and accountability in the education system" (www.cabinet.gov.jm/current_initiatives/ministry_education). It is one of three agencies recommended by the Task on Education Transformation, 2004.

⁴⁰ Based on the Grade 4 enrollment, it is likely that the three additional students were those students that did not achieve mastery in 2009.

⁴¹ Differentiated instruction involves strategies to assist students to learn content and to help them process and make sense of ideas. Under this approach, teaching materials and assessment measures are developed in order to help all, regardless of differences in ability, to learn effectively. See, for example, Tomlinson (2001).

Padmore is a multi-grade school. The evaluation team also noticed that Grade 2 and 3 students were placed in the same ability groups, with little accounting for grade level expectations. The resource teacher said that the multi-grade arrangement was the biggest challenge to teaching reading in this context:

“In the multi-grade setting it’s hard, you can come with your own strategies, making up songs but you can try so many things but you need to keep grabbing and keeping students attention, but if you have students from Grades 4 to 6, then they already know songs, you have to keep coming up with new things.”

Table 9: Padmore - Average percentage score on GSAT Language Arts

Year	Number of Students sitting			Average Percentage Score for Boys	Average Percentage Score for Girls	Padmore’s overall Percentage Score	National Average
	Boys	Girls	Total				
2009	8	3	11	43%	39%	42%	54%
2010	1	-	1	53%	-	53%	54%
2011	4	2	6	32%	62%	42%	55%

Gender differentiation

Similar to the G4LT, the GSAT sittings from Padmore are quite low, with only one student from Padmore student sitting the test in 2010. Examination of the results shows that over the period, more boys have sat the test than girls, with the average scores of most boys below the national average. Although we are unable to draw any statistically reliable conclusions from such small numbers of students, evaluation field notes did show that some boys in the Grade 2 and 3 class appeared disconnected from the lesson and were given little attention by the teacher; rather, the evaluator’s observation of the interaction between the students, the teacher and principal showed that the teacher appeared most concerned about constraining the movement of some of the boys and making sure they remained in their seats.

Notably, the evaluators did not observe any particular attempts to differentiate instruction between boys and girls in the language arts class in both Grade 1 and Grades 2 and 3. What was observed was whole class approaches directed by the teacher, with use of the blackboard. For example, the Grade 1 teacher was quizzing students, using cue cards. And the Grades 2 and 3 teacher used a past question paper to quiz students as well.

Relationship with the Ministry of Education

Both principals said that they have had very few visits from the education officer (EO). Specifically, the previous principal suggested that the relationship with the EO was “cold and distant.” From her description, it appears that she had made several attempts to contact the EO and the Ministry without much success. Follow-up discussions with the current principal and the resource teacher revealed that a new EO was now in place, but as yet they have not had a visit for the current term. Like other schools, the relationship with the MOE impacts the level of resources the school has access to. Both principals hinted at limited access to resources due to the inadequate number of visits by the EO. Moreover, it

appears that given the number of visits, there is also limited supervision of the school, including monitoring and evaluation of teaching and learning. The current principal indicated that she was in the process of developing a school improvement plan, without any contribution from the EO.

The case of Padmore Primary points to the need for closer supervision for small schools, not only to ensure the sustainable implementation of projects, but also to enhance the quality of teaching and learning and the effectiveness of teachers. Padmore, like some other schools, sometimes falls outside of the purview of mainstream accountability mechanisms. Moreover, the struggles of this school are compounded by the multi-grade arrangement. As implied by the current principal, achieving improvement will require the efforts of all the stakeholders – the challenge, of course, is in galvanizing the relevant parties and bridging the present gaps in relationships, including community relations. This will require inspirational and transformational leadership.

APPENDIX IX: SCHOOL PROFILES

School Name	Gender	School Organisation	Locale	% Attendance	Capacity	Enrolment	Ratio * Cap/Enrol	No. of Teachers	** Pupil Teacher Ratio
Effortville Primary	Co-ed	Whole Day	Urban	82	235	386	1.6	17	30:1
Hatfield Primary & Junior High	Co-ed	Shift	Urban	80	870	994	1.1	52	22:1
Holy Family Primary and Infant	Co-ed	Whole Day	Urban	82	1,280	1,090	0.9	39	30:1
Lucea Primary	Co-ed	Whole Day	Urban	77	505	1,135	2.2	39	32:1
Mount Angus Primary & Jr High	Co-ed	Whole Day	Rural	81	525	298	0.6	14	23:1
New Forest Primary & Jr High & Infant	Co-ed	Shift	Rural	n/a	1,200	1,214	1.0	49	28:1
Old Harbour Bay Primary	Co-ed	Whole Day	Urban	72	770	691	0.9	27	31:1
Padmore Primary	Co-ed	Whole Day	Rural	77	115	45	0.4	4	15:1
St. Mary's All Age	Co-ed	Shift	Urban	80	340	518	1.5	24	26:1
Sudbury AA	Co-ed	Whole Day	Rural	80	395	394	1.0	16	28:1

(MOE 2008 – 2009)

APPENDIX X: EXAMPLES OF REGIONAL ORGANIZATIONAL STRUCTURES

The organizational structure of Region 4

In Region 4, the deployment of education officers is arranged on the basis of the quality education circle (QEC), which is further divided into geographical clusters. All education officers are then allocated to supervise across all schools within a particular geographic area, at both primary and secondary level (see diagram below). In this case, the QEC serves a dual function, as both a hub for *quality assurance* in teaching and learning as well as for the *oversight* of the management of schools. In this region, the education officers view themselves as “school improvement officers” and directly work with schools in the development of their school improvement plans.

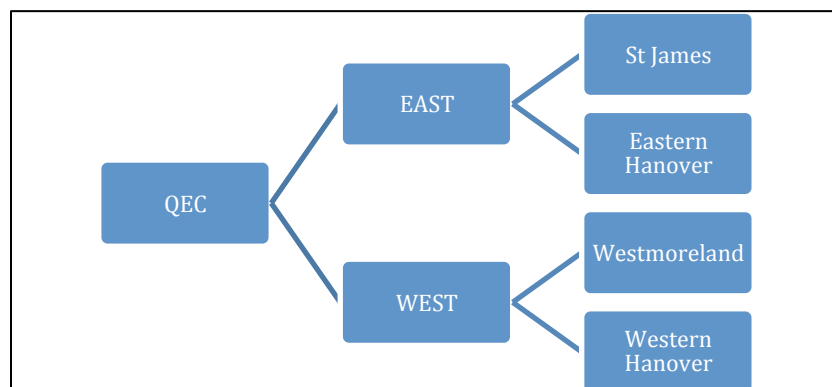


Figure 9: Structure of the quality education circle

The eight education officers in Region 4 supervise on average between 16 and 22 schools. In this region, one of them has the title of “community relations education officer,” and oversees all projects, including the USAID Basic Education Project and acts as the liaison between projects and the region. Moreover, the QEC/clusters meet on a monthly basis to plan and decide on a particular focus for the month. This means that in some months the project schools are given a singular attention. The central role of the QEC in the region means that education officers are drawn closer to the operations of the schools, thereby placing them in a position to gain greater insight into the needs of the schools, and specific ways in which performance may be improved through direct consultation with individual principals and through the clusters of principals.

In contrast, Regions 1, 5 and 6 are organized on the basis of geographical clusters to ensure that the supervision of schools is in the hands of education officers. This is in line with the mandated role of education officers.⁴² As such, clear distinctions were made between primary and secondary education officers.

⁴² The core functions of education officers are: curriculum development, assessment and evaluation of student performance, supervision of schools operations (Task Force on Educational Reform – Final Report, 2004).

In Region 5, where six primary education officers supervise 133 public schools, there is a distinction between the roles of QECs and geographical clusters. In that region, there are 8 QEC's and 6 clusters. The QECs are used as what education officials called a "management mechanism." There, the education officer is the convener for a given QEC, meeting once per term to discuss matters relating to schools' performance based on available school data, which are used as the basis for planning appropriate interventions. The six geographical school clusters meet on a monthly basis, where the education officers meet with the group of principals to discuss performance, share practices and conduct in-house training.

Similarly, in Region 6, where there are 12 QEC's convened by 11 education officers, the QEC has a secondary role and is separate from the oversight of schools. Education officers manage the QECs and the clusters as separate entities. This means that given the spatial distribution of schools in the regions, education officers may convene a QEC that does not include the schools they supervise. There is therefore a dual role for education officers, which separates their function as "school supervisors" and their role as a convener. Region 1 officials described their region as being "in transition from an organizational structure where the QEC and the geographical clusters were jointly defined," to a structure where a "clear distinction is made between the two." In the new structure, the QEC is referred to as "a professional learning community to share successful practices." This definition does not include the supervision of schools and is seen as a separate activity from overseeing school operations.

Inevitably, such structures as adopted by Regions 5 and 6, and the direction that Region 1 appears to be moving toward, have the potential to a duplication of effort, which limits the extent to which they are able to provide in-depth support to individual schools. It also means that while all schools may be assigned an education officer, not all schools receive adequate supervision from their assigned officer. Although the evaluation team did not have the resources to conduct an in-depth structural analysis of the Ministry's regional system, evaluators found the separation of the QECs from geographic clusters to be counterproductive, in that a different education officer might be responsible for a QEC in one local area and a geographic cluster in another. Indeed, such a system appears to exacerbate the problems of limited manpower, and to potentially prevent education officers from having the type of intimate connections necessary to allow them to act as agents of reform or to provide the monitoring support for the types of innovative classroom practices advocated by the project.

In Regions 5 and 6, there is a clearly defined role specialization among EOs. In Region 6, EOs are defined as either primary or secondary and work directly with principals who are responsible for supervising teachers. This means that education officers are focused on oversight of school management, rather than facilitating teaching and learning. There are important differences between the roles of EOs in these two regions, however. Although EOs in both Regions 5 and 6 specialize by school type (primary or secondary) unlike the EOs in Region 6, EOs in Region 5 were more involved in working directly with classroom teachers as well as in school management.

APPENDIX XI: BASELINE DATA ANALYSIS

Table 10: 2010 baseline data sample of schools

	CBSI Schools	Non-CBSI Schools	Total
Schools	8	18	26
Male students	138	307	445
Female students	152	273	425
Total students	290	580	870

Table 11: 2010 Grade 2 reading performance comparisons

	Mean Score^a	Standard Deviation	t^b
CBSI (all)	4.20	2.20	1.99*
Non-CBSI (all)	4.60	1.90	
Girls (all)	4.87	1.77	4.14*
Boys (all)	4.06	2.14	
CBSI boys	3.82	2.29	1.15
Non-CBSI boys	4.20	2.05	
CBSI girls	4.56	2.14	1.80*
Non-CBSI girls	5.02	1.54	
CBSI girls	4.56	2.14	1.92
CBSI boys	3.82	2.29	
Non-CBSI girls	5.02	1.54	3.72*
Non-CBSI boys	4.20	2.05	

a: The ERAI measures reading performance on a 7-point scale ranging from: 1 (below pre-primer), 2 (pre-primer), 3 (Primer), 4 (Grade 1), 5 (Grade 2), 6 (Grade 3), and 7 (Grade 4).

b: * (p ≤ 0.05)

Table 12: 2011 sample characteristics

	CBSI	Non-CBSI	Control	Total
Schools	10	19	23	52
Male students	299	531	569	1399
Female students	312	501	544	1357
Total students	611	1032	1113	2756

Table 13: 2011 Grade 2 reading performance comparisons

Grade 2: 2011	Mean Score^a	Standard Deviation	t^b
CBSI (all)	2.98	1.90	1.51
Non-CBSI (all)	3.10	1.60	
Girls (all)	3.58	1.74	4.22*
Boys (all)	2.77	1.67	
CBSI boys	2.98	1.79	1.55
Non-CBSI boys	2.66	1.58	
CBSI girls	3.58	1.73	0.47
Non-CBSI girls	3.49	1.48	
CBSI girls	3.58	1.73	2.41*
CBSI boys	2.98	1.79	
Non-CBSI girls	3.49	1.49	5.06*
Non-CBSI boys	2.66	1.58	

a: The ERAI measures reading performance on a 7-point scale ranging from: 1 (below pre-primer), 2 (pre-primer), 3 (primer), 4 (Grade 1), 5 (Grade 2), 6 (Grade 3), and 7 (Grade 4).

b: * ($p \leq 0.05$)

COMPARISON OF 2010 AND 2011 ERAI RESULTS

Table 14: Summary of 2010 and 2011 student reading performance (non-CBSI)

	2010				2011			
School Type	GRADE	Mean	N	Std. Dev.	GRADE	Mean	N	Std. Dev.
non-CBSI	1	4.04	271	2.228	1	2.2	332	1.2
	1 (boys)	3.5	119	2.2	1 (boys)	1.9	176	1.1
	1 (girls)	5	150	2.2	1 (girls)	2.4	156	1.2
	2	4.62	268	1.856	2	3.1	354	1.6
	2 (boys)	4.2	126	2.1	2 (boys)	2.7	176	1.6
	2 (girls)	5	141	1.5	2 (girls)	3.5	178	1.5
					3	3.5	333	1.7
					3 (boys)	3.1	170	1.7
					3 (girls)	4.0	163	1.63
		Total	4.3	539	2.1	Total	2.9	1019

Table 15: Summary of 2010 and 2011 student reading performance (CBSI)

	2010				2011			
School Type	GRADE	Mean	School Type	GRADE	Mean	School Type	GRADE	Mean
CBSI	1	3.5	127	2.4	2	2.4	205	1.3
	1 (boys)	3.3	60	2.5	1 (boys)	2.3	101	1.3
	1 (girls)	3.7	67	2.3	1 (girls)	2.6	104	1.2
	2	4.2	135	2.2	2	3.3	208	1.8
	2 (boys)	3.8	63	2.3	2 (boys)	3.0	99	1.8
	2 (girls)	4.6	72	2.1	2 (girls)	3.6	109	1.7
					3	3.8	191	1.9
					3 (boys)	3.3	99	2.0
					3 (girls)	4.2	92	1.8
	Total	3.9	265	2.3	Total	3.2	604	1.8

Table 16: Summary of 2010 and 2011 student reading performance (combined CBSI and non-CBSI)

	2010				2011			
School Type	GRADE	Mean	School Type	GRADE	Mean	School Type	GRADE	Mean
Combined (CBSI and non-CBSI)	1	3.86	401	2.284	1	2.3	898	1.2
	1 (boys)	3.4	179	2.3	1 (boys)	2.1	460	1.2
	1 (girls)	4.2	2.7	2.2	1 (girls)	2.5	438	1.3
	2	4.48	403	2.000	2	2.8	928	1.7
	2 (boys)	4.1	189	2.1	2 (boys)	2.8	460	1.7
	2 (girls)	4.9	213	1.7	2 (girls)	3.5	468	1.6
					3	3.7	887	1.8
					3 (boys)	3.2	453	1.8
					3 (girls)	4.1	434	1.7
	Total	4.2	804	2.167	Total	3.0	2713	1.7

APPENDIX XII: LIST OF INDIVIDUALS AND ORGANIZATIONS CONTACTED

Ministry of Education HQ

Ms. Grace McLean, Permanent Secretary

Mr. Clement Radcliffe, CEO

Mr. Maurice Smith, Assistant to CEO

Ms. Dasmine Kennedy, SEO, Primary

Jamaica Teachers Council

Dr. Winsome Gordon, CEO

Peace Corps

Ms. I. Davis Pearson

Ms. Susan Walden

Jamaica Basic Education Project Staff

Dr. Jean Beaumont, Chief of Party

Ms. Oneice Grant

Dr. Doreen Faulkner, M and E Specialist

Dr. Melody Williams

Region I

Region I Ministry of Education Offices

Ms. Russell, Education Officer

Ms. Welch, Education Officer

Ms. Townsend, Education Officer

Ms. Elaine Roulston, Education Officer (phone interview)

Holy Family Primary

Miss L. Cecille Palmer, Principal (phone interview)

Ms. Avis Walker-Gordon, Vice Principal

Guidance Counselor

Ms. Moore, Grade 1 and Resource Teacher

Grade 1 Teacher

Mrs. Huier, Grade 2 Teacher

Miss Veronica Graham, Grade 3 Teacher

Group Discussion with 13 teachers

Padmore Primary

Julie Jackson (previous principal)

Keisha Hayles (current principal)

Resource Teacher

Region 2

Mt. Angus Primary and Junior High

Viola Jones, Principal

Resource teacher

Group interview with 3 non-resource teachers

Yallahs Primary

Vice Principal

Guidance Counselor

Grade 1 Teacher

Grade 2 Teacher

Grade 3 Teacher

Ms. Smith, Pull-out Reading Resource Teacher

Ms. Friend, Grade 3 Teacher

Ms. Paisley, Grade 3 Teacher

Group Discussion with 7 Teachers

Region 3

Unity PS

Mrs. Pauline White Anderson, Principal

Ms. June Campbell James, Grade 1 Resource Teacher

Ms. Kelsey Davis, Peace Corps Volunteer, Literacy Specialist

Region 4

Region 4 Ministry of Education Offices

Ms. Jennifer Francis, SEO for secondary

Ms. Vilma Miller, SEO for primary

Ms. Hyacinth Stern, Community Relations Education Officer

Ms. Kayla Clark, Education Officer

Ms. Yerma Haughton, Education Officer

Ms. Kaydeen Miles McLean, Education Officer

Ms. Leonie Hall Dunwell, Education Officer

Mr. Winfield Murray

Ms. Hillary Foster, Regional Director

Ms. Clover Kerr, trainer of teachers, coach

Lucea Primary

Ms. Stephanie Reid, Principal

Mrs. Black, Grade 2 Teacher

Ms. Nadeen Boyd, Resource Teacher # 1

Ms. Cheryl Craigie-Kerr, Resource Teacher # 2

Group interview with 10 teachers from Grades 1-3

Group interview with 7 parents and 2 guidance counselors

Sudbury Primary

Ms. Simms, Vice Principal/Acting Principal

Grade 1 Teacher

Grade 2R Teacher

Ms. Hylton, Grade 3 Teacher

Grade 4 Teacher

Group Discussion with 12 teachers

Region 5

Region 5 Ministry of Education Offices

Ms. Hilary Foster, Regional Director
Ms. Jennifer Francis, Senior Education Officer
Ms. Hyacinth Stern, Education Officer
Ms. Wilfred Murray, Education Officer
Ms. Yerma Haughton, Education Officer
Ms. Kaydean Miles McLean, Education Officer
Ms. Patricia Haughton, Education Officer
Ms. Leonie Dunwell, Education Officer
Mr. Andrew Miles
Mr. Orville Johnson
Ms. Sandra Buchanan-Murray
Mr. Rodrick Harley
Ms. Yvonne McLeod, SEO

Hatfield Primary

Joan McFarlane, Principal
Grade 2W Teacher
Grade 3P Teacher
Grade 2B Resource and Lead Teacher
Grade 3 Teacher
Group discussion with 7 teachers

New Forest Primary, Junior High and Infant

Mr. Arnaldo Allan, Principal
Mrs. Anderson, Vice Principal
Grade 2 Teacher
Grade 2B Teacher
Grade 3N Teacher
Grade 3J Teacher
Ms. Gracie Royal-Mowatt, Resource Teacher

Group interview with 7 PTA members

Group interview with 10 teachers

Region 6

Region 6 Ministry of Education Offices

Mr. Floyd Kelly

Effortville Primary

Ms. Dwyneth Blackwood, Acting Principal

Ms. Gordon, Grade 1 teacher

Ms. Lewis, Grade 2 teacher

Ms. Petula Edwards, Resource Teacher

Grade 2 Teacher

Grade 3K Teacher

Group Discussion with 6 Teachers

May Pen Community Interview:

Ms. Burrell, parent

Kareen Rowe, parent

Sophia Lee, parent

David Harris, parent

Dorete Davis, parent

Salome Bonton, parent

Christine Morgan, parent

Ann Marie Collie, parent

Avin Wallien, Citizen Security and Justice Program (CSJP), assistant community action officer, May Pen;

Antoinette, CSJP participant

School chaplain

Old Harbour Bay Primary

Mr. Wayne Thompson, Principal

Ms. Blake-Russell, Grade 1 Teacher

Ms. Melle, Grade 3 Teacher

Resource Teacher

Group discussion with 6 Teachers

St. Mary All Age

Doreen Reid, Principal

Ms. Jacquelin Brown-Hope, Resource Teacher and Grade 4

Grade 2 Substitute Teacher

Grade 1 Class Teacher

Grade 3 Class Teachers (2)

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Deliverables developed for the reading component:

- Camp Summer Plus 2011 Reading Curriculum
- Camp Summer Plus 2011 Reading Lesson Plans
- ERAC Early Reading Assessment Checklist Grade 1 Mar 2012 Master
- ERAC Early Reading Assessment Checklist Grade 2 Mar 2012 Master
- ERAC Early Reading Assessment Checklist Grade 3 Mar 2012 Master
- ERAC Teachers Instructions May 2012
- ERAI Administrators Manual 2012
- ERAI Stimulus Student Booklet A
- ERAI Stimulus Student Booklet B
- ERAI Student Response Booklet A
- ERAI Student Response Booklet B
- ERAI Training Outline may 2012
- Reading Cover page and Content
- Reading Leadership Workshop Module 1 August 2011
- Reading Module 1 Reading Standard and Strategies for the Effective Teaching of Reading
- Reading Module 1 Response Booklet
- Reading Module 2 Comprehension Part 1
- Reading Module 2 Response Booklet Comprehension Part 1 May 2012
- Reading Module 3 Early Reading Assessment Checklist – ERAC
- Reading Module 3 ERAC Response Booklet
- Reading Module 4 Comprehension Part 2 Response Booklet
- Reading Module 4 Comprehension Part 2
- Reading Standards and Benchmarks Version5 – RSB070212

Deliverables Developed by Technology Component 2011 – 2012

- Tech Module 1 Technology Integration
- Tech Module 2 Using the Internet
- Tech Module 3 Using PowerPoint to create instructional materials
- Tech Module 4 Electronic Portfolios for CA June 2012
- Tech Module 5 Using Excel to create quizzes June 2012

- Tech Module 6 Digital Storytelling May 2012

Other Project Documents

- JETP new school contact information revised. 14-02-2011 & 2011A
- Ministry of Education and List of Regional Offices. Updated June 2012.
- Appendix 1: JETP Schools Map & Appendix 2: CBSI List
- Memorandum of Understanding between USAID/Jamaica Basic Education Project and Ministry of Education: Terms of Reference USAID/Jamaica Basic Education Project and Jamaica Teaching Council.
- USAID/RCO Contract #AID-EDH-I-06-05-00033, Jamaica Basic Education Project, Mod 7 fully signed-1. January 7, 2010.
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APPENDIX XIV: NOTES FROM MEETING WITH USAID

Notes from the start-up meeting at USAID Jamaica on the Preliminary Evaluation of the Jamaica Basic Education Project

Monday, November 5, 2012

USAID Staff

Claire Spence, CTO, Director, Office of Sustainable Development
Jeanette Vail, Supervisory Program Officer
Tim Curtin, Education Development Officer

Social Impact and MSI Staff

Dr. Michael Midling (SI)
Dr. Deon Edwards-Kerr (MSI)
Janet Orr (SI)
Winsome Francis (MSI)

The Project

Ms. Spence explained that there have been some iterations of the project from an original 250 to 172, with 66 schools overlapping in these groups. Instead of working in all six of the education regions, the project has now focused its efforts on Regions 1, 6, and 4, and will be specially focused on areas of community renewal, with high rates of crime and violence. Mr. Curtin indicated that this represented a pivot toward safety and security as part of the US/Jamaica Country Strategy. Areas of Community Renewal, as identified by the Planning Institute of Jamaica (PIOJ) were areas of high unemployment, poverty, and crime.

The evaluation team will be visiting schools in all six regions and will continue to draw its random sample from the original 250 schools. However, Ms. Spence indicated that those schools that we are visiting that have been dropped might not be happy they are no longer in the Project.

The project began working with MOE in 2010, feeling that they were ready to be partners with the project as part of the educational transformation; and that the project now worked through MOE regional authorities.

Ms. Spence briefly reviewed the baseline ERAI data with the new team. The new project phase, consisting of 172 schools, is beginning with a new baseline. In this new phase, the project has gone back to working directly in schools, as had been done the predecessor Expanding Educational Horizons (EEH) Project.

The Jamaica Teaching Council (JTC)

The Jamaica Teaching Council (JTC) is an executive agency that licenses teachers in Jamaica. This week there is a regional meeting of the Jamaica Teaching Council (JTC) in Montego Bay. Dr. Gordon is the head of the JTC and will not return to Kingston until Friday. Many of the education officers and Ministry officials are also attending this meeting.

Generally, there is a one-year probation period before a teacher is granted tenure for life. JTC has supported Project activities whereas The Jamaica Teachers Association (JTA) with a membership of over 20,000 teachers has been somewhat resistant.

Research Questions

The research questions do not have to be answered in the same order as they are presently and can be compiled. Focus on year 2 of the project as these students have had two years of intervention from the project.


Evaluation Activities

Discussed shifting project priorities away from mathematics targeting only literacy to align with USAID priorities in Regions 1, 4 and 6.

Preliminary Evaluation Report

A preliminary evaluation report is due on Friday, November 16, 2012 to the CTO in advance of a stakeholders meeting and/or a meeting at USAID where the preliminary findings will be discussed. We are to use the normal report template for the preliminary report, just as for the final report. The preliminary report focuses on the highlights of the evaluation.

APPENDIX XV: PRESENTATION TO USAID AND STAKEHOLDERS



**MIDTERM PERFORMANCE EVALUATION
OF THE USAID/JAMAICA BASIC EDUCATION PROJECT
IN SUPPORT OF THE JAMAICA EDUCATION
TRANSFORMATION PROJECT**

PRESENTATION OF PRELIMINARY FINDINGS

**KINGSTON, JAMAICA
NOVEMBER 2012**

Policy Context

- USAID's Education Goal #1: Improved reading skills for 100 million children in primary schools by 2015
- USAID Jamaica's Country Strategy Priority
 - improved early grade (1-3) reading instruction and delivery systems
 - increased acquisition of foundation mathematics skills
 - greater engagement, accountability, and transparency by the educational system as a whole
- Vision 2030 Jamaica: A system for world-class education and training

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Background

- New Horizon Project (EQUIP 123)
 - Began 1998
- Expanding Education Horizons (BEP)
 - Began 2006

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Jamaica Basic Education Project

- Phase I: USAID Project advisors train Trainers of Teachers and Education Officers
- Phase II: Trainers of Teachers train Resource Teachers (Math and Reading) in 250 Project schools and other primary schools
- Phase III: Resource Teachers in 250 Project schools train Grades 1-3 teachers in their own schools

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Caribbean Basin Security Initiative (CBSI)

- Targeted 54 schools in crime-prone communities
- Instructional Resources (books and manipulatives)
 - Training for all 250 schools



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School Selection for the Evaluation

- Stratified random sampling method
- 12 schools representative of Project schools
- Accommodated shift Project emphasis to CBSI schools in Regions 1, 4 and 6.

Location	Performance	Resources
Rural	High	CBSI
Urban	Low	Non-CBSI

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Specific School Selection

School Name	Region	CBSI	Location
Padmore Primary	1		Rural
Holy Family Primary and Infant	1	✓	Urban
Mount Angus Primary & Junior High	2		Rural
Yallahs Primary	2	✓	Urban
Unity Primary	3		Rural
Sudbury	4		Rural
Lucea Primary	4	✓	Urban
New Forest Primary and Junior	5		Rural
Hatfield Primary and Junior High	5	✓	Urban
St. Mary's All Age	6		Urban
Effortville	6	✓	Rural
Old Harbour Bay Primary	6	✓	Urban

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- ### Evaluation Process
- | | |
|---|---|
| <ol style="list-style-type: none"> 1. Review of existing documents and data 2. Meetings with Project personnel 3. Development and field testing of data collection instruments | <ol style="list-style-type: none"> 4. School Visits/Data Collection <ul style="list-style-type: none"> ✓ class observations ✓ teacher group interviews ✓ resource teacher interviews ✓ principal interviews ✓ parent/community interviews (CS) |
|---|---|
- 8

5. Regional interviews

- ✓ Regional Directors
- ✓ Senior Education Officers
- ✓ Education Officers
- ✓ Trainers of Trainers

6. National MOE Interviews


- ✓ Permanent Secretary
- ✓ Senior Education Officer (SEO) for Primary
- ✓ Assistant to Chief Education Officer (CEO)



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Evaluation Question 1



To what degree are Resource Teachers implementing techniques learned through the Project?

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Resource Teachers (RT)

- Implementation varies considerably
 - Best when RTs attend all training sessions
 - Some principals elected to send different teachers to the training
 - Some RTs instruct higher grade students (4-6 or ASTEP)
 - Staff turnover and absenteeism
 - Knowledge base of the RTs
- Positive factors observed
 - Support of principals
 - Availability and use of materials
 - Intensity of interactions with EOs, project staff or trainers

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Question 1a

What factors influence teachers' decisions to implement or not implement new teaching techniques?



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Classroom Teachers

“Try everything” to find strategies most suitable for the lesson and their students

Who have a background in reading/literacy/ECE display greater willingness and ability to try new teaching techniques

Who received training from Project trainers vs. RT

Visited by their EOs or had principals and Resource Teachers providing support were more likely to implement

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Evaluation Question 2



A foundation of the project was the assumption that there is a *robust* enough education system for USAID to work at the regional level, enabling results to *trickle down* to the classroom level. Is this assumption valid?

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Regional Level

The organizational structure has an influence on implementation of Project strategies.

- Different organizational models

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graph LR; QEC --> EAST; QEC --> WEST; EAST --> StJames[St James]; EAST --> EasternHanover[Eastern Hanover]; WEST --> Westmoreland; WEST --> WesternHanover[Western Hanover];
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Region 4
Quality
Education
Circles

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Education Officer Roles

Roles & responsibilities vary across regions

- EO as inspector
- EOs as manager
- EOs as facilitator of teaching and learning
- EOs as SIP
- Distinctions between Primary & Secondary EOs

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National Level

- MOE partnership with the Project to implement
 - National language and literacy policy
 - Improve reading levels
 - Improve outcomes in Grade 4 literacy test
- Regional offices have a key implementation role
 - Pivotal role of education officers
- JTC embraces the role of the Project as strategies “empower” both MOE and teachers in reading and literacy
- But as yet,
 - ***“We are not seeing the kinds of results we want to see.”***

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Evaluation Question 3

To what degree has professional development training impacted school management at the classroom level?



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School Management and Instruction

- Some principals implemented school management training received through the project
 - Training on literacy strategies prior to RT training helped principals to support literacy improvement in the school
 - Support RTs to attend training and replicate training in their school
 - More support requested
- Leadership team consistency
 - Vice principals often serve as instructional leaders, some attended training, others did not

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Question 3a



To what degree are principals creating the environment to support the teachers to receive and implement training by project staff and their peers? What factors contribute to success or pose challenges?

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Differences among Schools

- Varied project implementation in schools
- Experimentation by some principals of leadership and instructional practices, for example
 - The timetable adjusted to stream reading by grade level
 - School-wide Drop Everything And Read (DEAR) time
 - Release time for some RTs to visit classes
 - Principals and the RTs ask teachers to record in a log their trials with new reading techniques
 - Sale of Jolly Phonics student workbooks to parents
- Principals' delegation of responsibility and authority to Vice Principals and Resource Teachers varies.

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Question 3b

To what degree are the six regional offices supporting the implementation and monitoring the training received by teachers in the regions that they supervise? What factors contribute to success or pose challenges?

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Regional Education Offices

- All are aware of the USAID Project
- All support the initiative in a variety of ways
 - Assist with logistics
 - Classroom visits
- Challenges
 - Workload/portfolio of EOs
 - Location of the school in relation to the regional office
 - Sometimes confusion about who is to pay for workshop costs

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Regional Education Offices (cont'd)

- Non-alignment between the Project's training days and the schedule for national training days.
 - EO's often not able to attend workshops and therefore not in a position to fully monitor the implementation of the techniques



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Evaluation Question 4

Is there a difference in grade 2 reading performance between schools that have been given resource materials and similar schools that have not?



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Variability

- At Grade 2, students in the CBSI schools have a mean reading score of 3.3 (**just above primer**), with a standard deviation of 1.8;
- This is similar to the non-CBSI schools where the scores range from 1.5 to 4.7. In other words, there is no real difference in the scores

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Overall Reading Level of non-CBSI and CBSI Schools

OVERALL READING LEVEL				
Schools	Grade	Mean	N	Std. Deviation
Non-CBSI	1	2.1592	333	1.18292
	2	3.0761	355	1.59000
	3	3.5345	333	1.69234
	Total	2.9265	1021	1.60803
CBSI	1	2.4126	206	1.26862
	2	3.2837	208	1.78326
	3	3.8187	193	1.94542
	Total	3.1582	607	1.77850

The scores are likely to range from 1.5 to 5.1. That is, from slightly above 'below pre-primer' to 'grade 2'.

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Question 5 – To Be Analyzed

Explain differences between baseline and project year 1 data.

- a. What were the challenges faced in determining the baseline data?
- b. Is the most recent baseline data an accurate representation of the true baseline?
- c. If not, what steps need to be taken to establish an accurate baseline data set?

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Preliminary Conclusions

Although there are variations in implementation the evaluation confirms that there is some amount of influence on practice at the classroom level

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Preliminary Conclusions - Classrooms



- Students with reading materials in hand are more likely to engage in the task of reading.
- Access to quality reading material supports literacy development.
- Proximity to high interest reading material engages young readers, especially boys

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Preliminary Conclusions – School Leadership

- High levels of implementation are strongly linked to quality instructional leadership.
- Professional development is critical to implementation of innovations.
- Schools where principals and teachers took ownership of the project both conceptually and practically demonstrated high levels of implementation.

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Preliminary Conclusions – Education Systems

- Implementation of techniques introduced in training varies by school and region.
- To the extent that the Project is aligned with the national language curriculum (Literacy 123), its impact is more likely to be sustainable.
- Ideal combination of leadership EO, Principal, Vice Principal and RT to support instructional change is most likely to result in the diffusion of effective literacy instruction.

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Discussion Questions

- Which findings do you find insightful and do you feel could be useful for instruction at your school?
- How best to schedule project training?
- What change in test scores (Grade 3, 4) should we expect to see at the end of two years of project implementation?
- **Other questions welcome!**

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Social Impact & MSI Evaluation Team

- Dr. Michael Midling, Team Leader
- Dr. Deon Edwards-Kerr, Education Evaluation Specialist
- Janet Orr, Basic/Higher Education Specialist
- Winsome Francis, Reading Specialist
- Paulette Dunn-Pierre, Evaluation Specialist
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