

ORGANISATION OF EASTERN CARIBBEAN  
STATES (OECS)  
EDUCATION REFORM UNIT

**Strategic Plan:  
2001-2010**

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## **OERU STRATEGIC PLAN**

### **1.0 OVERVIEW OF THE OECS EDUCATION REFORM**

#### **1.1 *Education Reform In The Eastern Caribbean***

The establishment of the OECS and its Secretariat provided a conducive environment to foster activities that aim at improving the quality of human resource within the sub-region. Similarity in size of population compared with the remainder of the Caribbean allows for a naturally cooperative approach to social development.

In 1990 the Council of Ministers of Education of the OECS countries decided that a long-term education reform strategy should be developed for the sub-region. Such a strategy would provide the basis for national development, the framework for sub-regional initiatives and a focal point for regional co-operation in education within the eastern Caribbean. It would also establish the broad parameters within which donor involvement and development co-operation would be sought and coordinated. These considerations coincided with the wider global interest in the provision of access and quality education in developing countries - EFA 1990.

In early 1991 the OECS Secretariat with financial assistance from the Canadian International Development Agency (CIDA), commissioned the OECS Working Group under the chairmanship of Professor Errol Miller of Jamaica to undertake the task of developing the reform strategy. The attempt at making a comprehensive analysis of the state of affairs in education included interaction with a broad-based constituency, and the decision to formulate a direction for education represented a sense of commitment to a process of cooperation by relevant stakeholders.

The Working Group developed a comprehensive document, the *OECS Education Reform Strategy: Foundation for the Future*, subsequently endorsed and approved by the Council of Ministers of Education and accepted by the Central Authority of the OECS. *Foundation for the Future* consists of 65 strategies, in nine broad programmatic areas:

1. Harmonization of the education systems of the OECS (strategies 1 to 8)
2. Reforming early childhood education (9 to 13), primary education (14 to 19),
3. Secondary education (20 to 26), tertiary, adult and continuing education (27 to 40)
4. The teaching profession (41 to 46)
5. The management and administration of education (47 to 52)
6. The financing of education (53 to 59)
7. The process to initiate and coordinate the reform process itself (60 to 65)

Implementation of the strategy commenced in 1993. It was envisaged that in the implementation process some activities will be undertaken as initiatives of individual member states with their own resources or in bilateral arrangements with donor agencies. In order to support the development a closely-knit educational system around the central values of the OECS (Secretariat) some interventions were developed for sub-regional implementation. The OECS Secretariat and individual countries proceeded to seek and obtain loans and grants from various donor agencies to support the implementation of the proposed strategies. In particular, a number of countries obtained loans from the World Bank and the Caribbean Development Bank to support their basic education development. The OECS sought and obtained financing from CIDA, GTZ, and EDF to support sub-regional initiatives. DFIDC and OAS have also made contributions to the reform process since 1990.

In October 1999, the OERU coordinated a self-assessment exercise by the nine member states on progress achieved to date in implementing the reform strategies. This activity, not intentionally related to the review of the Coordinating Mechanism and the CIDA review attempted to cast a wider net to capture the variety of modalities used by individual states to address the reform strategies. The resulting documents provide baseline information on each Strategy, and a useful overview of achievements at the national level to date. An analysis of the results can be found in the Appendix section.

## **1.2 The OECS Education Reform Unit**

Strategy 63 of *Foundation for the Future* recommended the establishment of an OECS Education Reform Unit (OERU) within the OECS Secretariat, which would be the executive arm of the member states in coordinating the Reform Strategy. A Director and other full-time professionals and support staff would constitute the Unit. Its responsibilities would include:

1. Conducting professional and technical work related to the planning and implementation of the reforms as approved by the Reform Council.
2. Establishing working linkages with Ministries of Education, the private sector, teachers' unions, etc, and other relevant regional bodies in the execution of their tasks.
3. Executing professional and technical work related to monitoring and evaluating the progress of the reforms or the commissioning of such work.
4. Conducting national and regional consultations related to the reform process.
5. Conducting the professional and technical work related to negotiation and interaction with international agencies.

In 1993, the OECS Secretariat obtained initial funding for two years from CIDA, to establish the OERU as the coordinating mechanism of the Reform Strategy. The first Director, Dr. George Forde, prepared and presented an Implementation Report in May 1994, outlining the priorities of the newly established OERU, through a series of 12 project areas for which external funding could be sought. CIDA committed funding for the basic operations of the OERU itself between 1993 and 2001. CIDA also agreed to fund a number of the core education reform activities - curriculum harmonization, management of Ministries of Education, EMIS, information and communications technology, education monitoring, among others - through the ECERP project, until 2003.

GTZ has provided assistance to the OECS Secretariat in the area of technical and vocational education, with an emphasis on providing training opportunities for teachers and the development of practical work experience within the school setting as part of Technical and Vocational Education and Training (TVET).

The European Union through the EDF/HRD programme has provided assistance to develop tertiary education, including the provision of new coordinating structures and physical facilities, and to train secondary school teachers.

The UK Department for International Development - (Caribbean (DFIDC) through the OECS/UWI/DFIDC programme has provided assistance for upgrading qualified primary school teachers, inducting new untrained teachers, and increasing the capacity of principals to supervise instruction. This project is managed through the School of Education, UWI, Cave Hill campus.

### **1.3     *The Challenges Of Education In The Eastern Caribbean***

Current education indicators place the OECS member States well above the average for all countries at similar levels of economic development. Significant and consistent public investment in education, in relation to their economic status, has been made in all countries of the sub-region. As a result, tremendous strides have been made, particularly with respect to access to basic education over the past thirty years. All countries provide some form of basic education for all students up to the age of 14. Most countries offer pre-primary education to approximately 80% of the age cohort, although in general this is privately funded. Steady progress is being made towards attaining the goal of universal secondary education. Enrolment at the tertiary level has been growing, although it is still relatively low.

Besides giving emphasis to increasing access, attention is also being paid to improving quality, in such areas as curriculum development, teacher training, evaluation, information and communication technology, counselling and special education.

Despite the progress being made, several deficiencies will need to be addressed in the coming years. Some of the more critical ones are addressed with recommendations for alleviation in *Pillars for Partnership and Progress (OERU/OECS 2000)*:

1. Expansion, reconceptualization of the form, process and quality of secondary education. (See proposals for strategies 31-37 in PPP 2000)
2. Increased access to, and governance of post-secondary/tertiary education matters related to articulation of programmes and reorganization TVET also need attention. (See strategies 38-51 in PPP 2000)
3. Review of the competencies achieved in primary and secondary education, to enable school leavers to function effectively in the twenty-first century (sciences, technology, mathematics, foreign languages, communications, computers, etc), with an emphasis on critical thinking skills at all levels. (See strategies 26, 28, 30, 33, 35 in PPP 2000).
4. Increase in the availability and quality of life-long learning opportunities, with a view to raising the mean educational level of the population.
5. Reduction in the disparities in educational attainment among the different socio-economic groups. Growing disparity in participation rates between boys and girl at the secondary and tertiary levels. (See strategy 49 in PPP 2000).
6. Devising programmes and opportunity for the large numbers of out-of-school or under-educated youth, and so reducing the incidence of unemployment and rapidly rising juvenile delinquency and crime rates.
7. Effective management and administrative skills to promote a high quality of school management. (See strategies 59 & 60 in PPP 2000)
8. A need for effective and ongoing monitoring of education, including access to information and data. (Strategies 12 & 61 in PPP 2000).

## 2.0 THE REVIEW OF THE FIRST TEN YEARS OF OECS EDUCATION REFORM

The implementation of a number of projects through the OERU has not been always coordinated with the developmental activities initiated by individual countries, and CARICOM, thus leading to some degree of duplication. The need for accountability for implementation and the importance of sustainability of project results, activities and processes were also concerns expressed by stakeholders.

In response to these expressed concerns, as well as a desire to clarify its own role in sub-regional educational reform, the OERU, between May 1999 and February 2001 undertook a number of reviews and consultations. The major objective was to develop a strategic vision and an operational framework for the OERU that reflects the collective expectations of its institutional stakeholders. A substantial part of the process was a critical scan of the internal and external environment of the reform process.

*Strategy 63 of Foundation for the Future* proposed that the OERU “**be externally funded for 10 years, as a critical aspect of the implementation of sub-regional reform within the education sector. After this period the Central Authority would determine whether or not the Unit’s central functions should be institutionalized within the Secretariat.**”

A team funded by DFIDC, was commissioned by the OECS to examine and report on the level of efficiency and effectiveness of the coordinating mechanism of the Reform Strategy. Specifically the emphasis was on the quality of implementation in relation to strategies 60 to 65 in *Foundation for the Future*. This review was scheduled to coincide with the CIDA mid-term review of the Eastern Caribbean Education Reform Project (ECERP). In fact, the two review teams worked collaboratively throughout the review process, although the reports were separate. Although the emphases of the two reviews were not identical both reports produced recommendations in relation to the coordinating mechanism for the reform process.

It is instructive that these recommendations are generally similar to the initial purpose of establishing the OERU. One interpretation of the recommendations of the reviews is that the critical aspects of the process of educational reform are still relevant and there is still high interest in the sustaining a mechanism to coordinate the Reform Strategy.

Overall, the concerns in the reviews may be summarized as follows:

1. All member states have adopted the education reform strategy and remain committed to the reform process. There is strong support from all categories of stakeholders for the continuation of sub-regional collaboration, with a convincing rationale for continued co-operation.
2. Overall there is strong support for a coordinating mechanism and systems to facilitate the continuation of the reform process on a sub-regional basis, but a marked reluctance to pay for the existing OERU from national funds unless there is clear and demonstrable “value added”.
3. There is a strong concern that the reform process has become “over projectized” and that there is a case for considering more flexible approaches to funding the process.
4. Education Reform activities are perceived as MOE activities with principals and teachers unaware of the instrumental support from the OERU. Donor and funding agencies are equally unclear about the structure, role and functions of the Unit as distinct from the projects the Unit implements. There is a clear need for the OERU to establish its identity and promote the “value added” that it brings to the Reform process.
5. Communications between the stakeholders and OERU are seen as unsystematic. Electronic systems of communications are, by and large, not working.

The Review of Foundation for the Future resulted in a revised strategy document: *Pillars for Partnership and Progress, The OECS Education Reform Strategy: 2010 (PPP)*. With the exception of the strategies concerned with education finance, the evidence suggests that the governments of member states have all adopted the Education Reform Strategy as a major element in their respective political agendas.

The analysis of Education Reform at the OECS takes into consideration work done at the wider regional level and agreements to which OECS Governments are signatories. A Special Meeting of the CARICOM Standing Committee of Ministers of Education in Barbados (1997) approved the Strategies for development and the Critical Elements for Change. The meeting agreed that human resource development in the Caribbean must take into account the following:

1. *The emerging profile of the workforce needed for competitiveness;*
2. *The re-organization of the productive processes;*
3. *The development of abilities, attitudes, skills and technological knowledge necessary for jobs, entrepreneurial development and human well-being.*

The Reviews recommended that the OERU consider the adoption of the major approaches to a revision of educational thought and policy contained in *Vision 2020: A strategy for Education in the Caribbean*. These approaches include:

- a) Consolidating and accelerating education reform efforts;
- b) Making the school the centre of focus of the system;
- c) Addressing the knowledge gap;
- d) Strengthening regional collaboration.

The PPP however points out that “Underpinning all of these initiatives is the recognition of the unprecedented pace of change particularly over the last ten years and an awareness of the importance of systematic evaluation as a tool of effective implementation.”



### 3.0 THE EDUCATION REFORM UNIT'S ROLE WITHIN THE MISSION OF THE OECS

The programmes of the Education Reform Unit are critical if the overall OECS mission is to be achieved. The latest OECS Mission Statement reads: (OECS Strategy Document 2000-2005)

***Our Mission is to improve the quality of life of the people of the member states by facilitating the coordination of strategies, which will motivate and enhance the economic, social and cultural development of the region."***

It will be noted that numerous research studies show that relevant, meaningful education improves the quality of life of citizens and confers the social and economic mobility that enables them to contribute to the developmental needs of their countries.

In addition, among the broad developmental goals into which the above Mission is expected to translate, the following relate directly to or overlap with those of the Education Reform Unit:

- Design and implement programs and projects that advance the developmental goals of the region (especially where they relate to human resource development)
- Develop policies and coordinate processes that advance national and regional plans
- Researching and identifying development needs and priorities which can be initiated or assisted by the Organization
- Forging functional linkages with Governments and their agencies to create synergies and to advance the implementation of target programs
- Develop policies and coordinate processes that advance national and regional plans
- Assist Governments with the formulation of their developmental strategies and provide leadership in areas of regional coverage.

***"Planning for the region must ensure we have the capacity to meet the challenges that materialize trends" (OECS Strategy Document 200-2005)"***

In the design of the new Strategic Plan of the Unit, much care was taken to ensure that the new framework was "demand oriented" and had the flexibility to respond to emerging national, regional and global trends.

It is only through such a mechanism that the OECS will be able to provide a workforce that is competitive and one that can meet the demands of globalization.

In realigning and upgrading *Foundation for the Future*, a careful study was made of present environmental, social, technological and economic trends. As a result new strategies were added to embrace new developments in each of these areas. Most significant are those which have links to

- *the environment - (promotion of health-promoting schools- Strat. )- disaster preparedness – Strat.No*
- the social landscape – (male alienation; cultural development or holistic development
- technological changes – increased electronic communication and ICT integration in education
- economical changes – upgrading of science and technology and TVET.

A study of trends on all of these landscapes as well as on the educational landscape has led to a careful selection of programme priorities or thematic areas for inclusion in the Strategic plan.

## 1. SCHOOL MANAGEMENT Programme Area

This programme area is included

- In keeping with the trend to shift to student-centred learning
- to give more autonomy to schools as they develop a base for community life-long learning
- to provide a greater outreach to 'out of school youth', enabling greater skills development and literacy/numeracy improvement
- to develop the leadership and management capacity of principals and school managers.

This programme areas is expected to impact strongly on the development of life-long learning leading to the development of a more educated human resource base. This has links to the fulfillment of the economic goal of the OECS mission - to create to more knowledge-based economy by providing more human capital.

## 2. The INFORMATION MANAGEMENT and ICT IN EDUCATION Programme areas

These programme areas have strong links with the technological revolution which continues "to open doors for new materials, products and services for the region. It will serve to narrow the industrial divide that now hinders our progress in many areas". It will further address the need, through communication and computing power, to move from an industrialized society to a new information society and ultimately to a knowledge society.

In addition, the introduction of on-going computerized assessment and Education Management Information Systems (EMIS) will give policy makers and decision makers the tool they need to make more informed decisions. They will be able to assess the nature and potential of their human resource base and be able to easily track the flow of skilled human resources through the systems. This is indispensable at a time when there is an increased demand for services over manufactured goods.

### 3. CURRICULUM HARMONISATION AND DEVELOPMENT Programme Area

Through harmonization of the curriculum of member states, this programme area is expected to make a significant contribution to the creation of a common society to which economic trends point in the OECS. The easing of trade as well as travel restrictions is expected to result in freedom of movement of goods and services from one region to another. This movement will be restricted or limited if educational opportunities differ and if there is major disruption in the educational development of children when families move.

Much progress has already been made through the harmonization of grade names and through the harmonization of learning outcomes in two core subject areas of Language Arts and Mathematics. Further work to harmonise assessment practices in primary and mid-secondary will facilitate as well the sharing of resources and exchange of personnel.

In addition, this programme area will seek to improve teaching effectiveness and making curricula more relevant to life and work. This will improve the holistic development of the child as well as improve the effective human resource base of the country which will add value to its economic and social development.

### 4. TERTIARY/POST SECONDARY EDUCATION Programme Area

The rate at which our economy grows and the level of empowerment and independence we bring to our countries will depend a great deal on the percentage of the population seizing opportunities to move to a tertiary stage of education. Our supply of teachers, managers, directors and leaders will depend on the offerings our countries can provide at this level. In the OECS countries only between 3-7% of the population achieve a tertiary level of education. If we are to reach the level of 17% targeted for 2010, then a great deal of effort must be put into increasing access to tertiary institution or enabling learning through distance education or other new technological means. This programme area, as well as exploring these channels will also seek to ensure that there are quality controls in the system. This is especially important at a time when offerings for accreditation are coming from many different off-shore quarters. It will impact a great deal on the quality of human resource we provide.

Harmonisation in this area, in conjunction with common accreditation standards will greatly improve the pooling of resources across the OECS as well as enhance the free movement of skills in the creation of a common economic society.

### 5. PROFESSIONAL DEVELOPMENT OF TEACHERS Programme Area

The quality of human resource our countries provide can only be as good as our teachers. Unfortunately all countries are struggling with the departure of teachers from the teaching profession. The more developed countries are now recruiting trained teachers from less developed countries using the offer of higher salaries and citizenship offers to lure them to their shores.

A recent survey conducted by the OECS in the 9 OECS countries revealed that although salary was a factor in attracting a particular quality of person to the profession, it was not the major factor which resulted in their remaining or leaving. The most important factor was seen to be 'professional development'. Once a teacher entered the education system in our states, it seems that little or no provision is made for career advancement or professional development. The result was a feeling of stagnation and the desire to quit for a more interesting occupation.

In addition the physical and social conditions in which teachers now operate tend to make teaching a less attractive choice for a profession.

This programme area will explore and develop ways in which (a) a career path could be established (b) on going training could be institutionalized (c) teachers' social and physical conditions could be addressed and (d) the teachers' changing role in the creation of new knowledge based technologically driven societies can be developed.

Without this important input into our new strategic plan, it will be practically impossible to effectively achieve the outputs we envisage from the other programme areas.

## 6. THE TECHNICAL AND VOCATIONAL EDUCATION TRAINING Programme Area

If Education is to be made relevant to the OECS reality, it is necessary to upgrade the role technical and vocational education must play within and outside of our education systems. In the drive to promote skills and services to buttress our tourism and manufacturing industries, we must ensure that a significant percentage of our population is highly skilled.

There is a dire need to develop a philosophy and policy for technology education and TVET within the school system. There is also the need to "rethink and reorganize Technical and Vocational Education (TVET) to produce a standardized system that functions in a partnership with the private sector and is intimately integrated into the world of work and further study." (Pg 35, PPP)

This programme area is expected to address the needs expressed above.

Finally, our upgraded strategic blueprint Foundation for the Future, now termed Pillars for Partnership and Progress, stresses the need for partnerships to underlie the achievement of any goal we have. To this end we will be seeking to build new partnerships at every level especially with other Units in the OECS on cross-cutting social, environmental, technological and economic issues. Education should no longer be seen as the prerogative of Ministries of Education only. There is a need to educate the entire population to achieve our goals. To this end, education must become everybody's and the nation's prime focus for every area of development.

It is on this realization that we will strive to make education the corner-stone of our countries' developmental process and as we seek to add value to whatever our member states are doing.

## 4.0 THE MISSION AND GOALS OF THE OERU

### 4.1 OERU Mission:

*The OERU is a professional service organization facilitating and coordinating initiatives that add value to the educational development process in OECS Member States.*

### 4.2 Corporate Goals:

In support of its mission the OERU would like to be recognized by our clients:

- ✓ As being sensitive and responsive to their needs;
- ✓ As providing innovative, yet relevant solutions for education reform and related education and human resource development programmes in the OECS;
- ✓ As providing an environment for professional and personal development of our staff at all levels;
- ✓ As a good corporate citizen, promoting and supporting healthy lifestyles at the physical, intellectual and spiritual levels, especially among the youth;
- ✓ As being prudent in the management of financial resources entrusted in our care.

### 4.3 Guiding Philosophy

The OERU will operate as a professional customer-needs-driven organization, providing the best mix of integrative solutions in education reform while promoting and encouraging the full participation of Member States.

Our guiding philosophy affirms that all children can learn, are valuable and have a right to an education. We recognize that the importance of Early Childhood Education in the future development of the child and of member states. We recognize the importance of an education that develops the child socially, culturally, intellectually and physically. We are further guided by the knowledge of the value of education and its contribution to the social, cultural and economic development of our countries.

### 4.4 Objectives of the OERU over the next 10 years

*(articulated as strategy76 in Pillars for Partnership and Progress) :*

1. To coordinate the implementation of the reform strategies with the policy framework and general directions given by the Council of Ministers – the Reform Council.
2. To manage sub-regional programmes and projects related to the implementation of the reform strategies financed through loans or grant funds.

3. To provide leadership in the implementation of the information and communications strategies in the sub-region and to manage the hub of the sub-region information and communication infrastructure and sub-regional databases.
4. To provide leadership in such areas as curriculum development, planning and material development thus ensuring collaboration, cooperation and coordination of the work of national curriculum, planning and material production efforts.
5. To act as a broker of knowledge and expertise between the countries and with the wider Caribbean by engaging in information transfer, knowledge generation where necessary and building a knowledge base of OECS experience of reform and delivery of education.
6. To manage a Response Fund that seeks to stimulate initiatives in countries relative but not exclusive to the implementation of reform strategies by stakeholders other than Ministries of Education.
7. To support and provide services to Council of Ministers, OETEC and the Technical Advisory Committees as well as to provide appropriate training to representatives of the partners with respect to collaboration and cooperation in the reform process.
8. Represent the OECS in various regional and international forums as well as liaising with regional and international bodies engaged in educational activities in the sub-region. In this regard, ongoing working relationships would need to be maintained with the CARICOM Secretariat, CXC and the University of the West Indies

#### ***4.5 The OERU Guiding Principles:***

A number of principles will guide any activity undertaken by the OERU in the implementation of education reform in the OECS region.

##### **1. Harmonization**

1. facilitating the continued and increased harmonization of policy, administrative and professional components of OECS educational systems.
2. Fostering the educational reform process through a collective approach and sustained coordinating mechanisms.

##### **3. Enhancement**

1. Enhancing the status of education through promoting and encouraging partnerships among stakeholders in education;
2. Assisting educational systems to promote the value of quality education throughout the OECS.

3. Incorporating periodic evaluation and reassessment into the planning and implementation of systemic reforms.
4. Sustainability
  - Encouraging the development of programmes and processes that are sustainable;
  - Advising on and assisting in the use of appropriate resources that build capacity that can generate sustainable structures and practices.
4. Access
  1. Supporting and assisting member states' efforts to increase access by children and adults to all levels of education (pre-school, primary, secondary and tertiary), including access to education by children with special needs and the out-of-school population.
  2. Reduction of inequity and mitigation of poverty in the education system.
5. Management and Administration
  1. Supporting member states' efforts to make schools more efficient and effective, particularly by supporting efforts to improve school management and leadership skills.
  2. Supporting member states' efforts to strengthen the management and monitoring capacities of Ministries of Education.
  3. Ensuring that the management and administration practices of the OERU reflect the quality required for efficient and effective implementation of the OERU objectives
6. Communication and Networking
  1. Facilitating the exchange and dissemination of information on education among member states and providing access to information on regional and global "best policies and practices."
7. Participation
  1. Supporting member states in their efforts to increase the participation in and commitment to the education reform process by all stakeholders.
  2. Facilitating sub-regional participation of member states in collaborative reform processes.

## 5.0 PROGRAMME PRIORITIES AND THE ROLE OF THE OERU

### 5.1 Regional Collaboration

The Review of *Foundation for the Future* makes a convincing case for sub-regional co-operation and the OERU. One of the lessons emerging from the 1990 - 2000 decade is that several countries are experiencing difficulties in coping with the demands of numerous activities related to externally funded projects. Indeed, one of the main reasons that the OECS countries commissioned the long-term education sub-regional strategy, *Foundation for the Future*, was their inability to cope individually with the requirements of donor agencies from which they received grants or obtained loans.

The Review further identifies four areas or circumstances where regional activities or projects readily suggest themselves:

1. Instances in which the explicit or implicit goals are to foster regional integration, promote regional collaboration, build regional identity or establish common regional standards or some combination of these.
2. The mounting of projects in small or very small countries whose individual planning and project implementation are very limited. In such circumstances independent national projects run the risk of inadequate institutional capacity. Regional projects are one way of mitigating this risk.
3. Circumstances in which the goals are to create economies of scale, in such areas as curriculum development, textbook production, material development, software development, examinations or teacher training, accreditation mechanisms.
4. Situation in which the intention is to test the feasibility of innovations and ideas in education in a wide variety of settings in order to establish the extent to which these innovations can be transferred and generalized.

The PPP identifies many common imperatives that all the recent strategy documents have identified:

1. Knowledge and Management
2. Affective development
3. Incorporation of Information Technology in education
4. Reduction of inequity and mitigation of poverty in the education system.



In the preamble to the outline of the strategies in PPP the strategy document identifies “Partnership” as a fundamental pillar of education reform, thus emphasizing the potentially critical role which the OECS Secretariat can play through the OERU:

*“the scope of the changes that are needed in education to cope with and constructively engage the imperatives at the beginning of the new century require responses at different levels including:*

- *New mechanisms for collaborating and cooperating at the level of the OECS sub-region.*
- *Some reorganisation of national systems of education in the nine countries.*
- *New relationships between schools in districts, parishes or outer islands.*
- *New relationships between schools and the communities in which they are located.*
- *Reorganisations within schools and colleges that include new ways of relating between teachers, students and parents.*
- *Changed approaches to learning on the part of teachers, students and parents.*

*Thus, partnership is the new paradigm for education reform. Partnership is mandatory as a result of the interests of the large number of stakeholders involved with the education enterprise, the provision and participation required if education is to achieve its goals and the multiple levels at which educational reform is required.”*

## **5.2 Programme Planning**

The OERU will organize activities within broad programme areas, planning with a programme approach, as opposed to a project approach. This will allow the subregion to determine its priorities and specific outputs and inputs within a programme area before the determination of funding source is made. Specific project plans could then determine which programmes and which aspects of the larger programme it is in a position to support, based on the rules and regulations and policy guidelines governing the donor. This should minimize many of the concerns expressed by member states, especially in relation to the coordination of activities within a single donor-sponsored project, as well as between and among activities funded by different agencies. Many donors are involved in the Education Reform process at the national and sub-regional levels. Given the number of donors and the scope of programmes, there is concern about donor coordination and the absorptive capacity of member states. The member states have also expressed the concern that projects are started and terminated without adequate achievement of results and continuity. In adopting a programme approach to implementation of reform the OERU will seek to negotiate with donor agencies a coordinated approach to funding, with agreed guidelines and accountability procedures. This approach could possibly lead to the development of a set of conditions and operating procedures in place to meet the needs of all donor funding.

A programme approach should :

- I. Facilitate states in taking ownership of the activities, particularly through the involvement, of proposed Advisory Councils or similar bodies;
- II. Provide long-term sustainability for the activities.
- III. Enhance flexibility in programming, through an iterative approach.
- IV. Minimize the conditions imposed by external donors, by having all donors contribute to an overall plan and to a specific programme area in a holistic manner.

*A Programme is defined as a holistic set of activities directed toward achievement of a cluster of related educational objectives. A Programme may consist of a combination of routine processes undertaken by individual educational systems as well of specific projects funded by local or overseas donors for individual countries as well for the entire sub-region.*

### **5.3 Programme Priorities:**

Over the next decade, the OERU will concentrate its activities in seven strategic programming priorities. **The proposed programming priorities** are:

1. **Effective institutional/school management**, including the development of a greater incidence of site-based management; (See strategies 60 & 61 in PPP 2000 dealing with participation in education management, training of educational administrators and networking and exchange of educational specialists). More specifically the OERU will foster development in the following areas:
  - a. Improvement in educational leadership and personnel management practices;
  - b. Improvement in student attitudes and behaviour;
  - c. School, community and stakeholder collaboration;
  - d. The sharing and adoption of "best practices" in school management.
2. **Information management and effective monitoring** in order to develop and enhance resources for more effective educational decision-making at national, district and school-site levels; In addition, movement toward a harmonized system of information management and information sharing at the sub-regional level is a major goal. Specifically, the OERU will guide and monitor the implementation and operation of the following:
  - a. Establishment and use of a common set of educational indicators that assess input, process, quality, access, resources, equity, output and outcome;
  - b. Establishment of a computerized EMIS in member states with a linkage to a centralized OERU;
  - c. Articulating the OECS EMIS with CREMIS and other education management information systems of the region
  - d. Reporting on trends in information management and advising on the implications with regard to informing policy decisions.

3. **Tertiary education/post-secondary education**, in relation to harmonization of governance structures and programme development, including diversification and evaluation. This programme area, already being defined through the EDF/HRD programme, will continue its work to promote standardization and harmonization of programmes and accreditation practices among Tertiary/Post-secondary institutions in member states. (See strategies 38-51 in PPP 2000). Specific areas of operation will include:
  - a. Promotion of relevant courses to enhance the economic development of the sub-region;
  - b. Enhancing collaboration in relation to modes of training;
  - c. Spearheading the development of Centres of Specialization;
  - d. Coordination of programmes in tertiary education through a College Council
  - e. Sharing of information and “best practices” among similar institutions;
  
4. **Curriculum harmonization in core areas at the primary and secondary levels**, including the development of criteria for achievement standards and harmonization of assessment procedures. This programme area is very wide and, if deemed necessary, can be divided into Humanities and Science and Technology subsections. (See strategies 26 and 32 in PPP 2000) Specifically the concentration will be in the following areas:
  - a. Harmonization of curricula in the designated core curriculum;
  - b. Development of learning outcomes and attainment criteria in core curriculum;
  - c. Promoting the development and sharing of curricular and instructional materials and “best practices”;
  - d. Encouraging collaboration among curriculum personnel;
  
5. **ICT in Education**, with specific reference to information communications technology (ICT) and the infusion/integration of technology as a curricular area in the primary and secondary school curriculum; (See strategies 12-18 in PPP 2000). This programme area is necessary in light of the revolution at present occurring in education through technology. New ways of accessing information, of learning and teaching, and the increasing use of computers in the world of work have made this area an important aspect of education reform. The focus in this area will be on the following:
  - a. Implementation of a common ICT Policy for educational systems in the sub-region;
  - b. Development of a university-moderated certificate programme in ICT for teachers;
  - c. Diffusion of “best practices” to integrate the use of education technology in schools
  - d. Development of learning outcomes for ICT in the primary school;
  - e. Promoting the use of computers for introduction to the world of work.
  - f. Promoting an enabling environment for the development of software by students and teachers.
  
6. **Professional development of teachers** in order to enhance the overall quality of the profession as well as helping to inform career development of teachers; (See strategies 55-57 in PPP 2000) This programme area is an essential component of any educational reform process. Professional development and career enhancement are also critical to sustaining high teacher morale, commitment and job satisfaction. The following components will be areas of concentration:

- a. On going /in service professional development of teachers; the OECS/UWI/DFIDC initiative is an on-going activity in this direction;
- b. On-going EDF/HRD Secondary Teachers' Training Programme;
- c. Assisting in developing the career paths for the teaching service;
- d. Facilitating the development of common minimum standards for the teaching/learning environment.
- e. Encouraging informal and site-based professional development activities;
- f. Developing broad stakeholder consensus on the role of teachers in developing human resource;
- g. Development and sustaining of awareness of issues related to equity in the provision of educational service. Attention to gender in education (access and treatment in relation to students specifically) diversification of curriculum, including access to TVET, and gender distribution of teachers within schools, across levels of educational systems and subject areas are some of the concerns.

## **7. Technical and Vocational Education and Training**

The TVET programme which already exist as part of the OERU activities needs to be continued for another five (5) years before the efforts of the last twenty or more years become sustainable. With the funding of the GTZ coming to an end in the previous format, new funding may become available from various sources. There is now new capacity of the OECS TVET Programme to address activities and initiatives that are more in tune with the national and sub-regional TVET focus, and which are no longer restricted by the limited flexibility of the OECS/GTZ TVET Project. The following are the proposed activities of the TVET Programme over the next three to five years:

- a. Consolidating the efforts of this phase of the Project in the areas related to; public awareness, the Training Office, national and sub-regional TVET Policy development, national training mechanisms, and sub-regional TVET coordination.
- b. Addressing the problem of OECS TVET teacher training through the development and implementation of strategies for training OECS TVET teachers
- c. Establishing a regional mechanism for the certification and accreditation of vocational and occupational competencies.
- d. Developing occupational competency based curricula for the OECS
- e. Organising a competency based training system in the OECS

## 6.0 GOVERNANCE AND STAKEHOLDER PARTICIPATION

The OERU recognizes that the ultimate goal of education reform is to have a development impact on every man, woman and child in the OECS. This ultimately is expected to result in a society that is developed socially, culturally and economically. To ensure the relevance and sustainability of the activities and results of the reform process the stakeholders must be involved in the planning, implementation and evaluation of education reform activities. The following structures are proposed for the effective implementation of the OERS:

**6.1 The Education Reform Council (Council of Ministers of Education)**, the highest governing body of the reform will continue to meet once a year. The focus will be on policy issues and strategies to accelerate the reform process.

**6.2 The OECS Technical Education Council (OETEC)** will meet once a year, receive reports from the various Advisory Councils, receive the resulting draft work plan of the OERU, and recommend policies to take forward to the Ministers of Education. As recommended in the Reviews, OETEC will be assisted in taking a more proactive role in formulating development strategies. OETEC will assume leadership in pressing for collaboration with other regional entities involved in education, and play on a more strategic role in terms of advising on policy options for the OECS.

### **6.3 Technical Advisory Committees**

In order to increase the on-going and systematic linkages between the OERU and member states, and to facilitate the input and commitment of national experts at the institutional level, the OERU proposes the creation of **Technical Advisory Committees (TAC)**. These TACs will provide technical expertise and national realities for the on-going work of the Reform in each priority programme area identified for regional action. They will replace the network of present counterparts structurally, and fulfill some of the roles originally envisaged for the NERCs, particularly representing institutional stakeholders within the reform process. It is proposed that the Technical Advisory Committees will report to OETEC.

The proposed composition and functions of the TACs are set out below. Membership is not restricted to the categories of personnel identified.

1. A Principals and PTA Advisory Committee advising on measures necessary to provide more effective school management systems. The Advisory Committee for this programme area is expected to consist of Principals and PTA representatives of member states.
2. A Tertiary Education Advisory Committee/College Council advising on standardization and accreditation norms for Tertiary/post-secondary Institutions. The Head of Tertiary College will be the ex-officio member of the Committee, as well as members of the private sector and employers' federations.
3. An Education Planners Advisory Committee advising on indicators for measuring learning

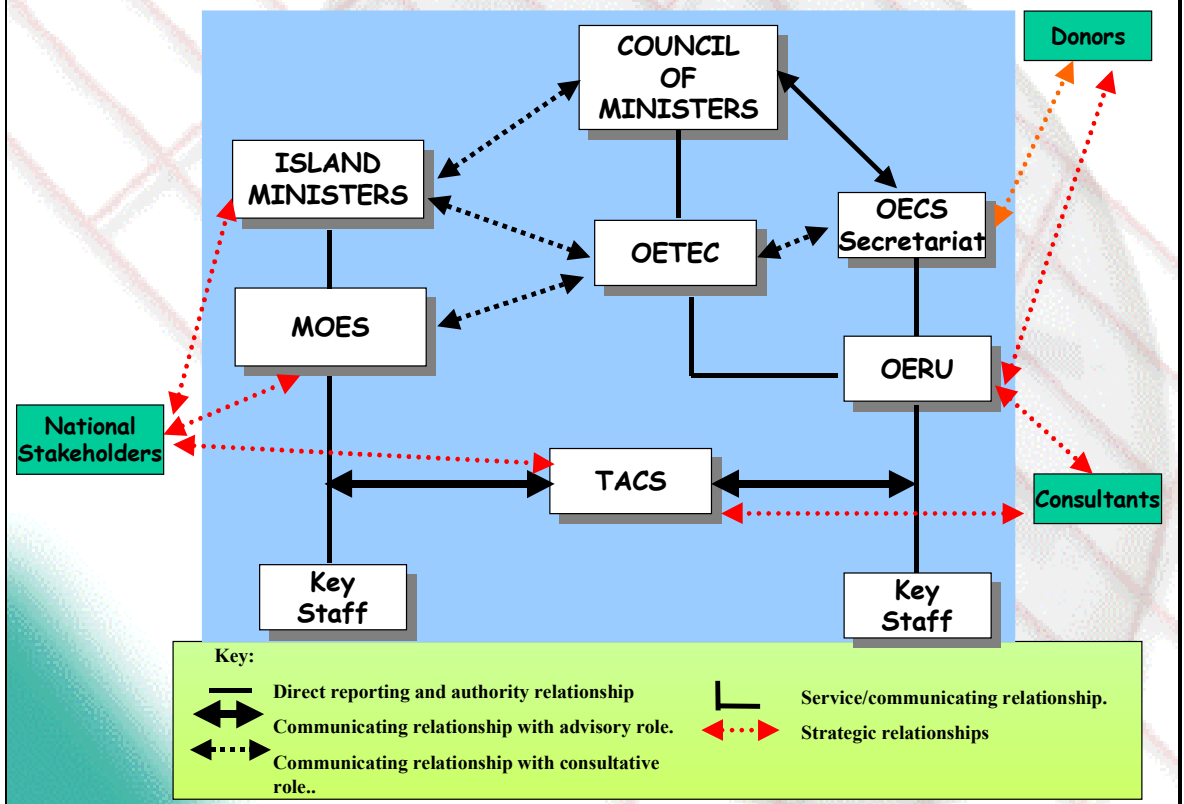
outcomes/achievement and the management of information systems for policy decision-making. The Advisory Committee is expected to consist of Senior Education Planners of member states.

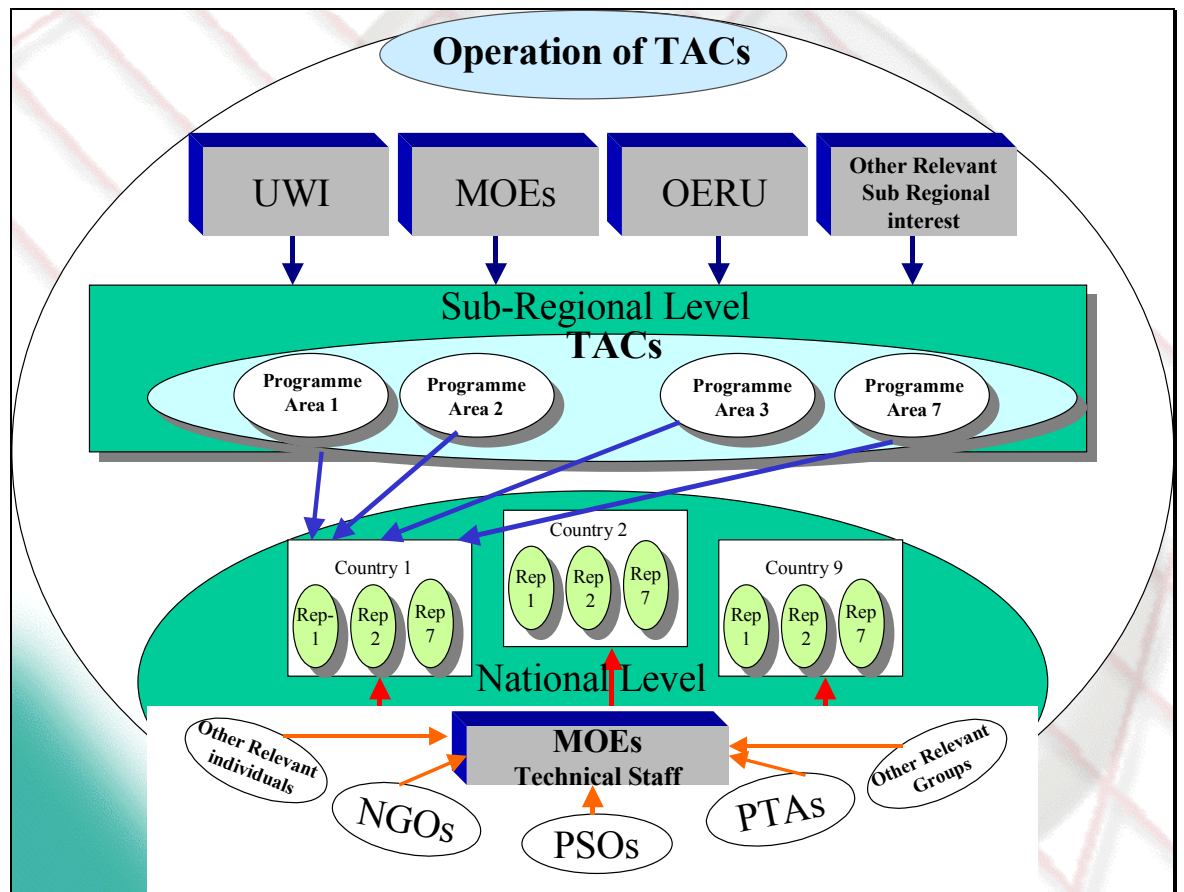
4. A Technology in Education Advisory Committee advising on new ways of accessing information, of learning and teaching. The Advisory Committee is expected to consist of professionals responsible for promoting the use of technology in schools. This Advisory Committee expected to work closely with Curriculum officers and/or the Curriculum Advisory Committee
5. A Curriculum Advisory Committee advising on curriculum reform (relevance) at all levels, including the integration of Science & Technology in schools, Adult and Continuing Institutions and the interfacing of school and work experiences. The Advisory Committee will consist of Education Officers responsible for curriculum, including TVET representatives, as well as Heads of Curriculum Units of member states.
6. A Teachers Advisory Committee advising on issues around the professional development of teachers. The sharing of “best practices.” The Advisory Committee will consist of Heads of Teachers’ Colleges, representatives from the Ministry responsible for teacher training and representatives of Teachers’ Unions.
7. A Technical and Vocational Education and Training Advisory Committee: This may be representatives of the National TVET Councils and /or the TVET coordinators of the Ministries of Education, private sector representatives, and specialist depending on the particular focus at the time.

Each Advisory Committee will have a face-to-face meeting once a year. Further work will be done through electronic media, coordinated by the staff of the OERU. A graphic illustration of the TACs is presented below. Also, a practical example of a team of professionals who have worked closely with the OERU described as an example of the way in which a TAC could work is shown in appendix 1.

The Committees will be expected to identify sectoral priorities and to provide input and advise to the OERU from the national perspective and plan for regional action. The decisions on sub-regional issues taken by Technical Advisory Committees will be presented to OETEC for approval. In cases where there is external funding for a set of activities in a specified programme area, a sub-set of OETEC or the TAC could perform the functions of a Project Management Committee. An example of the Terms of Reference of a TAC for Technology in Education is shown in Appendix 2.

## Proposed Governance Structure







## 7.0 PROPOSED INTERNAL OERU STRUCTURE

OERU is the central node and integrating element in the governance structure. It must be proactive in developing and facilitating reform initiatives; review and distill technical proposals moving from TACs to OETEC; facilitate MOEs in the timely and appropriate implementation of approved initiatives and satisfy the OECS Secretariat and, through it, the Donor Agencies, that the reform process is proceeding as intended

### 7.1 *The Core OERU Staff*

The PPP has made a case for regional cooperation. The governments need to make a commitment to a regional administration and specialist to ensure sub-regional action. Strategy 61 of PPP 2000 suggests creating/maintaining a central pool of “development specialists” to propel the reform. However, these “units” housing the specialists may be located in different countries or in a single country, depending on desirability and effectiveness. This must be examined in the light of possible SAVINGS rather than additional cost. There are situations where a critical development will be more efficiently and effectively done by one central team rather than nine (one per Member State).

At this stage of the development of the OERU the proposal is as follows:

1. That there will be a core staff of the Unit to be funded by contributions from member states.
2. **The core staff will consist of five positions.** Core is defined in this instance as the minimum number of positions which member states will fund. The persons holding these positions will have as their main collective function:
  - a. Ensuring that OERU pursues its mission diligently;
  - b. Enhancing the sustainability of programmes;
  - c. Facilitating the smooth operation of the Education Reform Council (Council of Ministers) and OETEC;
  - d. Developing and maintaining a dynamic communication system - website, electronic mail, on-line databases and a web-based documentation and tertiary library information system;
  - e. Supporting opportunities for the development of distance education using video conferencing technologies;
  - f. Providing professional support and advice to member states, especially the Technical Advisory Committees;
  - g. Seeking external funding in relation to activities in programme areas and to manage the implementation of the activities;
  - h. Represent the interests of the sub-region with various regional and international bodies.

Collective skills required by the core staff of the OERU include: understanding of education and the educational process, negotiation, contracting, proposal writing, action planning, programme budgeting, critical path analysis, group facilitation, staff supervision, and formative monitoring and evaluation.

Specifically the positions being recommended as core are:

1. A **Head of the OERU**, with overall responsibility for administrative, financial and human resource management, and policy development in conjunction with the OECS Secretariat;
2. A **Programme Development Officer** to work with the TACs, OETEC and Programme staff to develop and facilitate the planning of programmes, mobilization of resources and provide input to the implementation process.
3. A **Systems Administrator** to develop and maintain integrated communication and information technology systems to support operations of the OERU and member states, to a lesser extent.
4. An **Administrative Officer** to organize, supervise and facilitate delivery of OERU's administrative and personnel services to the satisfaction of internal customers.
5. A **Secretary/Receptionist** to facilitate the efficient operation of the OERU's document production, communications and reception services.

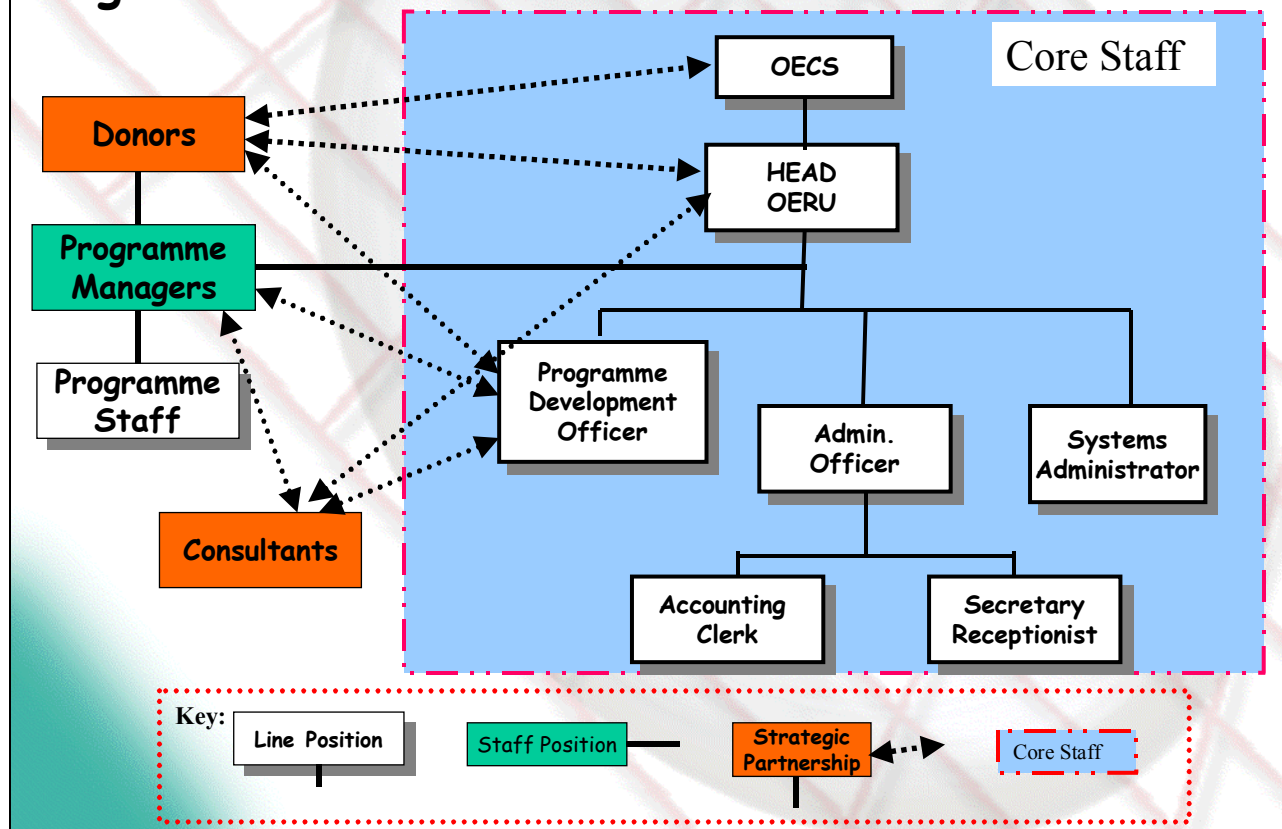
The Head of the OERU will continue to report to the Director of Functional Co-operation of the OECS. Other staff will report to the Head of the OERU.

## **7.2 Programme Staff**

Programme staff will be paid for by external funding for specific activities or from cost-recovery systems. Project or programme specialist and support staff will be retained to implement specific activities, on a contractual, time-specific basis. As much as possible, those staff would be seconded from OECS Ministries of Education and Tertiary Level Institutions. The number and composition of programme staff will vary depending on the need and financing available. (See Strategy 61 in PPP 2000).

It is unlikely that the Unit will suddenly be without grant funding for the next ten (10) years, if the existing staff in collaboration with the Technical Advisory Committees begin from now to identify follow up activities required to implement the reforms. The Programme approach would require that each TAC would develop an Action Plan that will identify the overall purpose, the objectives, and the means of achieving this over a period of time. This should be costed and the potential source of funds identified, including the areas already funded by governments.

## Proposed OERU Organizational Structure



## 8.0 PROPOSED FINANCING PLAN

### 8.1 *Annual Cost Of Basic OERU Infrastructure*

The recurrent annual operating costs of maintaining a basic OERU infrastructure can be estimated at EC \$568,000. (These costs, estimated from 2002, will be phased in over the next two years and will need to be adjusted in future years to cover inflationary increases.)

This budget covers the five core staff as well as basic support costs (office space, travel, communications, etc.). This annual cost is based on the following assumptions for 2001:

Head of the OERU	EC \$ 127,000
Programme Development Officer	96,000
Systems Administrator	76,000
Administrative Officer	68,000
Secretary/Receptionist	31,000
Core Staff Travel	50,000
Costs Related to TAC	80,000
OETEC Meetings	0
Office operations (rent, communications, equipment)	40,000

<b>Total</b>	<b>EC \$ 568,000</b>
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It is proposed that this cost, as of January 2004, be covered fully by contributions from member states. The total contribution for the OERU basic infrastructure, the TAC Meetings and the OETEC and Ministers meetings is shown in Table 1 below. By applying the OECS formula the distribution of the additional contribution of the nine Member States to the OECS Secretariat to pay for the Basic OERU Infrastructure is shown in Table 2 overleaf.

**Table 2: Distribution of Contribution from Member States for the Basic OERU Infrastructure.**

<b>Member States</b>	<b>Percentage (%)</b>	<b>Total Annual Contribution (EC\$)</b>
1. BVI	3	17,040
2. St. Kitts/Nevis	16	90,880
3. Antigua and Barbuda	16	90,880
4. Anguilla	3	17,040
5. Montserrat	4	22,720
6. Dominica	16	90,880
7. St. Lucia	16	90,880
8. St. Vincent & the Grenadines	16	90,880
9. Grenada	16	90,880
<b>TOTAL</b>	<b>106 %</b>	<b>EC \$602,080</b>

## **8.2 Cost Recovery Schemes**

As recommended by the Reviews, the OERU will endeavour, over the next two years, to identify possible areas in which it could provide services on a cost-recovery basis. This could be done in areas where there are possible economies of scale achieved through centralization and partnerships. This would require governments and institutions to recognize that some services can be delivered more cost effectively and efficiently by a regional organization than by themselves, and possibly to second specialist staff to the Unit for short periods to complete specific tasks.

A number of areas have been mentioned as potentially viable:

- (i) Provisions for a minimum administrative budget of 10% to 15% of the total programme budget to cover at least a portion of the related costs of administering donor funds for Programmes and Projects. For example, should the OERU attract EC \$ 2,000,000 in annual external programme/project funding, a 10% overhead charge would equate to a contribution of EC \$ 200,000 to the OECS.
- (ii) The OERU could offer the services of its technical staff on specific consultancies in the region, on a fee plus basis. This however, may have legal and bureaucratic implications that would have to be looked into.

- (iii) The OERU could bid on projects to offer the services of regional consultants to international financing organisations. Such services would be offered on a business base, similar to that of international business firms and NGOs, with an overhead charge for its services. This like the above would have legal implications. This however can serve as an experiential training opportunity for OECS professionals.
- (iv) The OERU could look into the possibility of a Donor – Government Association similar to the Association for the Development of Education in Africa (ADEA). (See [www.adeanet.org](http://www.adeanet.org) and appendix xx). This group strives to promote more effective partnerships between its two major constituents – African ministries of education and training, and funding agencies. Like the ADEA this association with donors could be developed into a structure designed to:
- reinforce OECS ministries' leadership capacities as they work with funding agencies;
  - develop these agencies' awareness that their own practices should be adapted to the needs nationally – driven education policies, programs and projects; and
  - develop a consensus between ministries and agencies on approaches to the major issues facing education in the OECS.

This will lead to a pool of funds to be used by the TACs based on the project request. The pooling of funds would minimize the strict conditions especially of origin of supplies and equipment which are usually restricting and limit the development objective. The OERU will however follow standard accountability procedures which is now being strengthened by the OECS Secretariat.

- (v) The OERU could offer sub-regional services on a cost basis in a number of areas: textbook production, international tendering of textbooks, materials development, software development, equipment, curriculum development, teacher training, etc., similar in concept to the OECS Pharmaceutical program.

Between 2001 and 2003, the OERU will conduct feasibility studies in these various areas, to identify which ones would have the greatest chance of success, while providing value-added service to member states.

### **8.3      *Proposed Phased-In Implementation Plan***

The implementation plan for the next decade can be divided in two distinct periods:

From October 2000 to December 2003, during which time external funding, from CIDA and EDF is still committed, to cover at least partially the costs of the basic OERU infrastructure and some programming costs. The final two years of funding from the EDF will be October 2000 to September 30, 2002, for the Tertiary Level Programme. CIDA funds are committed for ECERP for three to four more years from April 1, 2001 to March 31<sup>st</sup>, 2004. The OERU will use these next two years as a transition period for defining the new programming priorities, negotiating a programme approach with donors, and identifying new sources of funding. The budget attached reflects the proposal to CIDA to cover the costs of the basic OERU infrastructure over the next two years, with the exception of the emoluments of the Head of the OERU, which the OECS has already accepted to cover, as of April 1, 2000.

In addition, CIDA, the EU and DFIDC will be requested to cover the costs of convening the first meetings of the TACs, in the 2001. This period will be particularly crucial, as this first year will allow the establishment of the TACs themselves, and through them, the definition of the specific programming priorities. CIDA and EDF will continue to finance the education reform activities already in process. The salaries of specialist professional staff involved in these activities would continue to be covered by either CIDA or EDF, until completion. As the Working Groups start to better define priorities in specific programming areas, present CIDA and EDF funding could start to shift towards these new priorities in 2002.

### **8.4      *2004 To 2010***

As of July 2004, member states would assume the responsibility of fully funding the basic OERU infrastructure as defined above. When the present funding arrangements with external donors come to an end, to 2010 sustainable systems would have been put in place, and new sources of funds will have been sourced between 2001-2003.

## **APPENDICES**

### **APPENDIX 1**

#### **A PROPOSED APPROACH FOR THE DEVELOPMENT AND OPERATIONALIZING OF THE TECHNICAL ADVISORY COMMITTEES (TACs)**

This proposed model supports the recommendation in the ECERP Four Year Implementation Plan that states for at least the first two years of phase 2 of ECERP, CIDA support the programme area # 2 – “Information Management and Monitoring”. (ECERP Four Year Implementation Plan, pg 12).

##### **Justification for Programming:**

The Selection of Information Management and Monitoring as a Programming Area may be justified as follows:

Over the years, the OERU has supported a series of major reforms in education in close collaboration with the Ministries of Education (MOE) in each Member State. Through ECERP in particular, it has implemented a number of initiatives aimed at strengthening the capacity of MOEs to plan, implement and monitor education reform through sub-regional cooperation. To this end, two major initiatives have evolved that provide the “*framework and mechanisms*” to eventually monitor the progress of education reform in the OECS.

The first is known as the Education Management Information System (EMIS) initiative. The OERU is currently piloting this with the St. Lucia MOE with the view for its eventual use throughout the OECS. This initiative has overcome a number of challenges, but has been successful in installing the EMIS software in some primary and secondary schools in St. Lucia. The pilot is expected to be completed shortly and final recommendations submitted to the Council of Ministers Meeting.

The second Initiative is known as the Monitoring Education Reform (MER) initiative launched by the OERU and Education Planners of the sub-region. This initiative accomplished a major milestone when the MER Report, containing a conceptual framework and a core set of OECS education indicators, was approved by the Council of Ministers in June 2000. Each Member State has just recently launched a National Capacity Building (NCB) campaign targeting School Principals and their staff at the primary and secondary levels with the purpose of raising their level of awareness, understanding and skills in areas related to the management and use of performance information for education reform.

##### **Rationale for MER Working Group as a Model TAC:**

Education Planners and OERU Monitoring Counterparts, representing their respective Ministries of Education from across the OECS, have worked together for almost two years as an advisory/working committee to the OERU with respect to the MER initiative. They have provided the stimulus, guidance and knowledge that has made the MER initiative a recognized success in the region, while their participation in its meetings, workshops and activities has been unfaltering. As such, the region’s Education Planners have further prepared a results-based project proposal which reflects their vision of how best to build the national capacity in monitoring and managing education reform in the OECS. This to be effected at both school-



based and MOE levels. This proposal may be used in sourcing funds from CIDA and other external donors.

### **Salient TAC Features:**

Following are some salient features of the MER Initiative that satisfy requirements of the Programming Areas and of the TACs. For convenience the MER Working Group will be hereafter termed the MER TAC. The recent National Capacity Building workshops are referenced as a particular valuable example of MER TAC effectiveness:

- **Role of the OERU:**

- 1) The MER TAC working relationship with the OERU speaks to many aspects of the generic “Role of the OERU” as prescribed in the OERU Strategic Plan (pg.11) and other notable outlines:

- a. Consolidating and accelerating education reform efforts;
    - b. Making the school the centre of focus of the system;
    - c. Addressing the knowledge gap;
    - d. Strengthening regional collaboration.

- In PPP 2000 a similar view is expressed as “New imperatives and Conditions” (pp 13-14).

- 2) ECERP provides the basic frame work; OERU provides co-ordination, motivation and brokerage in increasing collaboration from the Ministry level; OERU sources & retains required internal and external expertise.

- 3) OERU serves as a communication hub or centre to maintain the sub-regional aspect of the Initiative. This by frequent, consistent group and individual communication and collaboration with the countries - primarily by e-mail.

### **Ownership**

- a. The MER Initiative is driven and owned by the MER TAC membership. Generally, the Planners have had significant input in fashioning the implementation modes. For instance their requested approach was that development, training, testing work be done with them initially. They then would take the developed activities to their own countries viz. train-the-trainer approach.
- b. There has been little change in the makeup of the membership since its formation.

### **Legitimacy and Authority**

- a. The MER TAC receives full support from top MOE authorities, with whom most of the membership works closely in their national situations.
- b. The Planners in certain instances are heads of Planning Units, themselves having a certain amount of authority and decision-making responsibility.
- c. Recent NCB workshops saw the personal involvement and interest of several Ministers of Education.

### **Pooling of Resources, Sharing and Developing Sub-regional Expertise**

- a. Growing relationships among the MER-TAC membership continues to engender a level of pooling of resources and sharing of expertise that continues to grow beyond OERU's activities and efforts.
- b. MOE, Commonwealth of Dominica released its Senior Planner for almost 3 weeks to assist the Leeward Islands states in their national capacity building.
- c. MOE, St. Lucia willingly lent its Statistician to assist in Grenada.
- d. Other examples of sharing expertise may be found in countries requesting and offering assistance by visiting and helping each other.

### **Stakeholder Participation**

The MER-TAC has involved increased participation among a wider variety of education stakeholders. All countries held national consultations – to varying degrees on the conceptual framework, indicators and definitions, before they were finalized.

### **School-Based Perspective**

- a. The work of the MER TAC is currently school-based. During recent NCB activities, about 65 % of the schools in 7 countries (excluding St. Lucia & SVG) have received the OECS Performance Management Tool. This instrument is based on Performance Indicators & encourages the empowerment of principals in the management and monitoring of school performance.
- b. The MER TAC work at school levels has begun critical work in professional development and capacity building of school principals.

### **Global Perspective**

- a. The MER TAC maintains a global perspective on monitoring through an active Regional and International component of its work. Members of the MER TAC are for the most part national contacts for the UNESCO Institute of Statistics and the Summit of Americas Indicators project.
- b. The OERU also plays a valuable role in the global context. The countries, naturally operate as individual units, but the OERU is recognized and consulted as the broker, regional voice and advocate for OECS countries.

**Conclusion:** The above attempts to address some of the criteria that may contribute to the successful implementation and operationalization of OECS Technical Advisory Committees.

## **APPENDIX 2**

### **OECS TECHNICAL ADVISORY COMMITTEE (TAC) FOR ICT IN EDUCATION** **TERMS OF REFERENCE (TORS)**

#### **1. NAME AND FUNCTION:**

- I. The committee shall be called the ***OECS TAC for ICT in Education***.
- II. The committee's purpose and function is to advise, assist and facilitate sub-regional cooperation among the OECS member states in the educational uses of ICT. In particular, it will provide the input of Member States into the work of the OERU and will provide leadership in the national dissemination of the results of work carried out sub-regionally.
- III. The OERU shall be responsible for the organization, facilitation and provision of secretariat services to the committee.

#### **2. MANDATE:**

- I. Committee members shall provide advice and information to the OERU so that sub-regional activities are responsive to the current needs of member states.
- II. Committee members shall provide leadership in their own states in implementation and disseminating the results of sub-regional ICT education activities.
- III. Committee members shall together promote the harmonization of activities, approaches and standards in the educational uses of information technology among the nine member states.

#### **3. COMPOSITION:**

- I. Each Ministry of Education shall designate one technical specialist to be its representative on the Committee.
- II. Members should have experience as classroom teachers and should be familiar and comfortable with the routine use of computers, including the use of electronic mail and the Web.
- III. Ministries will need to ensure that its member of the Committee has routine access to an internet-linked computer. This is critical, as the bulk of the Committee's work will be carried out via electronic communication.

**4. ACTIVITIES:**

**In order to fulfill this mandate, Committee members shall be involved actively in activities such the following:**

- I. Assessing the needs, capacity and progress of ICT at the national level and advising the OERU of the results of such assessments.
- II. Organizing local workshops to share knowledge and information about the educational uses of ICT with their colleagues in the education system.
- III. Participating in training activities, workshops and meetings as may be organized.
- IV. Promoting the development of software packages by students and teachers.
- V. Participating in the piloting and evaluation off instructional software.
- VI. Supporting the classroom implementation of selected software packages, including the training of teachers and assessment of progress and results.
- VII. Sharing and disseminating information about educational uses of the Internet, particularly information about useful sites.
- VIII. Ensuring effective communication between Ministries of Education and the OERU on all matters related to the educational uses of ICT.
- IX. Maintaining regular contact with the OERU and with other Committee members primarily via e-mail and the OERU ICT Discussion forum.
- X. Facilitate the visit of external consultants.

**5. FINANCING:**

- I. The provision of secretariat services to the Committee will be borne by the OERU.
- II. Ministries of Education will need to support their national members of the Committee with sufficient release time to carry out their Committee duties. Initially, an estimated five hours per week will be required.
- III. The primary form of communication between committee members will be via the Internet (email, OERU ICT Discussion Forum etc). However, at least one annual face-to-face two-day sub-regional meeting is planned initially. Attendance cost for national members to this meeting will, for the first two years, paid for by ECERP.

**6. REVIEW:**

**The TORs of this Committee shall be reviewed annually by the OERU.**

## **APPENDIX 3**

### **Core Job Functions and Responsibilities of the Core Staff**

The following job descriptions for OERU core staff are presented to refocus the Unit on core functions, by responsibilities and required skill sets. Core functions establish the *raison d'être* for each job.

#### **a. Head of OERU**

**Core Function:** To maintain OERU's Vision and provide effective leadership and management in pursuit of the Unit's Mission and Corporate Goals.

**Duties and  
Responsibilities:**

- Reports to the Director, Functional Cooperation of OECS Secretariat.
- Leads OERU's management team in the development, review and adjustment of the Unit's integrated planning process (i.e. strategic planning, operational planning and results management).
- Spearhead OERU's corporate marketing activities: pro-actively engage in networking, representation and negotiations for the benefit of OERU, OECS and the Member States.
- Ensure timely activation of proposals, agreements and contracts between Funding Agencies and OECS/OERU.
- Ensure timely mobilisation of appropriate resources to facilitate implementation of OERU's programme and project activities on behalf of the OECS Secretariat and the Member States.
- Oversee and coordinate the operations of the major functional areas of OERU towards maintaining focus on priority targets: review and approve sectional and programme work plans and budgets annually; monitor progress monthly; prepare quarterly and annual reports and analyses of OERU's operations.
- Lead monthly management and quarterly staff meetings for updates on corporate developments and discussion of relevant issues.
- Plan, convene and service meetings of the OECS Education Reform Council, the OECS Technical Education Committee (OETEC), Technical Advisory Committees (TACs) and other technical or management committees established by the Council.

- Liaise with national education officials to guide and facilitate implementation of strategic and operational plans for the advancement of the OECS Education Reform Strategy.
- Prepare papers, briefs, reports and other documentation on education reform strategies and related activities as required for:
  - OETEC
  - the OECS Education Reform Council
  - the OECS Authority
  - the Director General of OECS
  - The Director, Functional Cooperation.
- Maintain management information and control systems for the efficient results management of OERU's operations and reporting personnel.
- Complete relevant performance reviews for reporting staff within agreed time frames.
- Undertake other relevant assignments for the benefit and development of OERU.

**Education Level  
and Major Skill  
Sets Required:**

**Education:** Post Graduate degree in Education Management or Business.

**Leadership skills** (Visioning, Motivation)

**General Management Skills** (Planning, Organising, Resource Scheduling, People Management)

**Technical Skills** (Education Management, Project Management, Negotiations, Financial Analyses)

**Experience:** At least 5 years at management level in a public sector environment.

## **b. Programme Development Officer**

**Core Function:** To develop, coordinate and facilitate implementation of a sustainable portfolio of education reform and development programmes which are congruent with the OECS Education Reform Strategy and with the Mission and Goals of OERU.

### **Duties and Responsibilities:**

- Report to the Head, OERU.
- Participate in the development, review and adjustment of OERU's integrated planning process; attend and contribute to OERU's management meetings.
- In consultation with the Head, OERU, initiate and participate in networking, representation and negotiations aimed at securing and maintaining education reform and related programmes for the benefit and satisfaction of the Member States.
- Prepare relevant proposals, agreements and contracts for approval by OERU/OECS and Funding Agencies.
- Make appropriate arrangements for the conduct of research on issues related to education reform; utilise research findings to development of relevant solutions.
- Maintain management information and control systems for the efficient results management of the programme development portfolio.
- Liaise with Programme Managers to keep abreast of relevant developments and to ensure congruence of activities.
  - Attend TAC meetings, as required.
- Undertake other related assignments for the benefit and development of OERU.

### **Education Level and Major Skill**

**Sets Required:**

**Education:** Post Graduate qualification in Education Planning or Education Management

**Project Management Skills** (Planning, Scheduling, Monitoring, Results Management)

**Communications and Interpersonal Skills** (Negotiations, Networking, Report writing and presentation)

**Technical Skills** (Proposal development and presentation, Trend analysis, Research methods)

**Experience:** At least 5 years developing and managing projects in a public sector environment.

### c. Systems Administrator

**Core Function:** To develop and maintain integrated communication and information technology systems to support OERU's operations.

**Duties and Responsibilities:**

- Report to the Head, OERU.
- Participate in the development review and adjustment of OERU's integrated planning process.
- Implement and maintain an integrated information technology system to enhance internal OERU communications analysis and reporting and to facilitate external communication links with OECS, the Member States and Funding Agencies: maintain OERU's website; provide preventive maintenance to computer systems; manage the LAN.
- Undertake regular back-ups and disaster recovery measures for all data at OERU.
- Develop and maintain adequate security systems to protect the Unit's IT system from viral attack and unauthorised access.
- Provide technical support to staff on the maintenance and care of assigned hardware, and use of software.
- Develop and maintain communication protocols to govern and facilitate access to the Unit's systems and databases, as appropriate.
- Undertake other related assignments for the benefit and development of OERU.

**Education Level and Major Skill Sets Required:**

**Education:** Diploma in IT Management; Microsoft Systems Administrator (MCSA) Certification

**Project Management Skills** (Planning, Scheduling, Monitoring, Results Management)

**Communications and Interpersonal Skills** (Networking, Report writing and presentation)

**Technical Skills** Computer maintenance; database development and management; web development

**Experience:** At least 2 years experience in LAN Management





**d. Administrative Officer**

**Core Function:** To organise, supervise and facilitate delivery of OERU's administrative and personnel services to the satisfaction of internal customers.

**Duties and Responsibilities:**

- Report to the Head, OERU.
- Participate in the development, review and adjustment of OERU's integrated planning process.
- Organise and coordinate OERU's receptionist, secretarial and general office support services for courteous reception of visitors and callers, high quality document production and office communications.
- Maintain accounting systems and procedures for prompt and accurate recording, analysis and reporting of OERU's financial transactions in accordance with the compliance requirements of the OECS Secretariat and Funding Agency contracts.
- Ensure up-to-date maintenance and efficient operation of OERU's documentation centre and filing system.
- Maintain adequate inventories of office stationery and supplies; establish re-order points and place orders as appropriate.
- Maintain NRMU's confidential personnel records and related calendar of events on an up-to-date basis.
- Maintain appropriate records and ensure that OERU's property and equipment are maintained in good order.
- Provide administrative and secretarial support to the Management and Programming Teams at OERU.
- Ensure timely preparation of documentation, communication with participants and logistical arrangements required for OECS and related meetings, seminars, workshops, etc.
- Complete relevant performance reviews within agreed time frames.
- Undertake other related assignments for the benefit and development of OERU.

**Education Level  
and Major Skill  
Sets Required:**

**Education:** Associate Degree in Business Management or Public Administration

**Interpersonal Skills** (Communication, Motivation, Negotiation, Human Relations)

**Organisational and Supervisory Skills** (Delegation, Planning, Scheduling, Results Management)

**Financial Management Skills** (Interpretation, Analysis)

**Experience:** At least 2 years relevant experience.

#### **e. Secretary/Receptionist**

**Core Function:** To facilitate the efficient operation of OERU's document production, communications and reception services.

**Duties and Responsibilities:**

- Report to the Administrative Officer
- Contribute as required to the development of work plans and budgets for the Administration Section.
- Perform secretarial duties: As required, schedule and organise meetings; prepare and distribute agendas, reports, preliminary analyses, etc; perform word processing and data entry functions.
- Receive and direct telephone calls, faxes, messages and visitors with a view to ensuring prompt contact between appropriate OERU personnel and interested members of the public.
- As required, assist with official travel arrangements on behalf of OERU staff and OERU sponsored resource person.
- On a monthly basis, reconcile usage of overseas telecommunications with approved requests for this service.
- Undertake other related assignments for the benefit and development of OERU.

**Education Level and Major Skill**

**Sets Required:** **Education:** 5 "O" Levels or equivalent CXC Certificates, including English; Professional Secretarial Diploma.

**Interpersonal Skills** (Listening, feedback, telephone techniques)

**Technical Skills** (Keyboarding, report writing, minute taking, analytical)

**Experience:** At least 2 years relevant experience.

#### **f. Accounts Clerk**

**Core Function:** To facilitate timely and accurate production and maintenance of OERU's accounting records.

**Duties and Responsibilities:**

- Report to the Administrative Officer.
- Maintain up-to-date records relating to OERU's financial transactions: prepare monthly financial statements and quarterly reports and analyses on the status of OERU's finances, in accordance with the compliance requirements of OECS and Funding Agency contracts.
- Prepare cheque vouchers and supporting documentation for payment to suppliers of goods and services.
- Enter accounting data on computer.
- Reconcile suppliers' statements, monthly.
- Prepare relevant statutory deductions (e.g NIS) for payment.
- Prepare accounting documents for archiving.
- Undertake other related assignments for the benefit and development of OERU.

**Education Level  
and Major  
Skill Sets Required:**

**Education:** 5 ("O") level or equivalent CXC certificates, including Mathematics.

**Technical Skills:** Basic accounting; numeracy; analytical report writing; computer skills (word processing, spreadsheets and database applications)

**Experience:** At least 2 years relevant experience.

***APPENDIX 4:***