PDI-BOL EDUCATION PROJECT EVALUATION REPORT

(Qualitative – Quantitative Study in the departments of Chochabamba, Santa Cruz, and Beni)

Associated Consultants
07/06/2011

Evaluation of the PDI-BOL institutional development project (2007 – 2011 period) to verify the results obtained as compared with the stated objectives, and the institutional learning that has taken place in regards to developing and improving educative practices.

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CHAPTER I. CONTEXT AND INTENT

1.1 Educational Context and objective of the evaluation

The quality of education and evaluation present a paradoxical situation in Bolivia. During the education reform of the 90s, there was not a great deal of discussion of quality; quality was applied in a technical sense as the gathering of information for education policies, and perhaps because of this, it was assimilated into evaluation and measurement of scholastic performance indicators. Under the current Socialist Movement (MAS) government, since 2006 the concept of quality was practically dismissed from the educative lexicon and neither could evaluations be carried out. Nevertheless, in the past few years, the introduction of the concept of "living well" as a basis for social policies has opened up new challenges for Bolivian education. In this context, quality and evaluation are discussed in order to try to open up new horizons.

Since 2006 the government of president Evo Morales has maintained a discourse on education that is virulently critical of the previous educational reform process initiated in 1994, which clearly brought with it a model for evaluation that has rarely been studied. This model of evaluation was part of the political vision for education at the time. The correlating curricular model emphasized children's learning of competencies and processes, among other things. In contrast, the current education policy has, since its beginnings, produced various documents reflecting the significance of the changes underway. For many this proposal constitutes a genuine national change, with an indigenous character that is evident in discourse on interculturality, decolonization, community, and respect for ancestral worldviews.

Currently there is an approved Law of Education, but it has not yet been objectively applied. Thus, many ask how the discourse of change will be translated into pedagogical practices in the classroom, materials, and evaluation—important questions for any educational policy.

This combined study (qualitative-quantitative) attempts to clarify the relationship between the quality of education, the evaluation of processes, and statistical measurements, concepts which are frequently confused with one another. Based on experiences from the education reforms of 1994 and the current situation, we can say that evaluation is a social construct that is debated and utilized as part of education policies in which there exist conflicts between worldviews and instrumental processes; thus, we saw it fitting not to reduce the concept of evaluation to purely technical criteria.

Educational quality and systems of Evaluation

In keeping with many experts' opinions (Santos Guerra, 1999; Weiss, in Picado, 2002, pp.13-14; McCormick and James, 1996; Parlett and Hamilton, 1989; MacDonald, 1989), we can maintain that evaluation is not a simple procedure or pedagogical technique. It is a social occurrence and an institutional and moral action. Thus, one of the lines of analysis used to approach evaluation is that of "quality," which has been strongly emphasized in the field of education in recent decades. This could be defined as a social construct in which the values and interests of the actors play an important role; in other words, it is not so much about "what it is," as its etymology could make one think, but rather, is determined by relationships.

Thus, quality is a space where meaning is created, as Dahlber, Moss, and Pence (2005) suggest; it is rooted in the social history and the location of education; it depends upon the curriculum as a policy that guides knowing, and also depends upon the subject, the concept of childhood and adolescence, teachers, educational institutions, international bodies that influence the application of innovative policies and proposals, and society as a whole.

Education policies and reforms

Bolivian education policy in the 90s, probably under the influence of international tendencies, associates quality with criteria of efficiencies, effectiveness, appropriateness, relevance, and equity—although this last point of focus was added later—as described in various documents and reports issued by the Latin American Laboratory for Educational Quality (LLECE), the Program for Promoting Educational Reform in Latin America and the Caribbean (PREAL), and the Regional Project for Education in Latin America and the Caribbean (PRELAC), all organizations which are dedicated to supporting education policies in various countries in the region (UNSECO/LLECE, 2008a, pp.6-11;20 8b).

These criteria were not discussed in Bolivia during the educational reform (1994-2004), nor are they discussed today. Thus, we must remember that not all of these criteria are suitable to the same types of analysis. Efficiency and effectiveness are business categories dating back many years, and share a technical, rationalistic view of education. From the beginnings of the 20th century, under the influence of the Taylorian spirit, schools were asked to achieve results and outputs at a lower cost, and to reach their goals within shorter timeframes. In the 50s and 60s, the topic was addressed in terms of the State's economic investment in education, and its impact on countries' development. In Bolivia, during the 1970s, the dictatorial government of general Hugo Banzer put its own peculiar spin on this developmentalist technicalism,

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linking education to an abstract Catholicism and to objectives-based performance.

In the 1980s and 1990s, the topic surfaced again through "effective schools," born out of sociological research on the role of the school in producing differences or creating opportunities in the 70s. The pattern of thought was the same; the difference is that this time the focus is on schools as organizations and units of management which must "render accounts" of what they receive. In contrast to these criteria for institutional analysis, others such as equity, relevance, appropriateness—and in Bolivia we can also add the criterion of interculturality—fall into a different category, and lack sufficiently clear or established indicators.

Experiences of evaluating the quality of education in Bolivia

In the effort to understand quality, various studies demonstrate the following advances: the number of years of mandatory schooling has increased in recent decades, increasing from five in the 1970s to eight with the education reforms, and now to twelve with the New Political Constitution of State (CPE); scholastic coverage has increased, reaching 95% of the population by 2001; new curricula and systems of evaluation were designed, as was the case in the education reform of 1994; the distribution of educational materials was improved (production of modules or textbooks during the reform, and supplying libraries and classrooms with them), as was school infrastructure (construction of new facilities from 1995 to 2004); investments were made in transforming initial training of teachers, thus, some Normal Superior Institutes (INS) [high-school level institutions providing teaching degrees] were upgraded to university status between 2000 and 2004, in order to improve the quality of institutional and curricular management.

As in various Latin American countries, the Bolivian education system tended towards decentralization and strengthened educative nuclei and districts, for example, by delegating powers to the municipalities to make decisions about providing complementary nutrition (school breakfasts), infrastructure, and equipment. This promoted greater community participation in education, providing a space for parents, organized through school boards, to participate in school decision-making and management, although the impact of this on school performance is, as yet, unkown (Carnoy, 2004; Yapu, 2007).

All of this is related to improving educational quality. Although in Bolivia there exists the System of Educational Quality Measurement and Evaluation (SIMECAL), the quality of education was not amply discussed; rather, treatment of this topic was limited to the evaluation. It's probable that the tests, which are established by international networks,

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have been technically consistent, but this was not publicized. The results of the evaluations demonstrated successful learning in some areas of knowledge such as mathematics and language. On the other hand, in regards to associated factors—in other words, social, cultural, or other factors that could affect the levels of achievement, the physical conditions of the schools and classrooms, etc.—the SIMECAL was almost completely aligned with the LLECE project.

Later on, the evaluation of the Faith and Joy schools included, as part of educational quality, quantitative academic performance factors and subjective, qualitative factors related to the attitudes of educators towards the process of teaching-learning, school dynamics, and the curriculum, as well as to teachers' satisfaction and their opinions of the functioning of the school and of classroom dynamics, and also families' opinions on various aspects of school life and their relationships to the community (Faith and Joy, 2008)[1]. Equity is one of the latest criteria to be integrated into the definition of quality. According to the study carried out by Ávila *et al* (2009), in Bolivia there are two arguments for equity: on one side, it refers to state policies that seek to reduce the disparity between gender in the context of rural or urban regions, or of ethnic groups; on the other side, it responds to the compilation of information to demonstrate results and goals reached in the framework of complying with the Millenium Development Goals and the Education for All goals (Ávila *et al*, 2009, p. 147).

Educational quality through Christian principles and values

PDI-Bol has proposed to introduce its own concept of educational quality, based on Christian values. This proposal seeks to define a strategy of adjustments to the current Preschool, Primary, and Secondary curricula in such a way as to not contradict the State directions, but that at the same time directs them as much as possible towards a Christ-centric proposal (Saavedra, 2009). These following basic principles are suggested in the proposal, "Towards quality education through Christian principles and values":

- Quality education through principles and values, manifested in students through a comprehensive identity, comprehensive competencies, and relational style.

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[1] The study of this institution used four categories as indicators for evaluating educational quality: 1) Context: the family environment and its socioeconomic level. 2) Resources: human resources, especially in terms of the quantity of people and the teacher/student ratio; materials; size and quality of infrastructure. 3) Processes: management and leadership styles; resource management; training. Processes of teaching-learning and evaluation, management of social relationships. 4) Results: in different areas, conceived of as human, linguistic, and mathematical training (Faith and Joy, 2008, pp. 29-36).

- The best and greatest community participation, valuing the family as the first space for teaching and learning.
- Continuous professional development for teachers, re-valuing their role as agents of change.
- Continuous adjustments to the scholastic curriculum, updating and contextualizing plans and programs.
- Outfitting classrooms to use audiovisual media and productive teaching.
- Implementing a system of monitoring and evaluation at various levels to monitor progress towards goals and the success of processes.

Background of the Institutional Development Project

The Swedish Free Mission in Bolivia (MSLB), taking into account needs in the field of education, signed an agreement of cooperation with the Government of Bolivia, and since more than 25 years ago, has promoted projects in the area of education, contributing infrastructure and thus contributing to the creation of around 30 Educational Units distributed among five departments (Beni, Cochabamba, Santa Cruz, La Paz, and Tarija). These schools are located in the most needy areas in rural and subsistence-farming communities (PDI-Bol, 2007).

The PDI-Bol institutional development project, carried out since the 2007 – 2011 period through the Foundation for Education and Service, has proposed to improve the quality of education in the units (schools) that work with the MSLB, through educational strategies that strengthen Christian principles and values throughout the Educational Community.

Thus it's relevant to evaluate the Educational Units that work in partnership with FES, in order to promote good practices related to achieving the overarching goal of transforming the Educational Units into centers of pedagogical innovation offering quality education, responding to basic learning needs, and in which children and adolescents develop productive and competitive capacities.

To date, the PDI-Bol, as a project in the area of education, has proposed carrying out the following strategies, or five fundamental pillars, for achieving the overarching goal of "Quality education through Christian principles and values":

- Participation of the Educational Community
- Professional development of teachers
- Specializing and outfitting classrooms
- Updating plans and programs
- Monitoring and evaluation

1.2 Objectives, Scope, and Limits of the Study

1.2.1 General objective of the study:

Verify the results obtained respective to the objectives proposed through the monitoring and evaluation system, as well as the institutional learning that has taken place at the close of the five-year period, in order to develop and improve educational practices.

1.2.2 Specific objectives

- Report on the project's level of efficiency and effectiveness during its first 5 years of life, thus contributing to decision-making processes related to the funded programs in question.

- Reflect the current exercise of institutional control over activities, evaluating the efficient use, towards the agreed-upon goals, of resources provide by NORAD and other donors.

- Promote institutional learning in order to develop and improve educational practices.

1.2.3 Title of the Study:

Evaluation of the PDI-Bol institutional development project (2007 – 2011 period)

1.2.4 Duration of the Study:

The study took place between the following starting and ending dates for the evaluation process:

- Project started: 27 April 2011
- Final report presented: 7 June 2011

1.2.5 Scope of the Study

The investigation in question will have as its scope the measurement of PDI Institutional Development Project results and products, evaluating the achievements of the 2007 – 2011 period in reference to the institutional objectives outlined in the agreement, using a basis the document "Monitoring and Evaluation Plan" provided by the contracting party, which provides directions on the variables and indicators to be measured. It's worth mentioning that in keeping with PDI-Bol requirements, for the evaluation of effectiveness (results obtained), the corresponding indicators were evaluated through June 2010 (Appendix ii).

1.2.6 Limits of the Study

The process of evaluating the project has suffered from the following limitations:

- An important percentage of the technical information on the PDI-BOl project supplied, such as files on directors, reports of compliance with agreements signed with the Basic Educational Units, etc., were provided in documents that are NOT in a FORMAL format; in other words, in some cases it could not be confirmed 1) whether these documents are approved, 2) the date at which they entered into force, 3) whether they are available in the corresponding place or archive, 4) whether they are filed in an orderly manner making it easy to access them. (These aspects are described in detail in the description of the results of the PDI-Bol and CEN management evaluation).

- The resignation or suspension of some of the functionaries responsible for executing the project during the 2007 – 2011 period, both within PDI-Bol and at the Educational Units, has made it more difficult to analyze the project's evolution during this time, especially in terms of validating the relevance and the sustainability of its results and products, as well as the relationship between the project and other important initiatives within the educational and institutional context.

- In regards to the technical analysis of documentation of projects within the Educational Units, the evaluation has been complicated by inconsistencies between the planning documents and the execution reports, as well as, in some cases, lack of means of documentary verification of whether the project's intentions were fulfilled. (These issues are described in detail in the section on the results of the evaluation of management at the Educational Units).

- The relationships of coordination between PDI-Bol and the Educational Units Good News B and C, in the city of Santa Cruz de la Sierra, were described as conflictive; it was reported that there is little communication between the parties. These issues negatively affected the evaluation process and made it difficult to apply some of the evaluation instruments in a complete manner.

- The climate within the Educational Units in the process of being transferred to state control (Good News B and C) was greatly detrimental to the evaluation due to missing documentation which was explained as being the result of the change in internal authorities and institutional policies.

1.3 Methodology of the Evaluation process

This evaluation is based on a focus that integrates qualitative and quantitative information-gathering methods. Evaluation criteria derived from the ISO-9001 Quality Management Auditing System, as applied to educational institutions via IWA-2, were used. The LQAS methodology was used for sampling. Both these methodologies were used to evaluate the quality of processes.

Thus, the qualitative dimension will be represented through semi-structured interviews and field observation (teacher performance) which will allow us to better understand the educational and administrative reality at each Educational Unit studied.

Parallel to the qualitative component, quantitative methods such as surveys and check-lists, based on evaluation criteria to be developed, will be applied. These quantitative techniques will make it possible to evaluate precise indicators oriented to confirming whether institutional objectives established in the interinstitutional agreements have been achieved.

The results of both methods provided complementary information making it possible to obtain global results that include both statistically relevant data and the social implications of this date in each of the Educational Units and in the evaluated population as a whole.

1.3.1 LQAS specific sampling strategy

This method calls for planning and implementing Rapid Surveys with Lot Quality Assurance Sampling (LQAS).

LQAS is a form of **stratified sampling** that not only can provide estimates for the scope of the entire project, but also gives us information on what is happing in sub-areas, even while maintaining a relatively small sample size compared to the whole area under study.

We may find ourselves required to evaluate an education project and its progress towards its goals, in order to improve the educational results. We label this an "evaluation process," through which a project establishes the extent to which it has progressed towards a defined objective.

The principal goal is to obtain an estimate for the key indicators on the coverage of education, and to evaluate whether or not a pre-established goal level has been reached. In order to do this, the methodology of surveys was chosen, using appropriate sampling methodologies and sizes, which, as was explained, will easily provide information with sufficient statistical "power."

1.3.2 Sample size and characteristics

Due to the characteristics of the sample type, the evaluation carried out the process in 6 Educational Units, detailed as follows:

Table N°. 1

Region	N^o. of Educational Units	Name of Educational Unit(s)	Education Level
Cochabamba	1 Educational Unit	Good News "A"	Primary
Santa Cruz, urban	2 Educational Units	• Good News "B" • Good News "C"	• Primary • Secondary
Santa Cruz, rural	1 Educational Unit	Isabel Villegas Secondary School (Vallegrande)	Secondary
Beni, rural	2 Educational Units	• Philadelfia (Rurrenabaque) • Bethany (Riberalta)	Primary and Secondary (both)
Total Educational Units	**6 Educational Units**	• **4 primary** • **4 secondary**	

Within each Educational Unit, the following persons were evaluated:

- Director of the Educational Unit

- 2 parents who were representatives of the Management Team

- 2 teachers who were representatives of the Management Team

- Approximately 1130 students (evaluation of academic performance and satisfaction with educational service)

- Teachers from the Educational Units (central subject of the evaluation) as executing agents of the PDI-Bol curricular innovation program; we evaluated the extent to curricular innovations were applied by 38 teachers distributed among the Educational Units, divided in two groups:

  o 19 teachers who are beneficiaries of the PDPD teacher improvement program.
  o 19 teachers who are not participants in the program.

The goal was to monitor two lots of 19 people each (total 38 individuals), in order to comply with the minimum sample size (19) needed to ensure the collection of statistically valid information required for this evaluation process. This sample size ensures 95% validity.

1.3.3 Instruments and techniques used

1.3.3.1 Review of documentation. A general review was planned to contrast physical evidence of the following documents requested from both PDI-Bol and the Educational Units:

- Institutional Development Project (PDI-Bol and each Educational Unit)
- Annual Operation Plans (AOPs 2007 – 2011)
- Budgets for each year 2007 – 2011
- Budget execution reports (PDI-Bol and each Educational Unit)
- Curriculum plans for the Educational Units (annual, quarterly, and/or bi-weekly)
- Quarterly and/or bi-weekly teaching reports
- Minutes confirming formation of the Management Team
- Investment folders (2007 – 2011 periods)
- Internal memos, etc.

1.3.3.2 Surveys. Two types of surveys were used. The first was used to determine the level of the final clients'—the students'—satisfaction with the service. (Appendix 4.1)

The second was used to evaluate teachers' professional development. A self-evaluation questionnaire (Appendix 4.2) was given to 38 teachers, with a sample of 6 to 8 teachers taken from each Educational Unit (trained and not trained through the Teaching Improvement Program). The questionnaires were ranked on a scale of 1 to 5, according to the level of knowledge and implementation of educational practices oriented towards "Teacher Quality" (see appended survey results).

1.3.3.3 ISO-9001 quality management evaluation instrument, as applied to educational institutions via IWA – 2 (Appendix 4.1)

The IWA2 (International Workshop Agreement) is a document that issues recommendations and suggestions to facilitate the application of ISO-9001:2000 norms to educational institutions in order to improve the quality of education. It was directed to directors, parents, and teachers who were representatives of the Management Teams.

This guide directed the evaluations carried out in the Educational Units in regards to the following issues:

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- Philosophy of the Educational Unit (mission, vision, graduate profile)
- Monitoring and evaluation of administrative processes
- Evaluation of documentation
- Level of participation of the Educational Community
- Development and review of plans and programs of study
- Students' perception of the educational service, etc.

1.3.34 Field observation script. This was applied to evaluate teachers' performance in the classroom (one subject or class period), and the corresponding level of academic performance of the students as a result of what they had learned in the classroom during the period evaluated (Appendix 4.3).

Classroom observations were carried out for 38 individuals, 6 from each of the Educational Units except for Good News "A," where eight were evaluated, drawing from two groups (trained and not trained) whose questions were evaluated on a scale of 1 to 5, described as follows:

1=Neither planned nor applied in the classroom (significant need for development)
2=Planned, but not applied (need for development)
3=planned and applied in the classroom (competent)
4=applied successfully for 50% or more of the students (strengths)
5=applied successfully for 100% of students (significant strengths)

CHAPTER II. FINDINGS AND CONCLUSIONS

2.1 Results of the "QMS" Quality-Management System Evaluation of PDI-Bol and CEN

2.1.1 Theoretical Framework for "QMS" Evaluation

Every organization works using a logical system of processes which simultaneously constitutes a management system.

Among various tools used to evaluate organizations' management systems, ISO 9001:2008 Quality Management System evaluation or auditing stands out because of its usefulness, versatility, and focus on improvement.

These Quality Management Systems have the following components:

The ISO 9001:2008 standard consists of minimum requirements that an organization should comply with in order to demonstrate that its management includes a focus on quality that is "sustainable in time." These requirements are developed taking into consideration the following areas of focus:

Strategic Focus: evaluation of the components describing the identity, purpose, and strategic vision for the future of the organization.

Focus on Processes and Structure of Documentation: analysis of the processes carried out in the organization, determining whether these are formally established and if they are carried out efficiently. This analysis includes reviewing the documentation and registries that confirm the execution of the processes carried out.

Focus on Resource Management: establishes and evaluated the principles of planning, execution, and monitoring of resources made available to the organization. These resources are:

- Financial
- Human Resources
- Infrastructure, Equipment

Focus on Provision of Services or Execution of Programs: evaluates processes of providing services. Includes planning, execution, monitoring, and improvement of processes carried out to provide the service.

Focus on Measurement, Analysis, and Improvement: analysis of criteria related to follow-up, monitoring, and evaluation that the organization ought to realize, through data that generate information used to make timely decisions focused on continuous improvement. This focus area also includes processes related to responding to complaints, taking corrective and preventive actions, and evaluating clients' satisfaction.

The tools used in the "QMS" evaluation of the PDI are oriented towards evaluating these focus areas (see Appendix 4.1).

The evaluation was carried out through interviews with relevant personnel, during which representative cases were reviewed on a sample basis.

The findings are categorized in the following manner:

- CRITICAL NONCOMPLIANCE: TOTAL noncompliance / unfulfillment of a requirement or document (procedure, instruction, specification, manual) and/or when there are critical risks to or attempts against compliance with the requirements of the client/beneficiary or the organization's strategic objectives.

- MINOR NONCOMPLIANCE: PARTIAL noncompliance / unfulfillment of a requirement or internal document, PARTIAL impact in compliance with the client's or the organization's requirements.

- OBSERVATIONS: Finding, situation, or event which if left unconsidered and UNTREATED could generate a NONCOMPLIANCE. Finding, situation, or event that is OUT OF LINE and of minor impact.

- POTENTIAL FOR IMPROVEMENT: Recommendations that the organization may consider carrying out.

In addition, each of the QMS evaluation's findings was categorized on the following scale in accordance with [the subject's] knowledge of the issue and the applicability of this issue:

"A"	Doesn't know how to do it, never has done it	0% compliance
"B"	Knows how to do it, but never has done it	1 – 20% compliance
"C"	Does it, but has not evaluated results in order to improve them	21 – 50% compliance
"D"	Does it, evaluated results, and can identify actions for improvement	51 – 60% compliance
"E"	Does, evaluates results, and improves systematically. In other words, there is trustworthy evidence demonstrating continuous improvement.	61 – 100% compliance

2.1.2 Evaluation PDI-Bol's Quality Management System "QMS"

The evaluation of PDI-Bol's Quality Management System is divided in two parts, differentiated by emphasis, scope, responsible parties, and processes carried out:

- "QMS" evaluation of PDI-Bol administration
- "QMS" of (selected) Educational Units working under agreement with PDI-Bol.

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The following personnel were interviewed:

- Mr. Zenón Taboada   FES PRESIDENT
- Mrs. Rosemary Apoza   CEN PRESIDENT
- Mr. Daniel Uchani   CEN VICE PRESIDENT
- Mr. Hiberth Rojas M.   PDI-BOL NATIONAL DIRECTOR
- Mr. Henry Arce C.   FES ACCOUNTANT
- Mr. Raúl Baltazar   PDI-BOL MONITORING/PLANNING

2.1.2.1   **Strategic Focus**

a.   **Mission, Vision, Values**

The Foundation for Education and Service (FES) has established the following as principle components of its lines of strategy:

- MISSION: Activate the potential of institutions and leaders committed to the mission of the gospel, achieving a global gospel impact.

- VISION: Be an organization that transforms through God's power, giving public testimony of His word through institutions and leaders empowered to serve those most in need.

The PDI-Bol project has established the following Mission/General Objective:

- The transformation of the MSLB's Educational Units into centers of pedagogical innovation that offer quality education responding basic learning needs and developing children's and adolescents' productive and competitive capacities.

We report the following findings in relation to these lines of strategy:

NON-CRITICAL: No evidence could be found to indicate that that activities related to circulation, analysis, and monitoring of these lines of strategy had been carried out. Those that are expressed are found only in some

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documents such as the Annual Report of Internal Taxes (FES) and the Strategic Project for Institutional Development (PDI-BOL).

Many of the processes and activities carried out, and the results obtained, do not fall within the framework of these lines of strategy. For example:

- One component of FES' Mission and Vision is "the public testimony of the Word of God"; but in the case of the PDI-Bol project, no intentional, direct actions have been taken to fulfill this statement.

- Another component of FES' Mission and Vision is "to activate the potential of institutions and leaders committed to the comprehensive mission of the gospel"; however, in the case of the PDI-Bol project, through the pillar related to qualifying teaching personnel at the Educational Units, actions have been taken to improve the teachers' technical competencies, but no actions have been take to form committed institutions and leaders. The PDI-Bol project has signed agreements with Educational Units that declare themselves to be non-Evangelical.

- PDI-Bol has established as its general objective the transformation of the Educational Units of the MSLB, but the target group has been modified, including agreements with Educational Units that are not aligned with the MSLB and with others that declare themselves to be non-Evangelical.

MINOR NONCOMPLIANCE: No actions have been taken to monitor the alignment of the lines of strategy, MSSION, and VISION of the Educational Units with PDI-Bol's general objective. All the Educational Units' annual plans of operation (AOPs) use the same wording found in the five-year strategic project document for the PDI-Bol institutional development project.

MAJOR NONCOMPLIANCE: There is no formal process with specific requirements for incorporating Educational Units into the PDI-Bol project; the process of selecting and qualifying the Educational Units incorporated into the project has been carried out without defined criteria, and even strategic decision-making authorities like the CEN have been unable to intervene effectively. As well as using a PROFILE OF THE DESIRED GRADUATE, a PROFILE OF THE EDUCATIONAL UNIT should also be used in considering with whom the project will work.

b. Planning and Execution of Objectives

CRITICAL NONCOMPLIANCE: The document "Strategic Five-Year Project for Institutional Development PDI-Bol" does not include a precise definition of the objectives, indicators of results, means of verification, responsible parties, deadlines, etc.

The methodology for measuring these objectives has not been defined. While the activities specified in the Annual Plans of Operation (AOPs) are linked to objectives, to date it is impossible to clearly determine the extent to which the established goals have been reached.

Table N° 2

Category of Objective			Strategic Objectives	Goal for 2011
1	GENERAL OBJECTIVE	1	Transform Educational Units into centers of:	23 of the MSLB's Educational Units are transformed
			Pedagogical innovation	
			Quality education	
			That respond to basic needs	
			and develop children's and adolescents' productive and competitive capacities	
2	INTERMEDIATE OBJECTIVES	2.1	Succeed in getting stakeholders within the Educational Community to participate in prioritizing needs and executing the project in order to transform the Educational Units into centers of innovation.	Parents, teachers, students, and authorities are committed to the institution and the vision.
		2.2	Qualify teaching personnel	20 directors
				400 teachers have become experts in managing educational processes and using cutting-edge technology.
		2.3	Transform classrooms into learning laboratories.	All classrooms are outfitted in ways appropriate to the subjects being taught there, with appropriate furniture and equipment, a specialized library, teaching materials, and audiovisual materials.
		2.4	Adapt plans and programs of study	All the Educational Units have plans and progams adapted to [local] needs, developed in coordination with stakeholders in the Educational Community and authorities from institutions of higher learning.

POTENTIAL FOR IMPROVEMENT. It is recommended that a defined methodology be used for Strategic Planning and Operative Planning, thus ensuring strategic and operative coherence between the following:
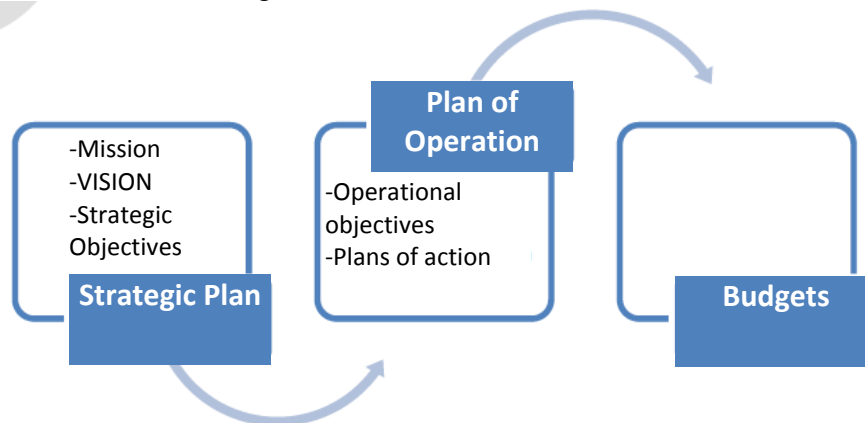
CRITICAL NONCOMPLIANCE. The budget established in the project is modified within the same document by the inclusion of point 14 (Other Questions and Important Issues), which, through a non-objective opinion, asserts that the budget should be increased to acquire library materials.

It's impossible to find clear evidence relating the amounts disbursed each year by the project's financier to the amounts required by the project and approved by the financier.

Comparison, PDI-Bol Investment Plan (expressed in USD)

Table Nº 3	2007	2008	2009	2010	2011	TOTAL
Amounts budgeted in PDI BOL document	87,600.00	84,600.00	84,600.00	39,400.00	38,800.00	335,000.00
Amounts budgeted as modified in the same document	107,600.00	104,600.00	104,600.00	59,400.00	58,800.00	435,000.00
Amounts reported in report to PYM (18/05/2011)		159,567.38	147,789.58	96,936.44	90,351.82	495,645.22
Amountsreported by the FES accounting office	113,958.00	161,609.00	211,640.72	198,601.77		685,809.49
NOK to USD exchange rate		6.1	5.95	5.9	5.5	

c. Focus on Results / Client

CRITICAL NONCOMPLIANCE: A GRADUATE PROFILE for the students the PDI-Bol project seeks to form through its work in the Educational Units has not been established in a clear, measurable manner. The organization makes its plans based on activities, not results. The methodology to be used for measuring the student PROFILE in primary and/or secondary schools has not been determined.

2.1.2.2 Focus on Processes and Structure of Documentation

CRITICAL NONCOMPLIANCE: There is no clear definition of the parties responsible, activities, procedures, documents, and registries to be preserved, that would allow the organization to establish a clear, efficient structure of internal and external processes. For example, Planning Process, Process for Selecting Educational Units, Outfitting Process, etc.

CRITICAL NONCOMPLIANCE: Many of PDI-Bol's important documents—projects, plans, manuals, forms, agreements, reports—are not controlled en regard to formal (approved) versions, definition of persons responsible for their custody, assurance of preservation of registries, etc. For example:

- Strategic Five-Year Institutional Development Project: It's not possible to directly prove approval by FES, CEN, and the Financier. The document lacks date that would make it possible to trace its history, the date of issuance, and those responsible for writing, reviewing, and approving it. Modifications made to the project document, such as the target group and the budgets, have not been formally documented and backed up.

- Annual Plans of Operation for 2007 to 2010. In these documents there is no evidence of approval by FES, CEN, and the Financier. The versions marked as AOP 2007 – 2010 are in the format of reports, not of plans, which should include objectives, goals, indicators, responsible parties, deadlines, budgets, etc.

- Economic and Pedagogical Reports. Not all the reports written are available, nor is there evidence of improvement actions based on these reports. For example, the 2007 – 2010 periods.

- Of the fourteen Educational Units that have signed agreements with PDI-Bol, Requests of Incorporation (FORM 01-PDI) are only on file for seven. Moreover, for these seven, it's impossible to determine the date on which the request was filed, since all the forms have the project duration period written into the "date field"— 1.4.07 to 31.12.11.

- Of the fourteen Educational Units that have signed agreements with PDI-Bol, there are Project Contracts (FORM 02-PDI) on file for only eleven. These eleven contain many errors that legally invalidate them. For example, in the body of the document there are spaces left blank (where the Educational Unit's names should have been filled out). Furthermore, there is no evidence of the date that these contracts were signed on.

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POTENTIAL FOR IMPROVEMENT. A methodology for creating and monitoring AOPs, based on that used for developing the 2011 AOP, should be defined.

2.1.2.3 Focus on Resource Management

a. Financial Resources

CRITICAL NONCOMPLIANCE. The Accounting department does not have all the forms established as components of the Educational Units' investment folders. It's not possible to confirm, in every case, the documentation confirming receipt of equipment purchased by the Educational Units. For example:

- The following was appended to Expense Receipt CE-010020: 1) FORM C 02 Purchase Order, dated 12.1.10 (2 televisions, 2 whiteboards), 2) FORM C 04 comparison of quotes, 3) Receipt 2704, dated 18.1.10, for the purchase of 1 Epson projector, at the price of 4,473 Bs., 4) receipt 5560, dated 18.1.10, for the purchase of 2 Phillips televisions and 2 DVD players. However, there is no FORM C 07 List of Equipment Acquired, or equivalent documentation, to confirm the reception of these products. During the visit by CEN and PDI personnel to the Educational Unit on 27.4.11 it was evident that this equipment did not arrive at the school. Thus, total compliance with the Allocation and Purchase Procedure by the Educational Units is not evident.

MINOR NONCOMPLIANCE. A formal, approved version of the FES Financial Manual is not kept on hand, nor is the Allocation and Purchas Procedure for the Educational Units.

CRITICAL NONCOMPLIANCE. While FES and PDI do undergo external accounting audits each year, these do not include reviews of the Educational Units. There is no evidence of internal controls within the Educational Units, such as a complete and correct file of the investment folder forms or inventory lists.

There are several reports from monitoring visits to the Educational Units carried out by CEN, FES, and PDI teams which contain findings of irregular purchases, assets that were not received, and lost assets. Yet there is no evidence that internal control actions were defined or carried out [in response to] these reports. For example:

Report on meetings with the management team issued in May 2011 by FES Accounting, in relation to findings on equipment supposedly acquired by the Cotoca National Educational Unit from COMERCIAL GUTIERREZ; this report states that said business sells paint, not electronics. According to Accounting records, on three different occasions televisions were supposedly purchased from the business Comercial Gutierrez.

CRITICAL NONCOMPLIANCE: There is a lack of clarity in defining processes of disbursing financial resources in relation to monitoring processes, for example:

- In 2009 the Philadelphia Educational Unit supposedly requested a disbursement for purchasing books, and sent the requirements and documentation to Accounting, but the disbursement was not effected during that year.

- The results of the intermediate objective related to qualification of teaching personnel has not been monitored in detail, and the final level of fulfillment of this objective is very low (6%), but even so, regular disbursements to the Evangelical University continue.

OBSERVATION. Actions should be taken to ensure the swift availability of accounting records that confirm all [financial] movements and that make it possible to trace them. Receipts are appended to the annual financial reports, but are not organized in any particular way; the report lacks data necessary for tracing all the information presented in the Income and Expenses Statement. The information stored in the accounting system for the period from 2007 to 2009 is not easily recoverable.

OBSERVATION. Methodology and requirements should be defined for filing all accounting records: volumes that should be bound, kept in three-ring binders, filed, etc.

b. Human Resources

CRITICAL NONCOMPLIANCE: The organization has not defined the required JOB DESCRIPTIONS. The files on current PDI-Bol personnel are incomplete, lacking documentation of these individuals' professional training, experience, etc. There is no formally established procedure for selecting and hiring personnel.

OBSERVATION: While an Employee Duties Manual has been written, it should be revised to include more details regarding who is responsible for items such as Project Contract Forms (FORM 02-PDI) and Investment Folders, and for Internal Controls and other important issues.

OBSERVATION: While the Employee Duties Manual has been recently updated, actions should be taken to ensure that all personnel understand and comply with the rules established in the manual. This document should also cover issues related to Evaluations of the previous period's Performance.

2.1.2.4 Focus on Program Execution

The results in this area are described in detail in the following section of the report—to make this report easy to understand, we decided to organize the information by strategic pillars.

2.1.2.5 Focus on Measurement, Analysis, and Improvement

a. Monitoring

CRITICAL NONCOMPLIANCE: In the fourth year of the five-year life of the PDI-Bol project (90%), there has been no formal measurement of the extent to which established goals have been reached, nor has there been any evaluation of the extent to which cognitive, emotional, and spiritual results have been attained among children, adolescents, and youths. Based on our analysis of the interviews we carried out and the information we received, [we believe] the project's established goals have not been reached. For example:

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Table Nº. 4

Category of Objective		Strategic Objectives		Goal for 2011	Current Situation
1	GENERAL OBJECTIVE	1	Transform Educational Units into centers of: Pedagogical innovation Quality education That respond to basic needs and develop children's and adolescents' productive and competitive capacities	23 of the MSLB's Educational Units are transformed	14 units [schools] have signed agreements with the project
2	INTERMEDIATE OBJECTIVES	2.1	Succeed in getting stakeholders within the Educational Community to participate in prioritizing needs and executing the project in order to transform the Educational Units into centers of innovation.	Parents, teachers, students, and authorities are committed to the institution and the vision.	Some of the management committees are not functioning optimally (see Educational Units report)
		2.2	Qualify teaching personnel	20 directors	12 directors started the process, by only 4 finished (33%)
				400 teachers have become experts in managing educational processes and using cutting-edge technology.	476 teachers started the process, but only 165 finished (35%)
		2.3	Transform classrooms into learning laboratories.	All classrooms are outfitted in ways appropriate to the subjects being taught there, with appropriate furniture and equipment, a specialized library, teaching materials, and audiovisual materials.	While 100% of the Educational Units we evaluated are indeed outfitted, the majority of them do not use this equipment due to lack of training or because this equipment is perceived to be unnecessary. (SEE CURRICULUM EVALUATION REPORT)
		2.4	Adapt plans and programs of study	All the Educational Units have plans and progams adapted to [local] needs, developed in coordination with stakeholders in the Educational Community and authorities from institutions of higher learning.	(SEE CURRICULUM EVALUATION REPORT)

CRITICAL NONCOMPLIANCE: While responsibilities for monitoring, analyzing, and improving the activities carried out by PDI-Bol have been assigned, due to lack of resources assigned (CEN) or lack of clarity regarding the scope of these responsibilities (NATIONAL DIRECTOR – FES ACCOUNTANT – CEN), now, when 90% of the project's time period has elapsed, there are still no clear procedures nor a clear definition of responsibilities for these processes. As a result, evidence of compliance is also scarce.

b. Client Satisfaction

b.1 Background and Methodology of the Evaluation

The organization's management should have taken intentional actions to evaluation their clients' level of satisfaction. Such actions would play an important role in guiding decisions oriented to achieving real improvements.

The present evaluation measured the perceived level of satisfaction among clients (primary and secondary students) by administering a multiple-choice questionnaire (see Appendix 4.4.)

The following components were evaluated:

Components Evaluated	Students' overall level of satisfaction
	Relationships with teachers, director, and administrative personnel
	Teachers' pedagogical performance
	Perception of the Educational Unit's academic level
	Teaching and living out of moral and ethical values
	Infrastructure and equipment

The following measurement scale was used:

Measurement Scale	5=very satisfied
	4=satisfied
	3=moderately satisfied
	2=unsatisfied
	1=very unsatisfied

The sample population evaluated from the five Educational Units consisted of the following:
PRIMARY: 418 students
SECONDARY: 416 students

b.2 Results of the Evaluation

The following graph shows the evaluation of primary-level teachers. Students from the Educational Units Good News "A" (Cochabamba), Philadelphia and Bethany (Trinidad), and Good News "C" (Santa Cruz) demonstrate their satisfaction with the way topics are clearly explained by their teachers; moreover, their teachers instill in them the importance of not lying and of being respectful and responsible. As a result of these principles, relationships with teachers, the director, the regent, and the secretary are satisfactory (4.6 to 4.9 on the measurement scale).

These factors have contributed to students' decision to remain in school.

Graph N° 1

Legend: Good News "C"   Philadelphia   Good News "A"   Bethany

CRITERIA	Good News "C"	Philadelphia	Good News "A"	Bethany
Your teacher explains topics to you clearly	4,88	4,92	4,88	4,63
In this highschool they teach you values, not to lie, respect, responsibility.	4,90	4,95	4,78	4,67
How do your teachers treat you	4,55	4,65	4,23	4,07
How do the director, the regent, and the secretary treat [the students]	4,13	4,65	4,00	4,19
How do you feel at your highschool	4,38	4,70	3,95	3,81

SCALE

According to this evaluation, students at the secondary level in these 4 Educational Units are of the opinion that education at their highschool—teachers, materials, teaching materials, and principles like respect, founded on moral and ethical values—is satisfactory, being rated between 4.3 and 4.6 on the scale. The teachers' capacity to clearly transmit the material and their relationship with the students were evaluation as satisfactory, rating between 3.9 and 4.1 on the scale of 1 to 5.

One area cited as having opportunities for improvement was infrastructure, including restrooms, offices, and classrooms, all of which evinced the absence of maintenance necessary to provide comfort and safety for the students at these Educational Units. The following graph demonstrates the secondary students' opinions in greater detail:

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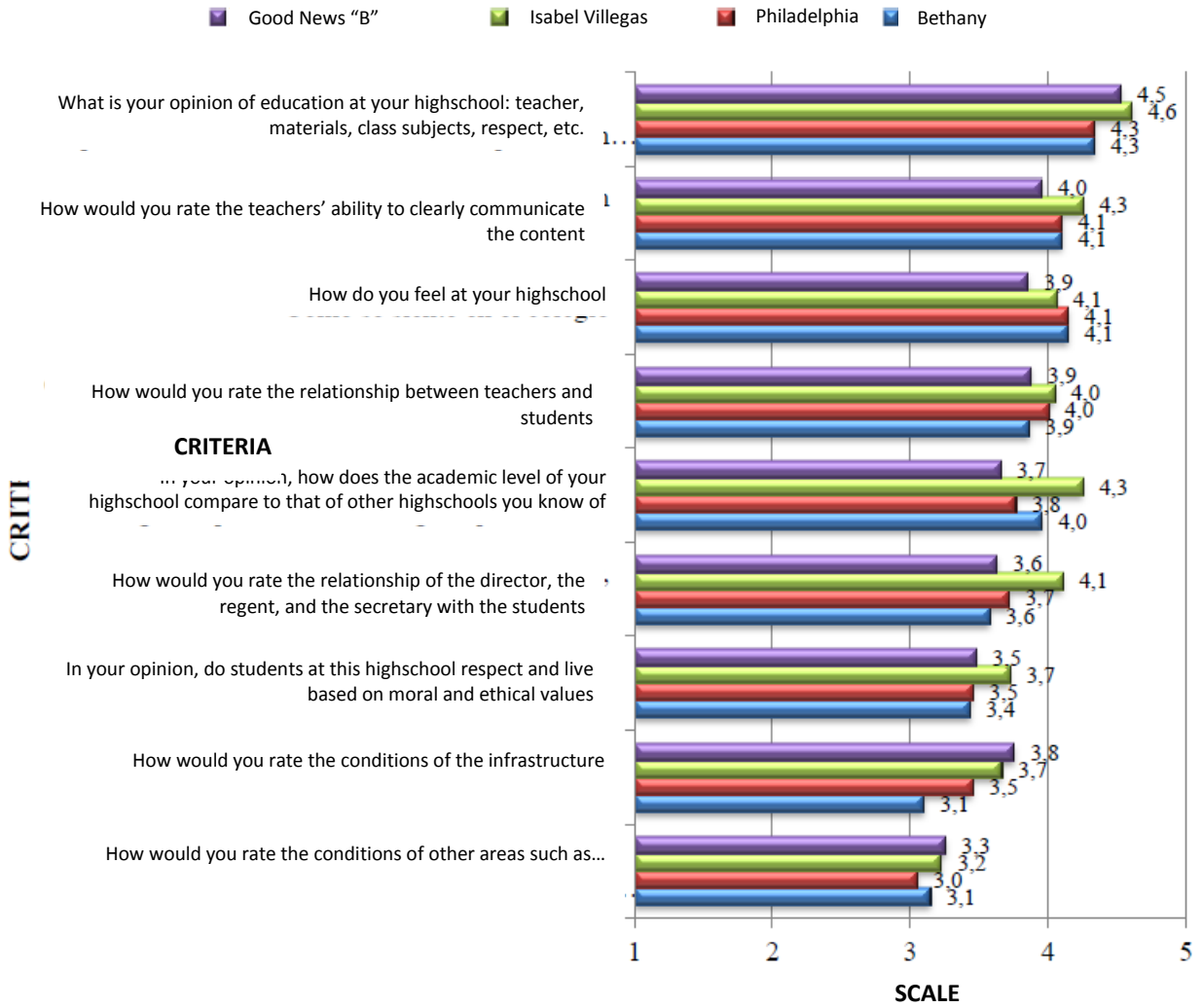
Graph N° 2

The following graph represents the final overall QMS analysis of PDI-Bol Administration:

Graph Nº 3

**QMS Analysis of PDI BOL Administrations
Summary of Findings**
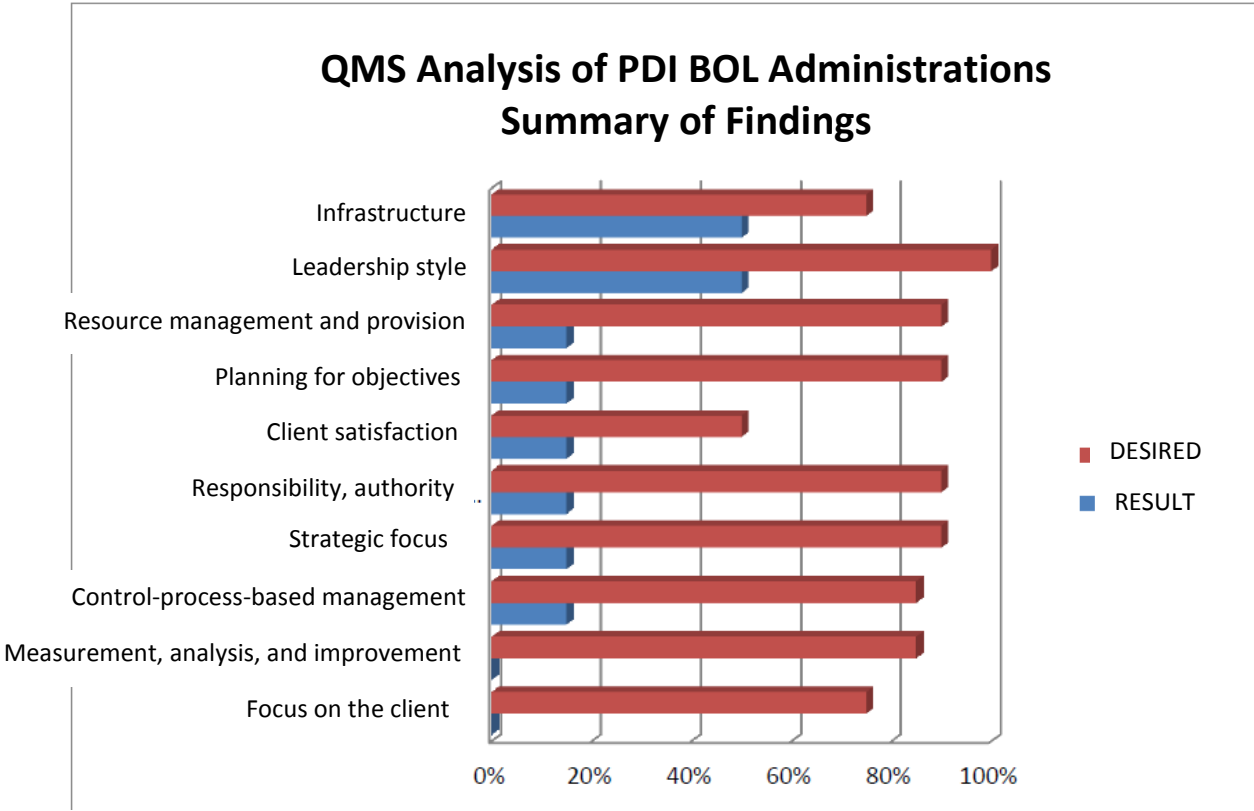
In terms of overall evaluation criteria, an organization working within the framework of EXTERNALLY FINANCED DEVELOPMENT PROJECTS should attain the levels of performance shown in red in the graph above. However, after evaluating all the components and categorizing the findings, [we found that] the organization demonstrates the performance results shown in blue—in all cases, they are below the standard. There is a considerable breach between the desired and actual results, and in areas such as measurement, analysis, and improvement, this breach is critical.

2.2 Results of the Evaluation of the Quality-Management System "QMS" in the Educational Units

The following Educational Units were evaluated:

Table N° 5

Statistics on the Educational Units evaluated				
Name	City	Grade Level	N° Students	N° Teachers
Good News "A"	Cochabamba	Pre-school	40	2
		Primary	569	16
Good News "B"	Santa Cruz	Secondary	479	23
Good News "C"	Santa Cruz	Pre-school	120	3
		Primary	435	12
Bethany	Riberalta	Primary	178	8
		Secondary	179	12
Isabel Villegas	Vallegrande	Secondary	280	16
Philadelphia	Rurrenabaque	Pre-school	41	3
		Primary	449	15
		Secondary	415	12

2.2.1   Strategic Focus
a. Mission, Vision, Values

MINOR NONCOMPLIANCE: While the five Educational Units have defined their mission and vision in the 2007-2011 PDI document, and while these are worded similarly to those established by PDI-Bol, none of the Educational Units has taken formal actions to ensure that the mission and vision are shared with / communicated to the Educational Community, much less taken action to measure their fulfillment.

CRITICAL NONCOMPLIANCE: While it's understood that the PDI-Bol project's strategy is oriented towards improving education across subjects by fomenting Christ-centered values and principles in students, the PDI strategies defined by each school lack actions oriented towards achieving this goal. The directors of the Educational Units that maintain an Evangelical identity recognize that, since they have some non-Christian teachers, only limited achievement of this goal is likely; the situation is even more critical in the case of the Educational Units

that identify themselves as non-Christian. This situation demonstrates strategic inconsistencies between PDI-Bol and the Educational Units.

POTENTIAL FOR IMPROVEMENT: We recommend developing a PDI Field Manual for use in the Educational Units. This document should contain all the requirements established by PDI BOL: strategic planning, operative planning, formation of management teams, organizing human resources, investment procedures, document control procedures, procedures for inventory and documentation of assets, etc. In this way, these tasks will not be left solely to the Educational Units' initiative.

b. **Planning and Monitoring Objectives**

CRITICAL NONCOMPLIANCE: Of the five Educational Units evaluated, it's evident that the majority do not have operational planning documents on file for each period from 2007 to 2011. In those cases where schools do possess these documents, the documents lack formal requirements such as signatures of the Management Team members who reviewed then, the PDI-BOL National Director's signature of approval, etc. For example:

- Bethany (Riberalta) lacks Annual Plans of Operation for 2007 through 2010.
- Philadelphia (Rurrenabaque) lacks an Annual Operations Plan for 2011; personnel who were interviewed said the plan was being developed.
- Good News "B"'s 2011 Annual Operations Plan lacks a budget.
- Good News "C" lacks an Annual Operations Plan for 2011.

CRITICAL NONCOMPLIANCE: There is no evidence that PDI BOL monitored the creation, approval, and follow-up of the Annual Plans of Action—as it should have. This situation also leads one to question how investments and disbursements from the funding agency are budgeted, and what relationship ought to exist between the budget and the investment folders.

c. Focus on Results / Client

CRITICAL NONCOMPLIANCE: No GRADUATE PROFILE, which should take into account the context and scope of each Educational Unit, has been formally established. None of the Educational Units that we evaluated have attempted to comprehensively measure the extent to which graduating students meet the desired profile.

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Furthermore, the graduates' performance has not been formally measured, nor have any other measurements been take to measure the extent to which the final result has been achieved in each beneficiary child and youth, or the extent of the impact the Educational Units working in cooperation with PDI Bol have had on them.

POTENTIAL FOR IMPROVEMENT: We recommend establishing comprehensive criteria to define the graduate profile, including factors in the following areas: cognitive, socio-emotional, spiritual. This profile should respond to the contextualized needs of each Educational Unit.

2.2.2 Focus on Processes and Structure of Documentation

POTENTIAL FOR IMPROVEMENT: We recommend defining more clearly the processes carried out within the Educational Units, the relationship between these processes, the persons responsible for them, and the relationship between the processes carried out in the Educational Units and those carried out by PDI Bol.

MINOR NONCOMPLIANCE: The Educational Units do not use nor have on hand the Allocation and Purchases Procedure document created by the FES Accounting department. The Educational Units lack a clear understanding of the scope of their responsibilities, for example, in regards to the investment folders. For example, no documentation has been filed for any of the following purchases for the Philadelphia Educational Unit: 2008 – purchase of computers; 2009 – purchase of textbooks; 2010 – purchase of a UPS (uninterrupted power supply) / current stabilizer; 2011 – purchase of audio equipment.

2.2.3 Focus on Resource Management
a. Financial Resources

CRITICAL NONCOMPLIANCE: Most Educational Units lack complete, ordered investment folders. None of the Educational Units we evaluated carry out inventories of their equipment. There are no procedures for retiring damaged or obsolete equipment. These situations hamper the schools' ability to impose internal controls on the storage and use of equipment. For example:

- The Educational Unit Good News "B" lacks investment folders for previous periods.
- The Educational Units Good News "C" lacks investment folders for previous periods.

MINOR NONCOMPLIANCE: Most of the Educational Units indicate that while their classrooms have been outfitted [with new technology], this equipment is not being used, because

the teachers do not know how to use them, nor have they included the use of these resources in their lesson plans.

2.2.4 Focus on Program Execution (Lesson Plans)

The findings in this category are discussed in depth in the sections analyzing teacher performance and curriculum.

2.2.2 Focus on Measurement, Analysis, and Improvement

CRITICAL NONCOMPLIANCE: None of the Educational Units that were evaluated have formally measured the extent of progress towards the goals they have stated, nor have they evaluated the extent to which cognitive, emotional, and spiritual results have been achieved among children, adolescents, and youths.

The following graph represents an overall final QMS analysis of the Educational Units working with PDI Bol:

Graph N° 4
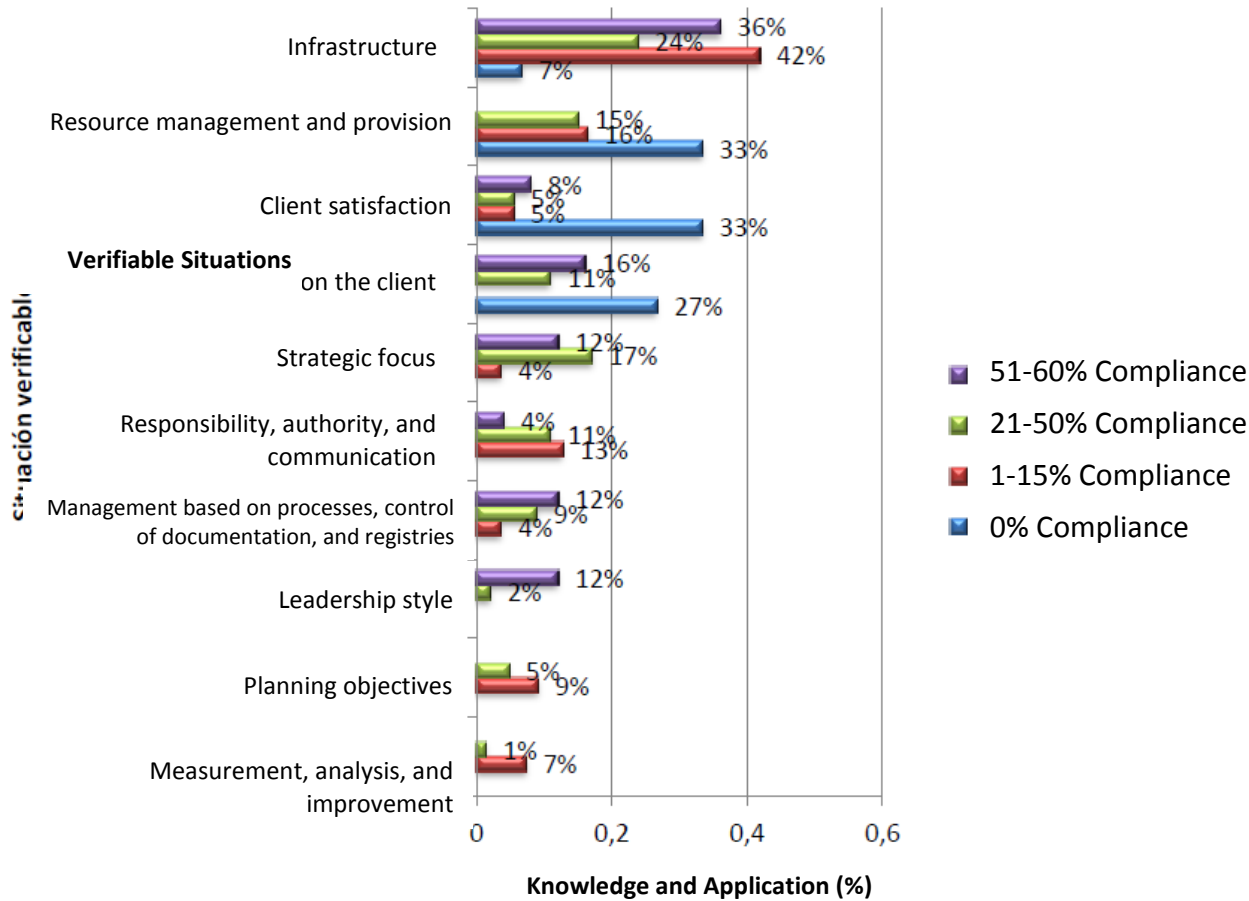
The above graph shows the percent compliance of the five Educational Units for each of the evaluated requirements and focus areas. For example:

- In regards to infrastructure and equipment—specifically, the conditions and use of the equipment—42% of the Educational Units are at a level of compliance between 1 and 20%, while 26% of the Educational Units attain a positive performance rating of between 51 and 60%.
- In regards to the clarity, definition, and communication of organizational hierarchy—organizational flowchart, employee duties manual, position profiles, etc.—13% of the schools score between 1 and 15% on the compliance rating, 11% scare 21 to 50%, and only 4% achieved a rating of 51 to 60%.

2.3 Results of the Strategic Pillars Evaluation

2.3.1 Pillar 1: Infrastructure and Equipment

a. Background

Within the framework of the five-year PDI BOL strategic project, one of the strategic pillars or intermediate objectives established is that of transforming classrooms into learning laboratories.

Both in terms of strategic lines of action and of investment, it's important to analyze the extent to which this pillar's established goals have been reached, and how this level of progress affects the project's central objective.

b. Evaluation methodology

The evaluation focused on two major spheres or fields of interest:

> **sphere: PEDAGOGY AND CURRICULUM**

> **sphere: QUALITY MANAGEMENT SYSTEM**

The methodology used to analyze this pillar includes:

> **FINDINGS: QMS evaluations of PDI BOL and of the Educational Units**

> **REPORTS on the field evaluations of the Educational Units**

Thus, the result presented will be formulated on the basis of analysis of these findings and reports, and categorized in the following manner:

"A"	Doesn't know how to do it, never has done it	0% compliance
"B"	Knows how to do it, but never has done it	1 – 20% compliance
"C"	Does it, but has not evaluated results in order to improve them	21 – 50% compliance
"D"	Does it, evaluated results, and can identify actions for improvement	51 – 60% compliance
"E"	Does, evaluates results, and improves systematically. In other words, there is trustworthy evidence demonstrating continuous improvement.	61 – 100% compliance

It's important to mention that we've carried out our analysis keeping in mind the expected cycle of execution for managing the resources of the classroom outfitting program:
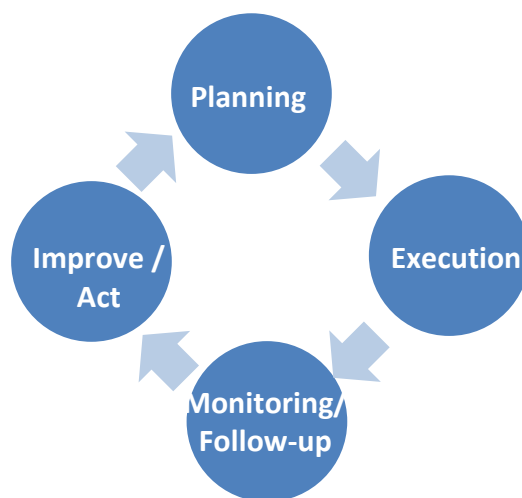
c. Results
The PDI BOL project has established the following indicators for the classroom outfitting effort:

No.	ASPECT	VARIABLE	INDICATOR
102	Innovation	Classroom is properly outfitted	Classroom is outfitted with learning corners.
104	Innovation	Classroom is properly outfitted	External infrastructure included

Evaluation element: Planning

The task of outfitting the Educational Units has been delegated to the schools' management teams, which analyze needs to determine, prioritize, and plan for the resources needed to outfit the classrooms.

However, there is an evident lack of definition of roles and responsibilities within the management teams in regards to carrying out this process. Most importantly, there is no standard procedure for the Educational Units to use in planning for their equipment needs. The following are the results of our evaluation in the area of planning for resource-management:

Table Nº 6

Managing and providing resources						
	Bethany	Good News "A"	Good News "B"	Good News "C"	Philadelphia	Isabel Villegas
FINDINGS RATING	C	C	B	B	B	C
ASSOCIATED PERCENT COMPLIANCE	*21-50%*	*21-50%*	*1-15%*	*1-15%*	*1-15%*	*21-50%*
B 1-15%		**knows how to do it, but doesn't do it**				
C 21-50%		**does it, but has not evaluated the results in order to improve them**				

Evaluation element: Execution

The QMS evaluation of the Educational Units demonstrates that most of the schools have outfitted and equipped their classrooms to a significant degree, but have not implemented learning corners or specialized classrooms. The following specific results were found during the on-site evaluations:

Managing and providing resources						
	Bethany	Good News "A"	Good News "B"	Good News "C"	Philadelphia	Isabel Villegas
FINDINGS RATING	C	C	C	C	C	C
ASSOCIATED PERCENT COMPLIANCE	*21-50%*	*21-50%*	*21-50%*	*21-50%*	*21-50%*	*21-50%*
C 21-50%		**does it, but has not evaluated the results in order to improve them**				

The above table shows that the Educational Units that we evaluated possess the planned-for equipment; however, the use of this equipment is lower [than desired] since in various cases the equipment is incomplete, broken, or out of order, and moreover, the teachers have not included the use of these resources in their lesson plans—probably because they do not know how to use the equipment.

Evaluation element: Monitoring

None of the Educational Units evaluated has established clear INTERNAL CONTROL procedures, nor has PDI BOL. Important findings regarding abnormal situations have been reported, and there is no evidence that clear actions have been taken [to correct said situations]. The following INTERNAL CONTROL procedures, at minimum, should be implemented:

- An approved procedure for Purchase Planning and Management. The management teams do not use and are not aware of the version produced by the accounting department; moreover, this version has not been formally approved.
- Procedures for CODING and carrying out ROUTINE INVENTORIES in the Educational Units.
- Procedures for documenting and controlling equipment use.

- Procedures for documenting and controlling equipment in need of repair and equipment that ought to be phased out.

Given the above situations, and based upon the findings we gathered, this element gets a grade of "B" for 1 – 15% compliance.

Evaluation element: Improving - Taking Action

Since no procedures have been defined for monitoring the outfitting of classrooms, neither have any procedures been defined for improving or taking action when the results of monitoring are reported.

Thus, the evaluation of the overall compliance with this pillar can be represented in the following manner:

Score: B – C
Doesn't do it – does it, but no monitoring

Planning

Score: A
Doesn't know how to do it and doesn't do it

Improve / Act

Execution

Score: C
does it, but no monitoring

Monitoring/ Follow-up

Score: B
Doesn't do it
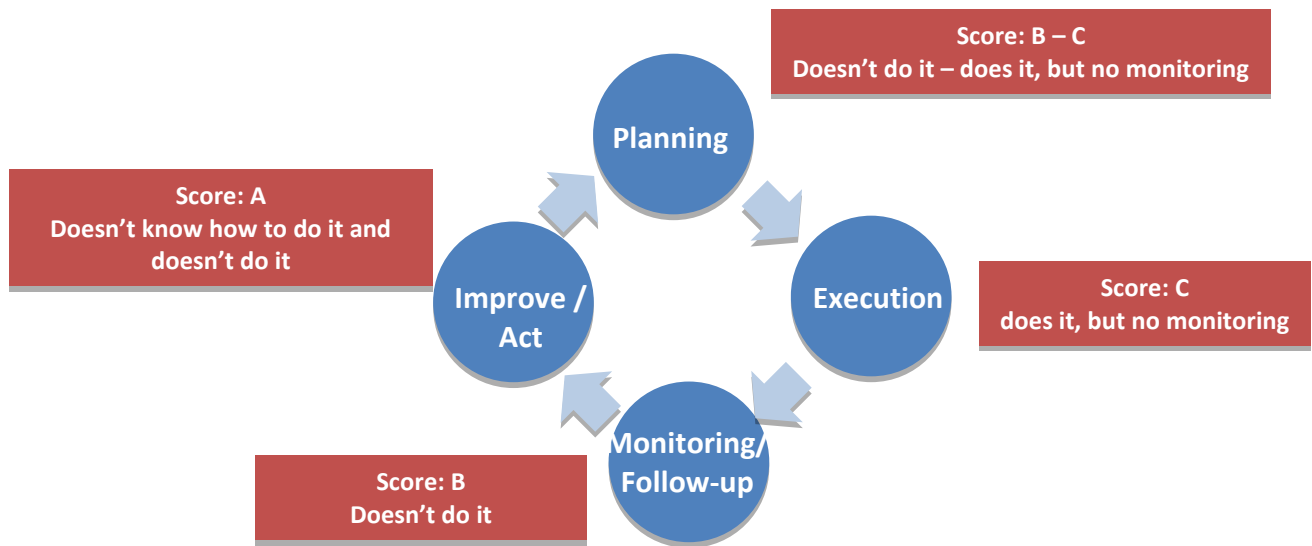
d. Conclusions

The indicator established for evaluating the intermediate objective of Outfitting / Equipping is unclear and contains subjective elements such as "appropriate environments." An objective should be conceptually measurable via objective indicators which can be measured to determine the extent to which the objective has been attained.

The results we analyzed demonstrated that while the Educational Units that we evaluated possess outfitted classrooms, much of the equipment is not being used for teaching and learning.

Neither the Educational Units nor PDI BOL possess clear Internal Control processes;, as a result, there is no clear evidence that the financial investment in this equipment has been preserved.

All projects should analyze, in a clear manner, the extent of the benefit produced by the investment. Clear intervention policies should be defined to deal with any situations that deviate from the plan.

2.3.2 Pillar 2: Participation of the Educational Community

a. Background

Within the framework of the PDI BOL five-year strategic project, the active participation of the Educational Community has been established as a strategic pillar.

As a line of strategy, the project's philosophy is rooted in the involvement of all members of the Educational Community—parents, students, and teachers—as agents of change.

b. Evaluation methodology

The evaluation focused on two major spheres or fields of interest:

> **sphere: PEDAGOGY AND CURRICULUM**

> **sphere: QUALITY MANAGEMENT SYSTEM**

The methodology used to analyze this pillar includes:

> **FINDINGS: QMS evaluations of PDI BOL and of the Educational Units**

> **REPORTS on the field evaluations of the Educational Units**

Thus, the result presented will be formulated on the basis of analysis of these findings and reports, and categorized in the following manner:

"A"	Doesn't know how to do it, never has done it	0% compliance
"B"	Knows how to do it, but never has done it	1 – 20% compliance
"C"	Does it, but has not evaluated results in order to improve them	21 – 50% compliance
"D"	Does it, evaluated results, and can identify actions for improvement	51 – 60% compliance
"E"	Does, evaluates results, and improves systematically. In other words, there is trustworthy evidence demonstrating continuous improvement.	61 – 100% compliance

c. Results

The indicators established by the PDI BOL project for this strategic pillar are sub-divided among the following variables.

In accordance with the results of the QMS evaluations carried out at the Educational Units, each variable has been rated, and its frequency has been identified.

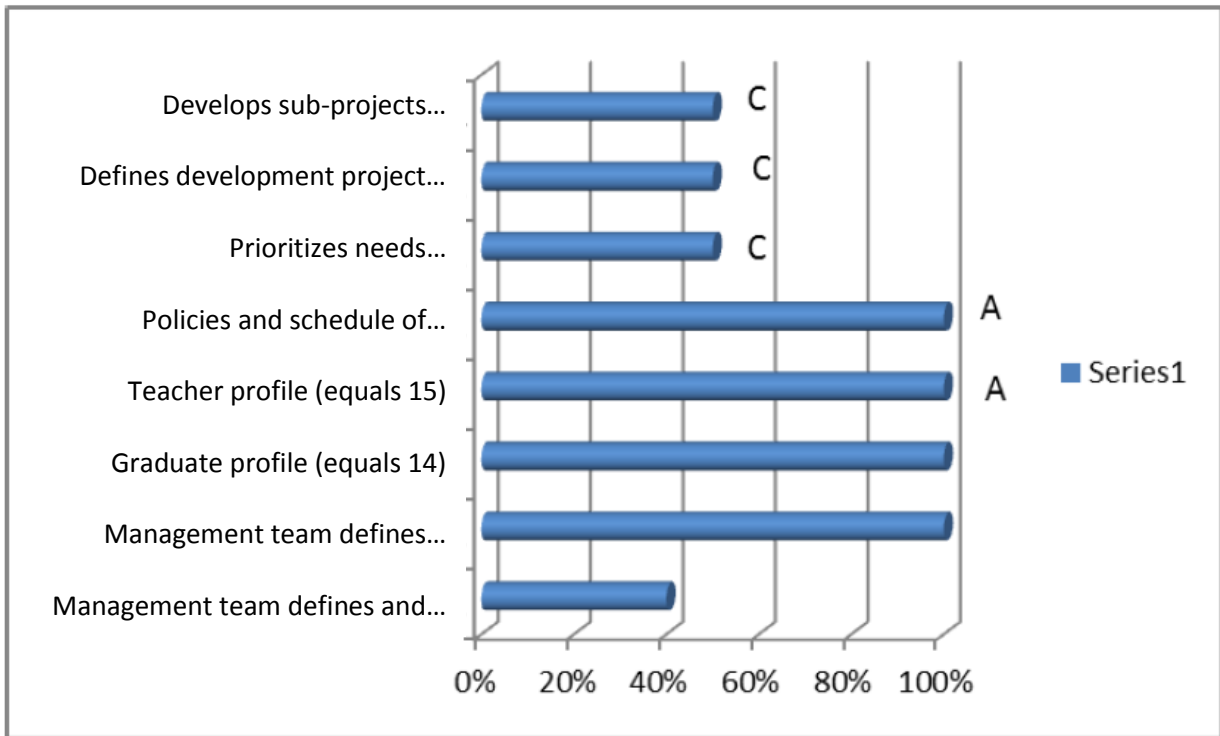## 3.1 Activities related to defining the management team, and this team's participation

As can be seen in the following table and graph, there are several important factors that should be commented upon:

- Only 40% of the Educational Units have internal regulations related to the PDI, and among those 40%, the documents lack clear information regarding roles and responsibilities within the [management] teams, resulting in serious distortions of responsibility and authority.
- All the Educational Units have used the same graduate profile as that stated by PDI BOL, which suggested that their definitions have not been adjusted to the context and reality of each particular Educational Unit. For example, schools that only provide primary education are using the same graduate profile as secondary schools.
- The mission and vision of the Educational Units' PDIs are almost exactly the same as those written out in the PDI BOL document; these missions and visions have not been formally communicated [to the community], and there is no documentation of such activities.
- No formal program of training for the management teams has been established. Those trainings that have been carried out have been due to chance invitations or sporadic activities.

Table N° 8

VARIABLE	INDICATOR	RATING	% FREQUENCY
Activities related to defining the management team and to the team's participation	The management team defines and puts into action an internal regulation that is congruent with the project (equal 26)	B	40%
	Management team defines the Educational Unit's Vision and Mission	B	100%
	Graduate profile (equal 14)	B	100%
	Teacher profile (equal 15)	A	100%
	Training policies and schedule	A	100%
	Needs are prioritized and organized in an Annual Plan of Action that is congruent with the PDI	C	50%
	Five-year PDI institutional development project is defined in accordance with the Mission and Vision	C	50%
	Sub-projects are developed for teacher training, family enrichment and well-being, and pedagogical innovation	C	50%

Graph Nº 5

Bar chart (Series1) with the following categories (top to bottom) against a 0%–100% scale:
- Develops sub-projects… — C (≈50%)
- Defines development project… — C (≈50%)
- Prioritizes needs… — C (≈50%)
- Policies and schedule of… — A (100%)
- Teacher profile (equals 15) — A (100%)
- Graduate profile (equals 14) — (100%)
- Management team defines… — (100%)
- Management team defines and… — (≈40%)

1. <u>Evaluation</u>

This field is one of the least-developed, since none of the Educational Units has defined, nor uses, techniques to evaluate and measure the indicators established, nor do they monitor the implementation of infrastructure-maintenance plans, since no such plans exist.

There is a generalized failure to monitor both the execution of the Annual Plan of Action and financial-pedagogical activities, since said activities are not recorded in a way that would make such monitoring possible.

Table Nº 9

VARIABLE	INDICATOR	RATING	% FREQUENCY
Evaluation	Possesses suggested techniques for evaluation	A	100%
	Controls execution of Annual Plan of Action	B	30%
	Monitors implementation of infrastructure maintenance plan	A	100%
	Accompanies processes of administrative, financial, and pedagogical management	B	100%

2. Organization

All the Educational Units have organized their management teams. Nevertheless, we repeat that these teams' level of functioning should be improved by clearly defining roles and responsibilities.

Table N° 10

VARIABLE	INDICATOR	RATING	% FREQUENCY
Organization	Each grade has 1 parent delegate	C	100%
	Parents have organized a school board	C	100%
	Teachers are organized	C	100%
	A management team exists	C	100%
	Student center	C	100%

3. Budget

While the management teams have put together both plans of operation and budgets for each Educational Unit's Institutional Development Plan (PDI), there are deficiencies in the monitoring and reporting of these processes, and concrete actions to improve the situation are lacking. Due to the lack of procedures, documentation, and training for the management teams, the impact of this project component is reduced.

VARIABLE	INDICATOR	RATING	% FREQUENCY
Budget	Five-year budget is put together in a participative manner	B	100%
	Annual operational budget is put together	C	100%
	Strategies are sought for financing sub-projects established in the PDI.	B	30%
	Budget compliance is evaluated and reported on quarterly	B	30%
	Budget execution is monitored	B	30%

d. Conclusions

While the management teams have been formed at each of the Educational Units, they are not functioning in a homogenous manner in regards to how their roles, scope, and responsibilities are defined.

In some Educational Units the role of this body has been distorted, with the management teams assuming even greater authority than the school directors.

In general, the parents and the management teams need to have their structure and procedures better defined if they are to play in important role in planning, execution, monitoring, and improvement within the Educational Units.

2.3.3. Strategic Pillar3: Teacher Professional Development Program

The professional development program aims to empower teachers to develop a culture of quality in education by Christian principles and values. Teachers are trained through the Bolivian Evangelical University in certificate and bachelor's degree programs.

A sample group of 38 teachers was evaluated, divided into two groups: 19 TPDP program participants and 19 teachers who did not participate in the program, in order to compare the similarities and differences in performance of each group and thus demonstrate the contribution made by IDP-BOL's teacher training program.

Indicators are in accordance with instructions in the document provided by IDP-BOL as proposal from the Department of Curriculum Development and IDP-BOL Processes in 2010, entitled "Towards a Culture of Quality in Education by Christian Principles and Values." The document mentions a system of monitoring and evaluation by indicators based on a scale of quality in educational (see Appendix 2).

To evaluate teacher conduct and teaching skills, three instruments were used: **Teacher questionnaires** with seven sections that allowed us to verify the implementation of quality education practices and **classroom observation** with three macro variables related to teacher performance in the classroom, and, finally, a **test of knowledge** was administered to determine the average academic performance of the students of evaluated teachers.

Instruments assessed 8 variables broken down into 21 indicators that were scored on a quality scale of 1 to 5. The intent of this type of scoring was to allow the quality assessment to offer a detailed understanding of the degree of compliance with standards. The scale is described below:

1. Significant need for development (0% attainment of the indicator): This indicates that few or none of the State standards/ norms is met in the teaching-learning process.

2. Need for development (25% attainment of the indicator): This indicates that some State standards/ norms are met while others are not.

3. Competent (50% attainment of the indicator): This indicates that teachers are meeting State standards in the PEA.

4. Strength (75% attainment of the indicator): This indicates that teachers exceed standards/ norms, taking initiative to innovate or improve quality in education and teaching.

5. Significant strength (100% attainment of the indicator): This indicates that the teacher is greatly exceeding standards/ norms and demonstrating a very high standard of curriculum planning and innovation. A "significant strength" is often a best practice that could be celebrated and promoted with others.

As we can see, this quality scale allowed us to carry out not only a quantitative evaluation but also a qualitative one. In the evaluation of this pillar, it was expected that the teachers at least satisfy the "competent" variable, i.e. meet the State's standards. The others are deficient or exceed expectations for quality, especially in regard to the implementation of curricular innovations based on Christian principles and values proposed in IDP-BOL to achieve the higher goal of quality in education.
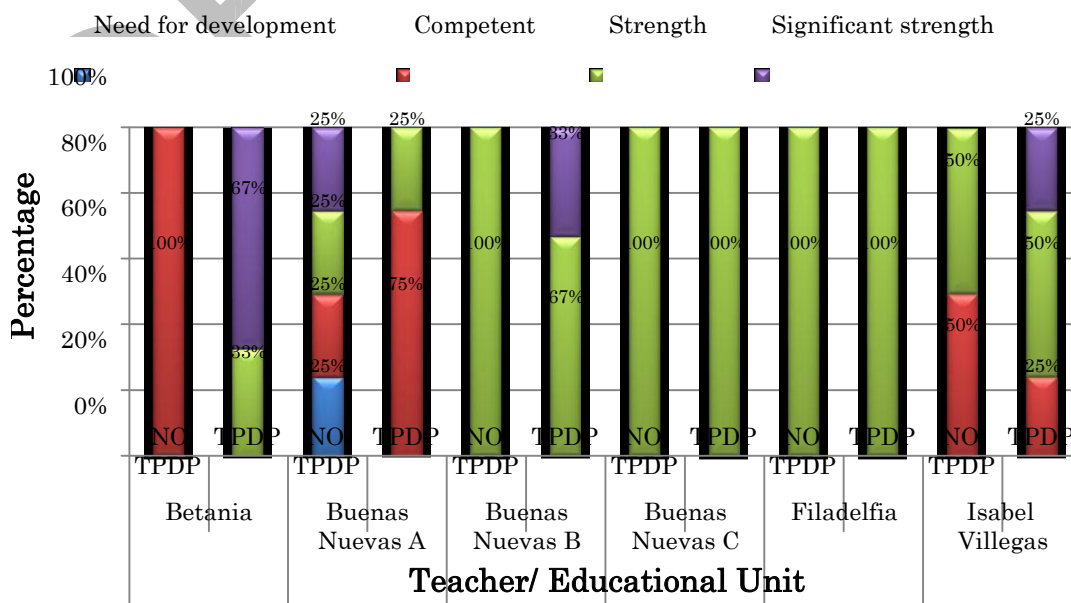
The 2 variables, their 9 analyzed indicators and results were as follows:

2.3.3.1 Variable 1. Teacher Conduct

This variable includes the following indicators:

a. **Participates in various training activities to stay current and grow professionally**

Chart No. 6

This indicator examined the tendency of teachers to participate in refresher courses. Here, we see that the highest scores in EUs Betania, Buenas Nuevas A and B and Isabel Villegas correspond to teachers who participated or continue to participate in the TPDP program, since they are aware of the need to stay current to meet educational demands.

In Educational Units Filadelfia and Buenas Nuevas C, there is parity in the tendency to develop the expertise, whether through the TPDP program or other teacher training activities, including self-learning.

b. Seeks help to face, resolve and overcome personal, family and other problems

This indicator explores teachers' tendencies in dealing with problematic situations that could affect their job performance and whether they assume an attitude that leads them to consult with others who can assist them. This tells us whether a person is able to recognize his or her weaknesses and seek help if necessary.

Chart No. 7
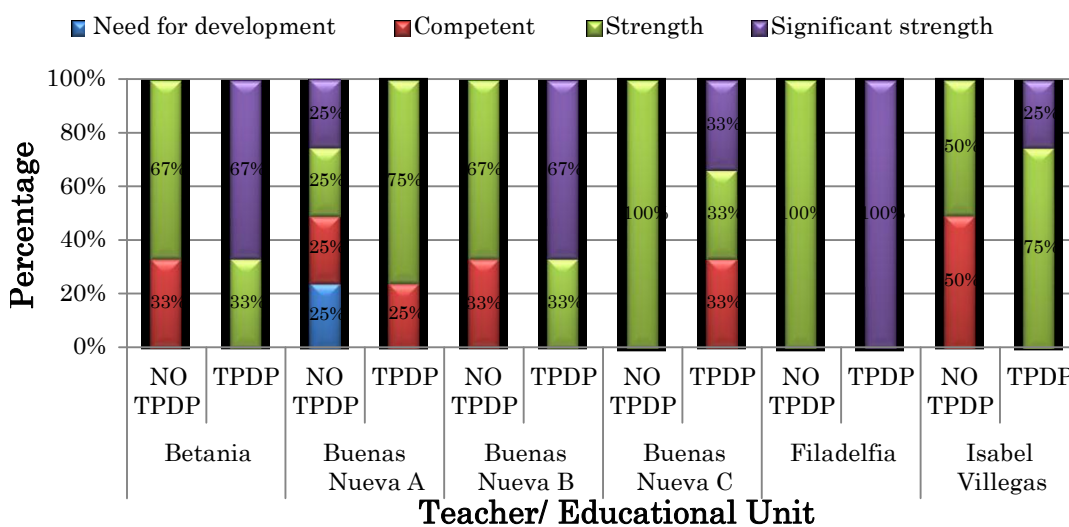
Results show a general trend in both groups of teachers to resort to external means to solve problems, although the highest scores come from teachers at EU Filadelfia (Rurrenabaque), exceeding the scores of other evaluated groups.

c. Constructively subjects to authority

The concept of subjection has Biblical origins, since this principle means the disposition in a person to obey his or her authorities and thus show respect for the hierarchy and senior positions. In the case Educational Units, we are referring to the principal.

47

Chart No. 8

Legend: ▪ Competent ▪ Strength ▪ Significant strength

Y-axis: Percentage — 0%, 20%, 40%, 60%, 80%, 100%

X-axis: Teacher/ Educational Unit — NO TPDP / TPDP for: Betania, Buenas Nueva A, Buenas Nueva B, Buenas Nueva C, Filadelfia, Isabel Villegas
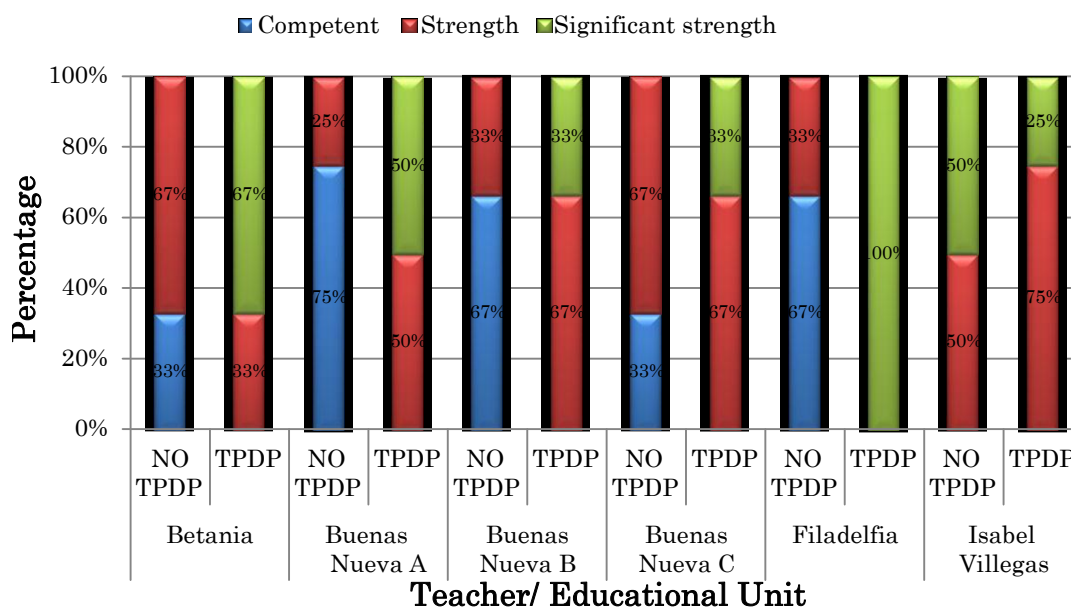
The scores indicate a greater tendency among teachers participating in the TPDP program to submit. Therefore, we assume that they value the Christian principle of submission to authority.

However, although to a lesser extent, this willingness has also been observed in teachers not participating in the program, since they have expressed that they feel respect for school authority in most cases. Again, the EU Filadelfia's trained teachers score higher in this area.

2.3.3.2.   Variable 2. Teaching Skills

This variable includes the following indicators: The teacher…

a. Is familiar with the content of his/ her teaching
b. Can prepare annual and quarterly plans by teaching unit
c. Is familiar with students' cognitive, behavioral, affective, social and spiritual stages of development
d. Adapts his/ her language and teaching activities to the students' stage of development
e. Has clear convictions about learning and its process
f. Transmits Christian principles and values in his/ her teaching

After a comprehensive analysis of the above indicators, it was felt that teachers' teaching skills, knowledge of curriculum areas and classroom application should be evaluated through the teaching skills of teachers in the six Educational Units. The following results were obtained:

Chart No. 9
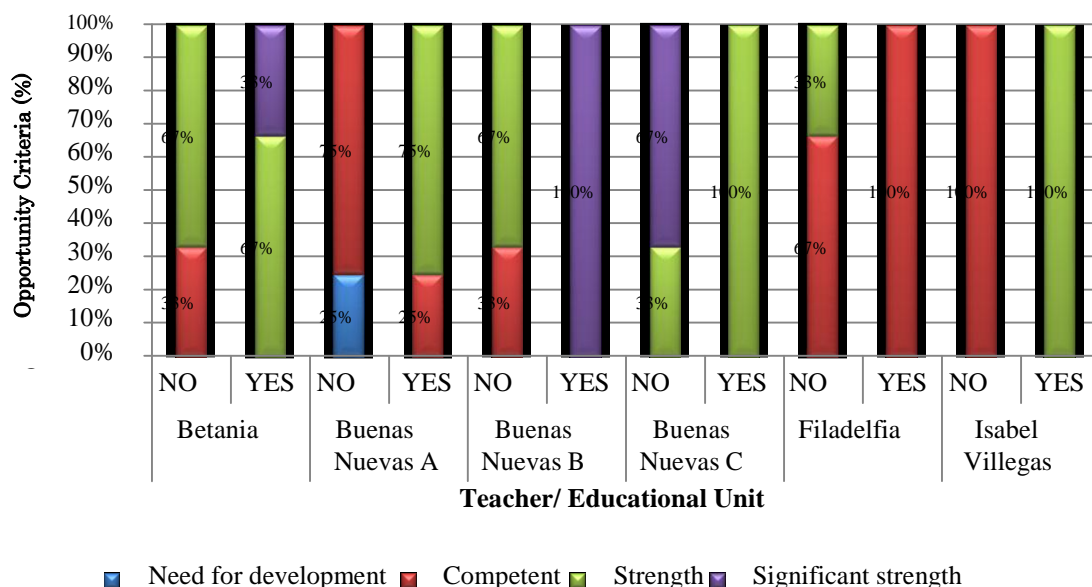
Figure 5. Professional teaching skills in the different Educational Units

It is noted that both trained and untrained teachers in the six Educational Units show significant strengths and strengths in the knowledge of the content of teaching topics, annual and/ or quarterly academic planning and organizing, knowledge of the stages of cognitive development and the ability to adapt the teaching language to students' stages of development. Teachers also demonstrate a clear conviction about learning and it process, in some cases transmitting Christian principles and values (TPDP teachers). However, this last finding cannot be generalized, since the evaluation of teachers' quarterly/ fortnightly planning found that these principles are not mainstreamed. It therefore follows that Christian principles and values are not formally taken into account in six evaluated Units' educational practice.

2.3.3.3.   Other Variables Considered

To complement the information provided by the above variables, it was proposed that the evaluation reach down to the level of students' academic achievement in order to have a logical picture of the teaching-learning process, and, especially, to compare the two target groups of teachers (TPDP trained and untrained). With this understanding, the following results were obtained by Educational Unit:

a. Academic achievement of the student population

A sample of 834 primary and secondary school students was obtained, and results range between 0 and 70 points, which are set by the Ministry of Education at the national level. The percentages of academic achievement of the evaluated Units are as follows:

- Evaluated EUs had a population of 834 students, 50.1% (418) primary and 49.9% (416) secondary. Those with excellent achievement (61 to 70 points) are 27.5%, those with very good achievement (50 to 60 points) are 27.5%, those with satisfactory performance (36 to 49 points) are 19.2%, and those in need of support (less than 36 points) are many at 25.8%. These results were averaged from the six Educational Units, as shown in the following chart.

Chart No. 10
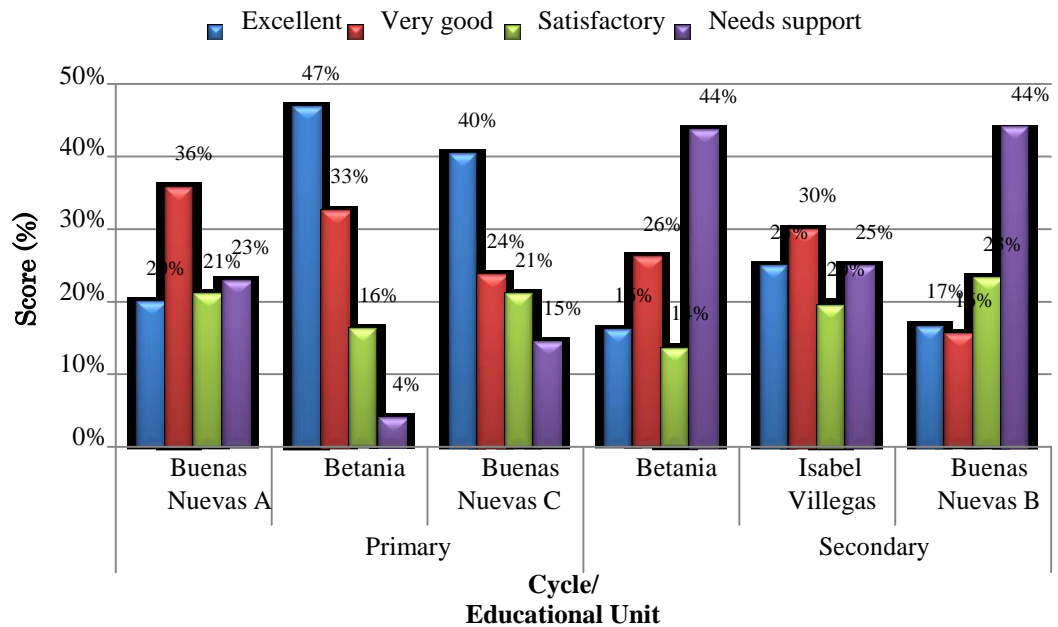
b. Comparative analysis of academic performance vs. teacher preparation

To get a logical, linear picture of the teaching-learning process, the results of students' academic performance were compared with

their teachers. This was achieved by applying a test of knowledge at the end of each class observed (designed and applied by each teacher). From these results and the charts that follow, a comparison is made between products (academic performance) presented by teachers trained in the TPDP program and those presented by teachers who did not receive TPDP training.

Chart 11. Students' vs. Teachers' Performance (TPDP Program Participants)
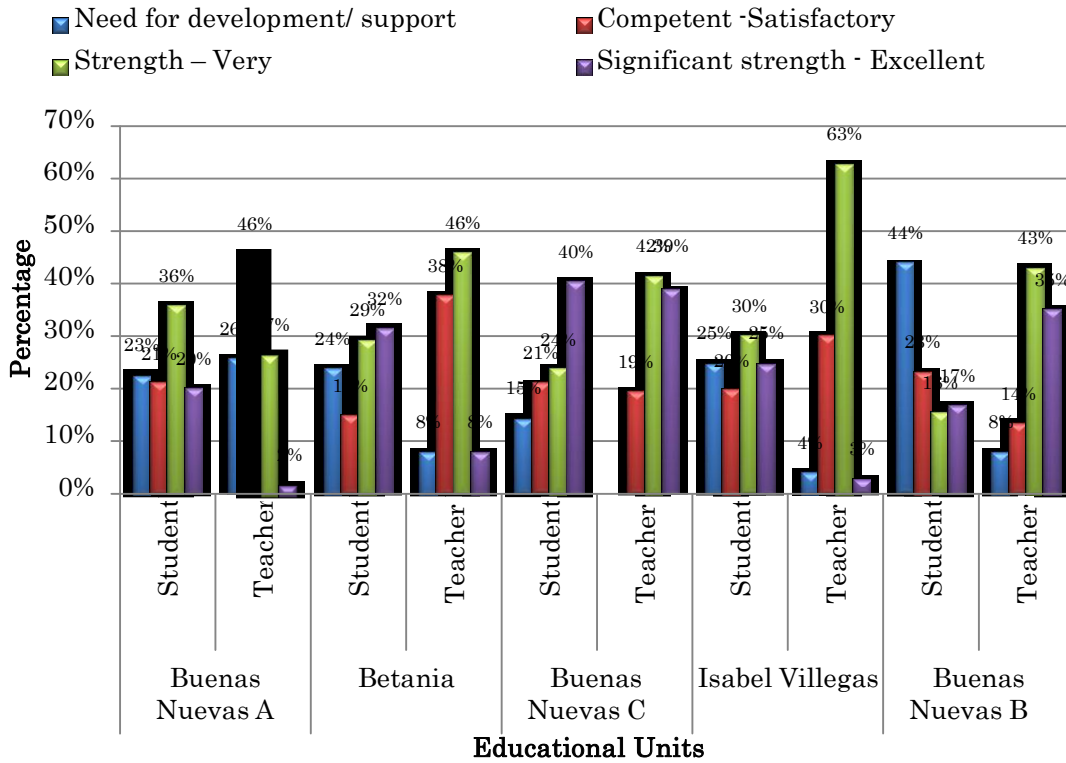
The above chart shows the following information:

The highest percentage of teaching skill reached by teachers trained in the TPDP program is an average of 54%, which means a level scored as "competent." This generally means that teachers meet State standards for planning, teacher behavior and teaching skill in the classroom.

In turn, student performance is satisfactory, averaging 48 points (on a scale of 70), which means "satisfactory" performance. For this section, assessment parameters were unique to each Education and Unit and teacher, i.e. tests of knowledge exclusively on what each had learned in class.

From both sets of results, we conclude that teachers trained in the TPDP program achieved good results in student learning. Now, one of the main indicators expected to be found in teaching was the transmission of "Christian principles and values," and, although there was intentional application in some cases (32%), it cannot be generalized, since this element was not included in any of the teachers' subject-matter planning materials.

Chart No. 12. Students' vs. Teachers' Performance (Not TPDP program beneficiaries)
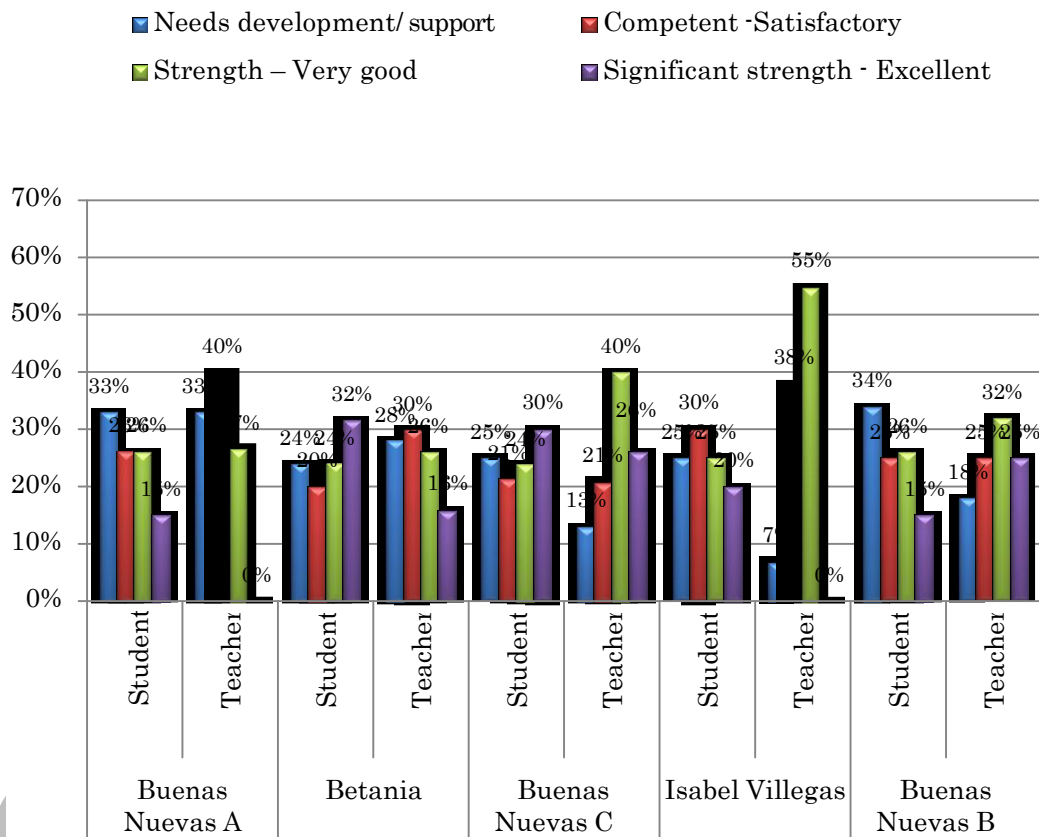
In regard to the group of teachers that did not participate in the Teacher Professional Development Program, the highest percentage of teaching skill reaches an average of 43%, which means "need for development." This means, generally, that the teachers do not fully meet State standards, carrying out only some aspects such as annual and half-yearly planning and teaching evaluations at the end of each quarter. However, generally, there is no evidence of curricular innovation practices, let alone Christian principles and values.

In turn, their students' performance has averaged 45 points (on a scale of 70), which is "satisfactory."

For this section, assessment parameters were unique to each Education and Unit and teacher, i.e. tests of knowledge exclusively on what each had learned in class.

It follows that these teachers, compared to TPDP program beneficiaries, present similar achievement in regard to levels of student learning, with a slightly different percentages. Nevertheless, both fall in the same scoring category for effectiveness in learning (satisfactory performance).

2.3.3.4. Effectiveness of the Teacher Professional Development Program

In order to analyze the determinants for implementing quality education practices, it is necessary to relate the above results to the academic achievements of the Teacher Professional Development Program (TPDP), since according to the proposal, teachers should have been trained in mainstreaming Christian principles and values, classroom management and society and culture. (Five-Year IDP Document, p. 12)

Taking this into consideration, to evaluate the extent to which the milestone has been reached, *training teaching staff*, we used the database provided by support staff in the Evangelical University, which includes participants' grades and reflects 33% attainment.

Nonetheless, having reviewed these records and contrasted these results with the calculation made from the lists of students' academic records detailed in the table below, the value of the attainment of targets is reduced to less than 6%. (See Table No. 11.)

It must be pointed out that IDP's academic follow-up information is inadequate and inconsistent due to errors generated by calculating the attainment of associated targets on the basis of informal UEB documents.

For this reason, different institutions calculate different percentages of students who should have completed their studies. Therefore, the data described below are an estimate, given the Bolivian Evangelical University's lack of cooperation in providing official documents.

Table No. 11

No.	Groups	No. of students by group	IDP- BOL/UEB Contracts		In process def. Thesis		Approved def. Thesis	
			Nº	%	Nº	%	Nº	%
0	Buenas Nuevas A, B, C and D	78	0	0	6	7.7	5	6.4
1	Barrio Unión	37	17	46	2	5.4	1	2.7
2	Nal. Cotoca	39	14	36	2	5.1	2	5.1
3	Vallegrande	43	0	0	12	27.9	13	30.2
4	Villamontes	41	0	0	1	2.4	3	7.3
5	Riberalta	40	0	0	2	5.0	1	2.5
6	Rurrenabaque	43	0	0	3	7.0	0	0.0
7	Does not exist							
8	Normal 1	17	17	100	0	0.0	0	0.0
9	San Rafael de Velasco	45	40	89	0	0.0	0	0.0
10	Normal 2	34	23	68	0	0.0	0	0.0
11	Does not exist							
12	Vallegrande	49	35	71	0	0.0	0	0.0
	TOTALS	**466**	**146**	**31**	**28**	**6**	**25**	**5.4**

Table caption (in-table title): Table with Percentages Reflecting the Academic Status of Teacher Participants in the TPDP Program (According to notes provided by UEB)

There is no real unit cost, because it would be based on a study of costs per center.

2.3.3.5. Conclusions

Analyzing the factors involved in obtaining education product (students' academic achievement), we face various issues.

It was often observed that tasks of identifying, preparing, evaluating, monitoring and managing the IDP-BOL project and is TPDP program have been prepared without a strategic planning framework that

would order, lead and guide actions toward meeting goals. Since strategic objectives between both institutions and the means of verification of achievements are not clear or explicit, resource allocation was determined capriciously and headed in different directions (several topics of training) that were not always in tune with the institution's strategic priorities (vision/ mission).

The Bolivian Evangelical University has not provided *formal* documentation to substantiate the extent to which objectives have been met in target teaching group. It is known by inference from documents provided informally (database and students' notes) that the program's level of success in terms of teachers having completed their TPDP program studies to date is 6%, which falls short of goals set at the beginning of the program.

2.3.4. Pillar 4. Curricular Adjustments for Educational Innovation

The assessed PDI-BOL proposed curriculum has special characteristics that we should mention when analyzing findings from the field evaluation. The bases for curriculum design and its philosophy will help us interpret the data and our conclusions.

There are two main documents that form part of the analysis: "Proposed Curriculum: Toward a quality education through Christian principles and values" by Sergio Saavedra Belmonte and the "Manual of Curriculum Adjustments" by the PDI-BOL team.

To evaluate the proposed curriculum in the field, two types of instruments were used: *review of documentation* with 12 variables that allowed us to verify the proposal's implementation and *classroom observation* in three macro variables subdivided into 15 observable indicators.

To analyze and interpret results in this dimension, results from the other instruments and variables were also taken; thus we present a complete analysis with an intersection of variables that will allow us to be as objective as possible.

The instruments were designed on the basis of 15 variables that were scored with 5 quality sub-variables. With these sub-variables, we intend to allow the assessment of quality to go beyond answering simple "yes-no" questions. These are

1. Significant need for development: This indicates that few or none of the standards/ norms of the proposed curriculum have been met.

2. Need for development: This indicates that some of the standards/ norms applicable to the proposed curriculum have not been met or have only partially been met.

3. Competent: This indicates that the Educational Unit is substantially meeting the standards/ norms applicable to the proposed curriculum.

4. Strength: This indicates that the Educational Unit exceeds the standards/ norms, taking initiative to innovate or improve effectiveness.

5. Significant strength: This indicates that the Educational Unit is greatly exceeding standards/ norms and reflecting a rather high standard for curriculum and/ or innovation. A "significant strength" is often a best practice that could be celebrated and promoted among others.

As we can see, this quality scale allowed us to carry out not only a quantitative evaluation but also a qualitative one. In this case, it was expected that the Educational Units satisfy the "competent" variable, ie. meet the State's minimum standards. The others are deficient or exceed expectations for quality, especially in relation to the implementation of curricular innovations proposed in PDI-BOL to achieve quality in education.

The 12 variables analyzed and their results were as follows:

1. The EU has a philosophical manifesto by relational principles, and these are understandable.

The philosophical manifesto was seen as the main document containing the curriculum's conceptual bases with a Biblical focus. The five relationship principles are also found there; these were mentioned in the documents provided.

The evaluation was designed to determine whether these documents were "understandable" in terms not only of wording and coherence but also contextualization and implementation in the observed Educational Units.

Results under this first variable are as follows:

Sixty-seven percent (67%) of the six Educational Units evaluated either had no philosophical manifesto or a confusing one. In some cases, the manifesto has not been contextualized according to the Educational Units' needs, ie. they are "copies" of the main document, which mentions only main concepts.

The other 33% has a manifesto and is in the same situation, ie. in some cases, it is a copy of the document shared by the PDI team. The qualitative scores assigned to each Unit under this variable were

Table #12

Criteria	Good News A	Philadelphia	Bethany	Isabel Villegas	Good News B	Good News C

The EU has a philosophical manifesto by relationship principles, and they are understandable	It is understandable and has relationship principles	It is understandable and has relationship principles	The manifesto is confusing and difficult to understand	The manifesto is confusing and difficult to understand	It has no philosophical manifesto	The manifesto is confusing and difficult to understand
Score	Competent	Competent	Need for development	Need for development	Significant need for development	Need for development

2. The EU has a coherent vision and mission.

Although these elements affect the management dimension, we should clarify that they should have been elaborated as mutually coherent.

We can see that 90% of Educational Units has a coherent mission and vision and so was scored as competent and strong. However, it was observed that although these Educational Units have written out their vision and mission, these elements do not govern daily practice.

Ten percent (10%), ie. one Educational Unit, "Good News B," has no vision or mission. These results show us that we still need to delve deeper into key aspects of educational management.

Table #13

Criteria	Bethany	Good News C	Philadelphia	Good News A	Isabel Villegas	Good News B
The EU has a coherent vision and mission	It has a mission and vision, they are coherent, the wording is clear and easy to remember	It has a mission and vision, they are coherent, the wording is clear and easy to remember	It has a mission and vision; the wording is coherent	It has a mission and vision; the wording is coherent	It has a mission and vision; the wording is coherent	It does not have a mission or vision
Score	Strength	Strength	Competent	Competent	Competent	Significant need for development

3. There is consistency between the philosophical manifesto and vision and mission.
This variable allowed us to verify and delve into how applicable the philosophical manifesto is to issues such as vision and mission.

The results were that 50% of Educational Units is not consistent, ie. has not practically applied the philosophy to the vision or mission, which guide education management.

The other 50% is competent. We can add that it is necessary to recognize that the observed Units add Christian principles and values.

Table #14

Criteria	Good News A	Isabel Villegas	Philadelphia	Bethany	Good News B	Good News C
There is coherence between the philosophical manifesto and vision and mission	They are entirely coherent	They are entirely coherent	They are entirely coherent	Some aspects	Some aspects	There is no coherence
Score	Competent	Competent	Competent	Need for development	Need for development	Significant need for development

4. Proposed curriculum by area and cycle with all subjects defined

The proposed curriculum is the basic document of the Education Unit proposal, containing the general parameters for curricular organization.

The areas proposed by the PDI are leadership and discipleship, Bible, missions and technology for application; there are 7 areas in primary school and 14 secondary schools. Results by Educational Unit were as follows:

Table #15

Criteria	Good News A	Good News C	Philadelphia	Bethany	Isabel Villegas	Good News B
Proposed curriculum by area and cycle with all subjects defined	Proposed curriculum with all areas, cycles and subjects defined	Proposed curriculum with all areas, cycles and subjects defined	The proposal has few areas, cycles and subjects defined	Proposed curriculum with all areas, cycles and subjects defined	The proposal has few areas, cycles and subjects defined	The proposal has few areas, cycles and subjects defined
Score	Competent	Competent	Need for development	Need for development	Need for development	Need for development

As can be seen, 67% shows need for development, ie. the proposed curriculum did not reach down to the Educational Units, which are dominated by subjects and areas required by the government at the national level; the other 33% of Educational Units presents the areas mentioned.

5. Curricular structure consistent with the graduate profile

The curricular structure is the proposal's characteristic scheme, based on three issues:
a) What one seeks to develop in the student
b) How to organize academic processes to achieve it
c) How to verify whether these are working properly

The graduate profile is a description of the product of 12 years and/ or intermediate stages of study and training in the Educational Unit. It summarizes the characteristics that one wants to see in students in school, so it is a guide for teachers, parents and students. This guide takes shape day by day in the classroom. It is a filter for content, methods and activities proposed by teachers. It is also a criterion for assessing quality in education.

The results of the evaluation of curricular structure in the six Educational Units were as follows:

Sixty-seven percent (67%) of Educational Units does not have a curricular structure consistent with the profile, as we saw under the previous variable. If 50% does not have the areas of the proposed curriculum, missions, discipleship, leadership and Bible, we can deduce that the proposal was not implemented. Only 33% has implemented the curriculum and profile coherently.

Table # 16

Criteria	Good News B	Philadelphia	Good News A	Bethany	Isabel Villegas	Good News C
Curricular structure consistent with the graduate profile	The curricular structure and graduate profile are consistent	The curricular structure and graduate profile are consistent	The curricular structure has few elements of the graduate profile	The curricular structure has few elements of the graduate profile	The curricular structure has few elements of the graduate profile	The curricular structure has few elements of the graduate profile
Score	Competent	Competent	Need for development	Need for development	Need for development	Need for development

6. Areas of educational development consistent with the graduate profile

Results under this variable were as follows:

Fifty percent (50%) of Educational Units has educational development areas inconsistent with its educational development profile.

The other 50% meets the established standard in regard to educational development and profiles.

We should clarify that all educational centers, whether having or lacking consistency between areas and profiles, emphasize academic areas and the profile endorsed by the government at the national level. In addition, the six Educational Units have not planned their areas of educational development, taking into account the PDI curricular program's graduate profile.

Table #17

Criteria	Isabel Villegas	Good News B	Philadelphia	Good News A	Bethany	Good News C
Areas of educational development (AED) with the graduate profile	The AEDs are entirely consistent with the profile	The AEDs are entirely consistent with the profile	The AEDs are entirely consistent with the profile	Few aspects of the AEDs are consistent with the profile	Few aspects of the AEDs are consistent with the profile	Few aspects of the AEDs are consistent with the profile
Score	Competent	Competent	Competent	Need for development	Need for development	Need for development

7. The EU has a graduate profile consistent with the vision and mission.

Here we see an interesting fact, namely that 67% of the Educational Units qualifies as competent, ie. they demonstrate consistency among the profile, vision and mission. However, crossing variables, we see that neither the vision nor mission, much less the profile, is consistent with the proposed philosophical base, ie. in 50% of the Education Units, there are no profile proposals based on biblical principles.

Thirty-three percent (33%), as shown in the scoring table, is rated between "need for development" and "significant need for development."

Table #18

Criteria	Good News A	Isabel Villegas	Good News B	Philadelphia	Bethany	Good News C
The EU has a graduate profile (GP) consistent with the vision and mission	The GP is consistent with the vision and mission	The GP is consistent with the vision and mission	The GP is consistent with the vision and mission	The GP is consistent with the vision and mission	The profile has few elements consistent with the vision and mission	There is no consistency
Score	Competent	Competent	Competent	Competent	Need for development	Significant need for development

8. Curricular components consistent with the bases of the curriculum

Curricular components are the areas, disciplines, skills and evaluation of the proposed curriculum.

The curricular bases are philosophical, Biblical, psychological, anthropological, etc.

Eighty-three percent (83%) of the Educational Units shows need for development. Few curricular components are related to the bases. This data can be crossed with the first variable, since if an Educational Unit has no philosophical manifesto or if its manifesto is confusing, it is to be expected that there be no relation between the manifesto and other curricular components.

Table # 19

Criteria	Isabel Villegas	Philadelphia	Good News A	Bethany	Good News B	Good News C
Curricular components are the curricular base	The elements are consistent with the curricular base	The components have few consistent elements	The components have few consistent elements	The components have few consistent elements	The components have few consistent elements	The components have few consistent elements
Score	Competent	Need for development	Need for development	Need for development	Need for development	Need for development

9. Graduate profile with mention of identity, skills and style

We can see that 67% meets the profile standard, just as they were taught in courses and workshops. However, crossing this variable with 5, 6 and 7 reveals inconsistency between the profile and other variables. This suggests that the profile is not an important component for guiding and regulating the proposed curriculum but rather a theoretical element that has remained on paper.

Table #20

Criteria	Good News A	Good News B	Good News C	Philadelphia	Bethany	Isabel Villegas
Graduate profile with a statement of identity, competence and style	The profile meets the three components	The profile meets the three components	The profile meets the three components	The profile meets the three components	Profile has two components	Profile has two components
Score	Competent	Competent	Competent	Competent	Need for development	Need for development

10. End skills for all areas of educational development and for all cycles according to the graduate profile

End skills are learned, socially useful abilities; end skills are those that are found at the end of the education cycles.

Cycles are spaces of time greater than grades, where students develop skills at their own learning pace.

As shown in Table #10, 67% of Educational Units meets the standard for all educational development areas and cycles with the profile. It is the only variable under which standards are met, but it should be noted that these skills have not been mainstreamed together with Biblical principles or values, as we will see in variable 11.

Table # 21

Criteria	Good News A	Good News B	Good News C	Bethany	Isabel Villegas	Philadelphia
End skills for all areas of educational development and for all cycles according to the graduate profile	Has skills for all areas of educational development and cycles according to the profile	Has skills for all areas of educational development and cycles according to the profile	Has skills for all areas of educational development and cycles according to the profile	There are few skills, only in some cycles	There are few skills, only in some cycles	Does not have end skills
Score	Competent	Competent	Competent	Need for development	Need for development	Significant need for development

11. End skills that go beyond conceptual content and integrate principles and values

Fifty percent (50%) of Educational Units lacks the end skills described as principles and values; only 33% shows evidence of coherence.

Only the *Good News* Educational Unit shows strength under this variable.

Table #22

Criteria	Good News B	Good News C	Good News A	Bethany	Isabel Villegas	Philadelphia
End skills that go beyond conceptual content and integrate principles and values	It integrates skills, principles and values very well and applies them	It integrates all skills, principles and values	It integrates all skills, principles and values	Few aspects of principles and values are integrated into end skills	Few aspects of principles and values are integrated into end skills	It does not integrate principles or values
Score	Strength	Competent	Competent	Need for development	Need for development	Significant need for development

12. Annual plans define topics, units, learning content and time frames in general

A relevant fact under this variable is that all of the Educational Units fully met the standard of "competent." However, we should clarify that although PDI's proposed curriculum was based on training teachers to integrate these components into their plans, teachers already included these teaching components in their plans prior to the proposal's implementation.

In addition, one sees very little mainstreaming of Christian principles and values in the reviewed documents.

2.3.4.1. Overall results of the review of documents

Overall, from the 12 variables, we can see that the Educational Units showing the greatest weakness in the review of documents were

Philadelphia, Good News A, Good News B and *Bethany*, as we can see in the chart; and *Good News A* and *Bethany* have important strengths in some of the revised documents.

The "competent" Educational Units, ie. those that meet the standard although not by 100%, are *Isabel Villegas* and *Good News C*.

Chart No. 13
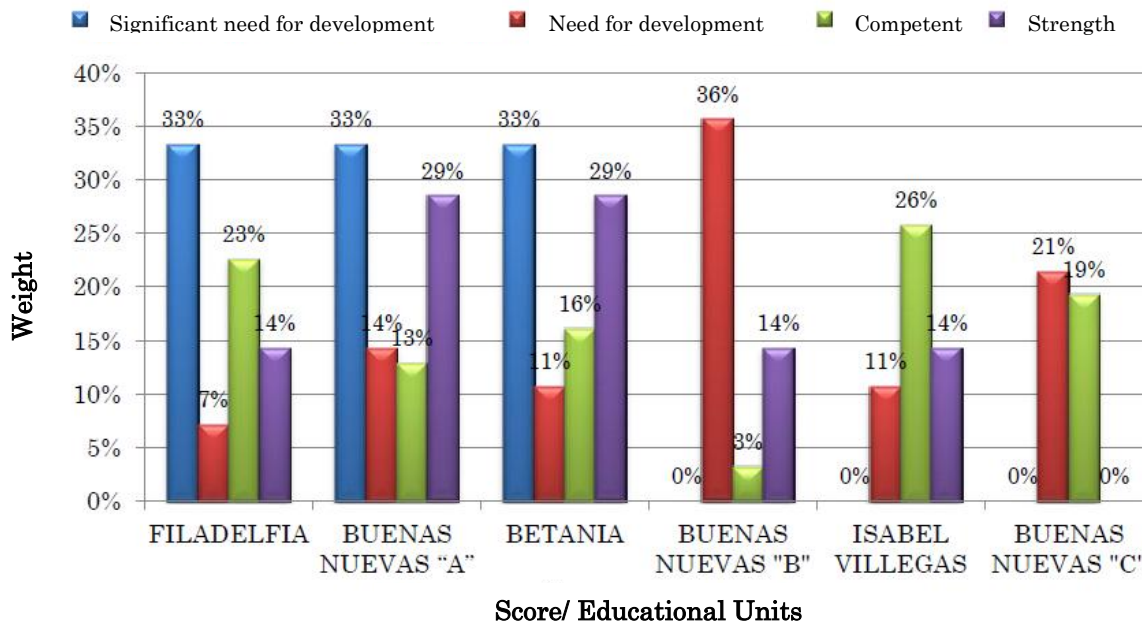
Upon conducting the literature review of the document "Proposed curriculum," we can verify that some conditions for the philosophy of education through principles to become practice are the training and monitoring of those who develop and implement the document.

One should also take into account that if the terminology is new, it is far more difficult to apply. Topics such as Biblical worldview, relationship principles, pedagogy of the way and other concepts are new ways of thinking for teachers, and it takes time to understand and implement these ideas.

Therefore, we can deduce that the philosophy of Christian principles and values was not understood or implemented either.

Nor did one see those documents take priority as guiding documents of the educational process.

The evaluated Educational Units do not really have documents that verify, at least, whether the proposal has been taken into account in the curriculum in a coherent way and prioritized.

The review of documents shows predominance of the government curriculum and little presence of the PDI proposal.

2.3.4.2. Results of Classroom Observation

Evaluation by classroom observation was conducted among a total of 38 people: 6 teachers per unit, divided in two groups, 20 trained in the professional development program (PDPD) and 18 untrained, as shown in the figure below:
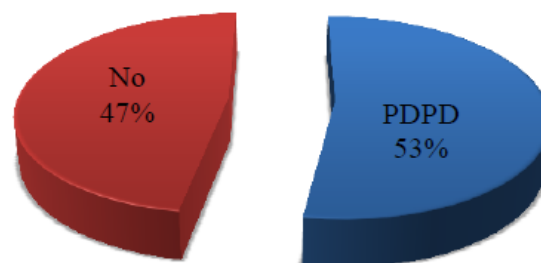
Three (3) variables and 15 indicators were evaluated according to the following criteria:

A scale of 5 to 1 as described below was used for scoring:

1 = It is neither planned nor applied in the classroom. (Significant need for development)
2 = It is planned but not applied. (Need for development)
3 = It is planned and applied in the classroom. (Competent)
4 = It is successfully applied in more than 50% of students. (Strength)
5 = It is successfully applied in 100% of students. (Significant strength)

Based on these assessment parameters, results indicate that teachers in both groups (trained and untrained) in the different Educational Units meet needs for educational development (reasoning, organization and study skills, etc.) and education for production, scoring between 4 and 3 on a scale of 5, which can be considered as teacher competency and strength. With regard to teachers meeting students' real needs for personal development, assessment results assign scores below 3.5, which corresponds to improvement opportunities for teachers with and without training. Within Units Good News B (Santa Cruz) and Isabel Villegas (Trinidad), teachers who had received training said they have used planning and implemented PDI project curricular adjustments, as shown in the figure below:

Chart No. 14
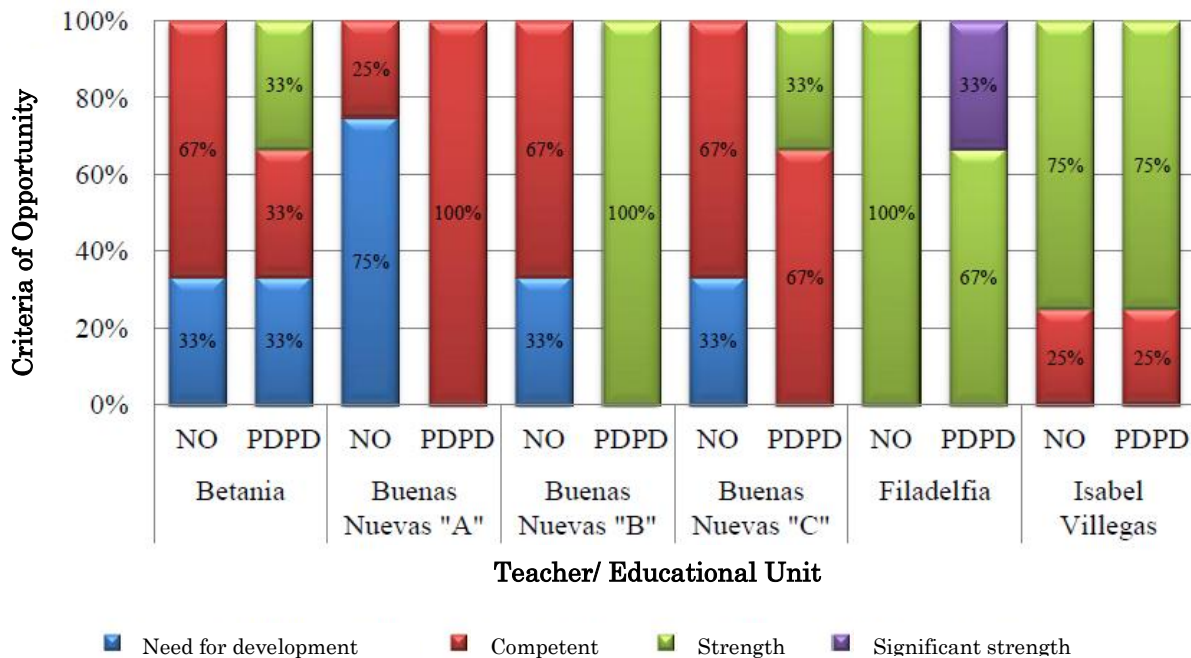
1. The teacher responds to needs for academic development and education for production.

As can be seen in Figure #2, there is a predominance of the development of academic skills. This is consistent with the documents; teachers try to meet the academic standards set by the government. To delve deeper into this variable, observations were made according to the following indicators, listed in column 1 of Chart #3.

Chart #16. Classroom observation of two groups of teachers in the 6 Educational Units according to criteria for verifying academic development and education for production

Indicators of verification in the classroom
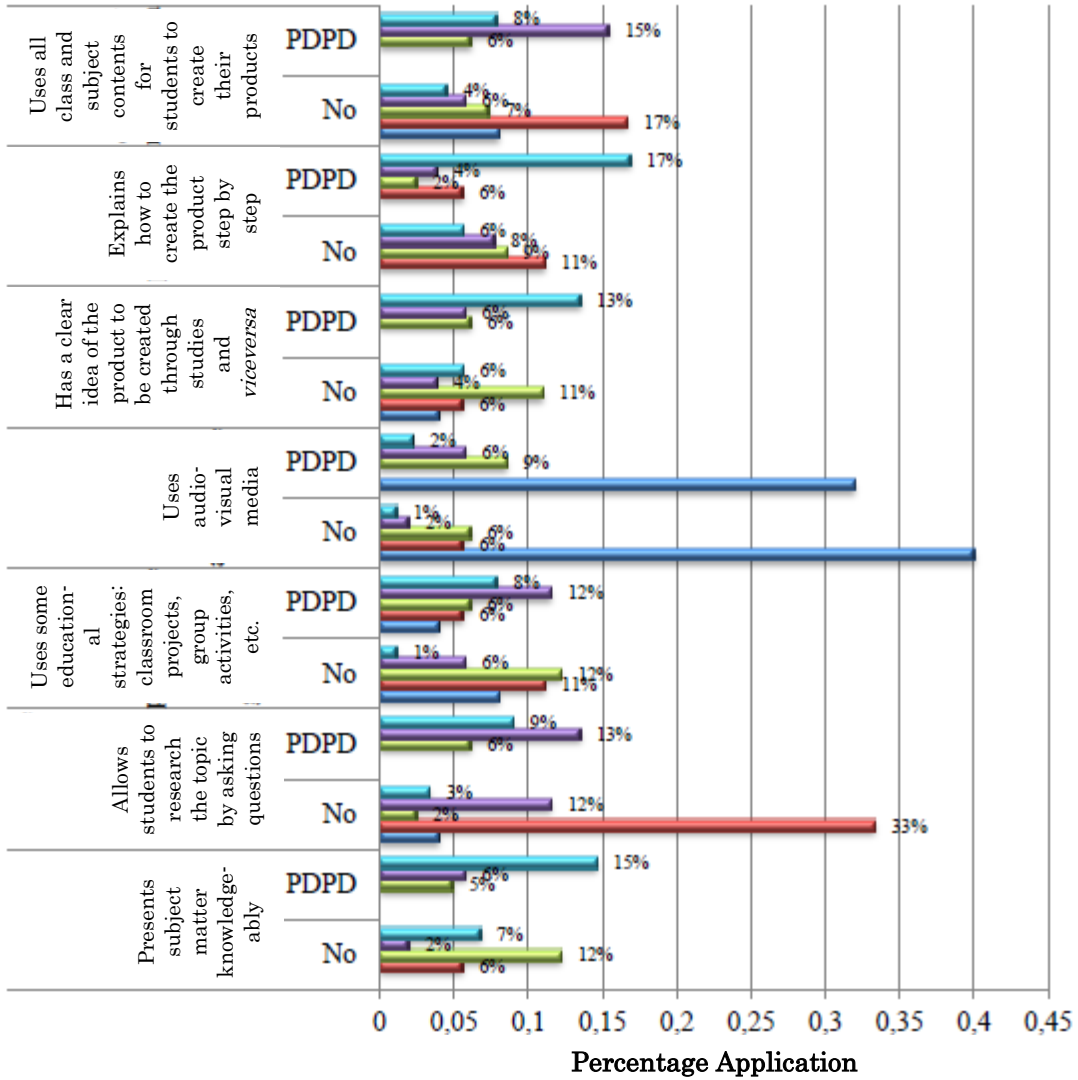
Uses all class and subject contents for students to create their products

PDPD
- 8%
- 15%
- 6%

No
- 4%
- 6%
- 7%
- 17%

Explains how to create the product step by step

PDPD
- 17%
- 4%
- 2%
- 6%

No
- 6%
- 8%
- 5%
- 11%

Has a clear idea of the product to be created through studies and *viceversa*

PDPD
- 13%
- 6%
- 6%

No
- 6%
- 4%
- 11%
- 6%

Uses audio-visual media

PDPD
- 2%
- 6%
- 9%

No
- 1%
- 2%
- 6%
- 6%

Uses some educational strategies: classroom projects, group activities, etc.

PDPD
- 8%
- 12%
- 6%
- 6%

No
- 1%
- 6%
- 11%
- 12%

Allows students to research the topic by asking questions

PDPD
- 9%
- 13%
- 6%

No
- 3%
- 12%
- 2%
- 33%

Presents subject matter knowledge-ably

PDPD
- 15%
- 6%
- 5%

No
- 7%
- 2%
- 12%
- 6%

Percentage Application

0   0,05   0,1   0,15   0,2   0,25   0,3   0,35   0,4   0,45

- ■ 100% (It is successfully applied in 100% of students.)
- ■ 75% (It is successfully applied in more than 50% of students.)
- ■ 50% (It is planned and applied in the classroom.)
- ■ 25% (It is planned but not applied.)
- ■ 0% (It is neither planned nor applied in the classroom.)

Presents subject matter knowledgeably: Fifteen percent (15%) of trained teachers observed in the classroom successfully meet this indicator, having significant strength; however, only 7% of untrained teachers does the same.

It is relevant to note that untrained teachers, ie. 12%, are competent in regard to planning and applying subject matter compared to 5% of trained teachers.

These data suggest that untrained teachers have strengths in terms of planning. This catches our attention, because PDP project teachers should have strength in this area, since they were trained to prepare a teaching guide with detailed plans.

Allows students to research the topic by asking questions: Thirty-three percent (33%) of untrained teachers, the highest value, shows significant need, since they manage the classroom in a traditional way, ie. not encouraging students to ask questions.

Thirteen percent (13%) of trained teachers shows strength in this area.

This observation is very important, demonstrating that teachers continue traditional educational practices, where teachers present and students listen.

Uses some educational strategies: riddles, classroom projects, group activities, etc. Twelve percent (12%) of trained teachers shows strength in this area, using these strategies. The same percentage (12%) of untrained teachers uses these strategies but scores as "competent."

The teacher uses audio-visual media: videos, maps, pictures, etc.

Thirty-two percent (32%) of trained teachers and 40% of untrained teachers shows a significant need for development. This is a very important fact to consider, since teachers do not use audio-visual media for lack of knowledge about how to use them or due to administrative problems affecting access or shortages.

Has a clear idea of the product to be created through studies and *vice versa*: We can observe that 13% of trained teachers meets this indicator with significant strength, compared to 6% of untrained teachers.

We can infer that trained teachers develop this skill and knowledge thanks to PDP training but also that they already had these skills, which were reinforced through training.

Explains how to create the product step by step: Seventeen percent (17%) of trained teachers explained in detail what students should do in the classroom, compared to 6% of untrained teachers. This suggests that trained teachers have better skills for leading classroom work by product.

Uses all class and subject contents for students to create their products: Trained teachers, ie. 15%, are those who most use and ground content, making it concrete through products, compared to 6% of untrained teachers. We note that 17% of these teachers, although having planned to ground content fail to do so, thus needing development.

In conclusion, in regard to this variable and teachers in the 6 observed Educational Units, we can say the following: Fifty-three percent (53%) of trained teachers have gaps in training, ie. there may be methodological or instrumental gaps. Fourty-seven percent (47%) of trained teachers have even more justifiable and obvious training needs.
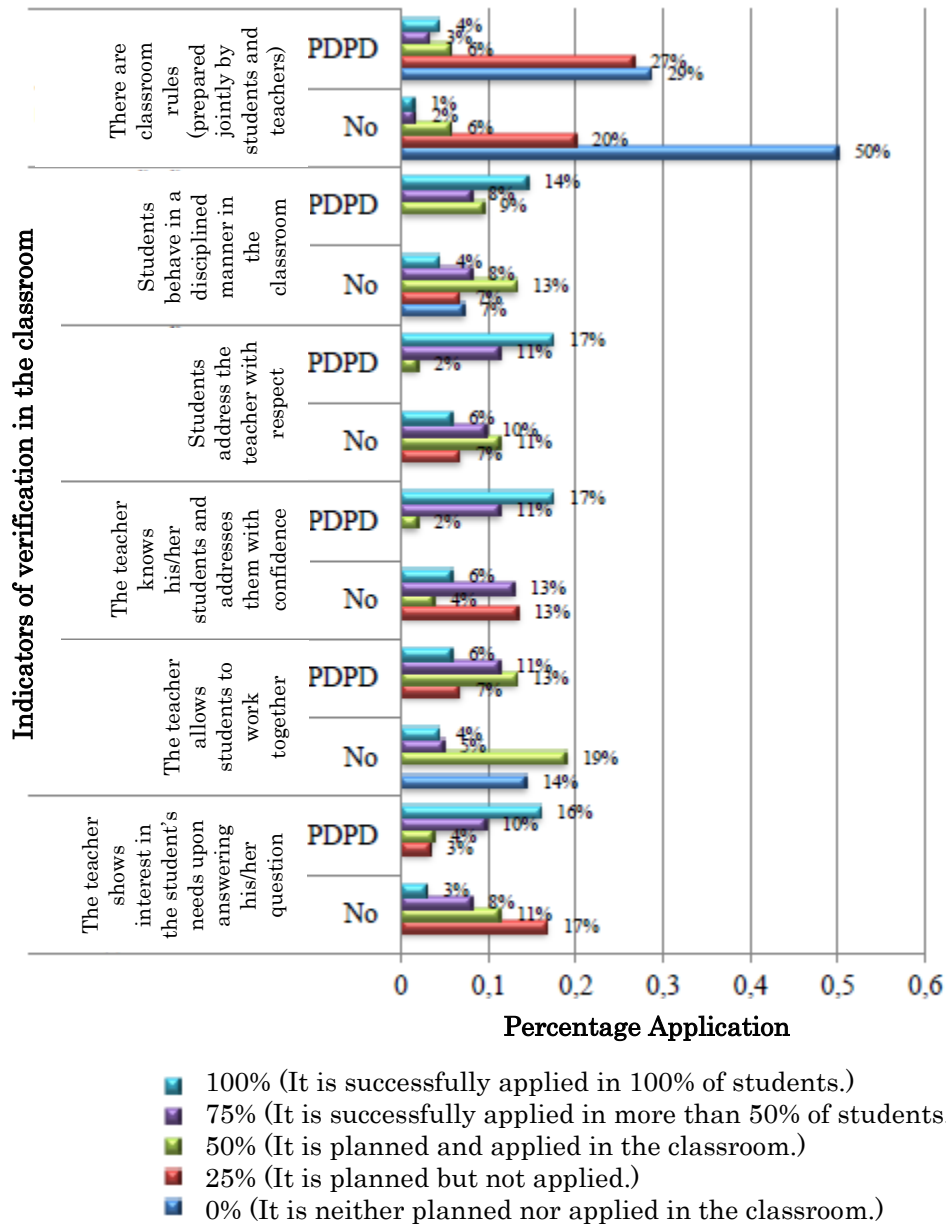
Teacher training for both groups would help improve their performance and develop skills in students. A system of continuous training and follow up is recommended for

- Classroom management
- Use of audio-visual media and an introduction to educational technologies ("Tics" by its abbreviation in Spanish)
- Metacognitive, recreational and research strategies

2. The teacher responds to real needs the student faces in personal development (convictions and relationship principles)

Under this variable, we try to assess whether relationship principles and the principle of authority were made practical in everyday life. To this end, six indicators were analyzed. See chart #17.

Chart No. 17

Indicators of verification in the classroom

Legend:
- 100% (It is successfully applied in 100% of students.)
- 75% (It is successfully applied in more than 50% of students.)
- 50% (It is planned and applied in the classroom.)
- 25% (It is planned but not applied.)
- 0% (It is neither planned nor applied in the classroom.)

The teacher shows interest in the student's needs upon answering his/her questions: The intention was to observe relationships between teachers and students with the treatment teachers could give their students as an indicator of a "good atmosphere in the classroom."

The results were positive for trained teachers, since 16% demonstrated significant strength, compared to only 3% of untrained teachers.

The teacher allows students to work together: Here we see a curious fact, namely that 19% of untrained teachers allows students to work collaboratively, compared to 13% of trained teachers.

The teacher knows his/ her students and addresses them with confidence: Seventeen percent (17%) of trained teachers scores significant strength, compared to 6% of untrained teachers.

Students address the teacher with respect: Seventeen percent (17%) of trained teachers scores significant strength, compared to 6% of untrained teachers.

Students behave in a disciplined manner in the classroom: Fourteen percent (14%) of trained teachers' students behave in class and score significant strength; 13% of untrained teachers scores as competent.

There are classroom rules (prepared jointly by students and teachers): Fifty percent (50%) of untrained teachers does not have rules in the classroom; 29% has plans but does not implement them. Twenty-nine percent (29%) of trained teachers does not have rules; 27% has plans but does not implement them.

In conclusion under this variable, we can see that trained teachers have had better results than untrained ones. However, even with deficiencies in planning and practice, it became evident that trained teachers did not base class plans on the teaching guide, which evidences their descent from principles and values.

3. Uses curricular adjustments that were made in the curriculum with the PDI project

Curricular adjustments are educational innovations that one tried to implement in PDI target Educational Units. The data we can observe and their subsequent breakdown will show us whether or not these adjustments were made and, in some cases, we will learn why they could not be implemented.

Graph No. 18
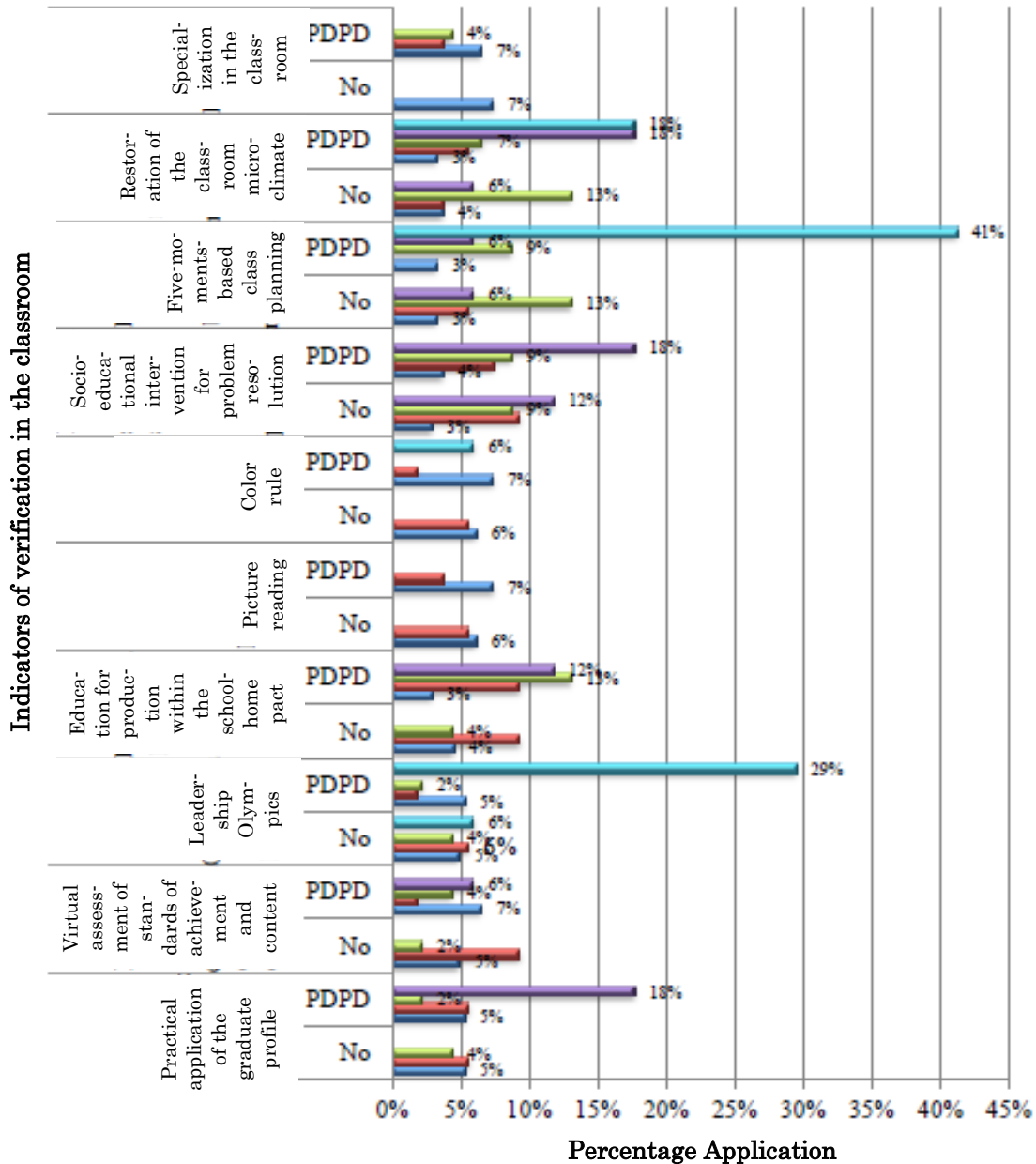
Indicators of verification in the classroom

- ■ 100% (It is successfully applied in 100% of students.)
- ■ 75% (It is successfully applied in more than 50% of students.)
- ■ 50% (It is planned and applied in the classroom.)
- ■ 25% (It is planned but not applied.)
- ■ 0% (It is neither planned nor applied in the classroom.)

Practical application of the graduate profile: Eighteen percent (18%) of trained teachers observed takes into account the student development profile, scoring strength. Untrained teachers, despite their

plans, do not apply profiles, scoring a significant need for development.

Virtual assessment of standards of achievement and content: Results are very poor. Only 6% of teachers mentioned having applied this methodology; the rest said that they had made plans but not applied the methodology for various reasons: lack of computers, lack training and lack of understanding of its use.

Leadership Olympics: Twenty-nine percent (29%) of trained teachers implemented this proposal with successful results in some cases, and only 6% of untrained teachers could do the same. It was noted that the proposal was not circulated to all of the Educational Unit as an important strategy.

Education for production within the school-home pact: Thirteen percent (13%) of trained teachers implemented the proposal, and 6% of untrained teachers said that it had been planned but not implemented.

Picture reading: Data shows that the proposal was planned but not implemented for various reasons: lack of equipment, lack of training and lack of understanding of the methodology and use.

Color rule: Same as above

Socio-educational intervention for problem resolution: Eighteen percent (18%) of trained teachers implemented the proposal; 12% of teachers* also implemented the proposal.

Five-moments-based class planning: Forty-one percent (41%) of trained teachers said they used these moments, but there was no evidence of this in their plans or teaching guide.

Restoration of the classroom micro-climate: Eighteen percent (18%) of trained teachers implements this proposal; 13% of untrained teachers said they had implemented this proposal but only among 50% of their students.

Specialization in the classroom: Four percent (4%) of trained teachers implements this proposal; the rest are unfamiliar with it and do not implement it.

2.3.4.1. Conclusions
The data show once again that the proposal was not consistently implemented in regard to the 10 curricular adjustments.

*Translator's note: Probably "untrained teachers"

These results show us that the PDI proposal was gradually diluted in practice, since the implementation rate is low among trained teachers, but it can be observed that untrained teachers are not implementing it. Here one can deduce in regard to the management of Educational Units that internal staff training is not continuous, there is no follow up, and guiding elements of the curriculum and education management are not circulated.

As the evaluation team, we believe that any proposed curriculum should have important support in in the areas of education management, training and monitoring.

One should also carry out pilot projects and controlled tests of any educational materials to be introduced into the Educational Units, watching for sustainability.

2.3.5. Strategic Pillar 5: Monitoring and Evaluation

2.3.5.1. Background Information Relevant to the Review of Documents

The review of documents relating to monitoring and evaluation evidenced the following:

a) The five-year strategic institutional development project for 2007-2011 establishes an organizational structure for monitoring, evaluating and managing processes on 4 levels.

The project uses a methodology rooted in MSLB structures, which targets the grant agreement's Educational Units as such. In the new arena and current population, there are no Educational Units under the grant agreement; therefore, this structure for monitoring and evaluation is not applicable.

In the same document (pp. 35 and 36), as part of PDI-BOL planning, one of the components relating to evaluation and monitoring establishes strategic tools for evaluation, participatory monitoring policies and standards for management processes in each component of the educational community.

Assessment tools, such as the so-called strategies for monitoring and evaluation, are not evidenced in reports or other documents belonging to the organization.

b) The document proposed by the Department of Curriculum Development and PDI-BOL Processes in 2010, entitled "Towards a Culture of Quality in Education by Christian Principles and Values" mentions that the system of monitoring and evaluation is continuous and comprehensive, in accordance with the quality-in-education scale (p. 1).

There are no documents confirming whether the continuous and comprehensive evaluations have been conducted.

The conditions of monitoring and evaluation (p. 42) establish that, for a culture of quality in education by Christian principles and values to exist, the Educational Unit and its quality-in-education network must participate in the following assessments:

1. Half-yearly evaluations based on the quality scale
2. Half-yearly evaluations of achievement and content

3. Half-yearly evaluations of relationship, ethical and academic dimensions
4. System of incentives by EU for progress on the quality scale

This document mentions quality-in-education networks, but no other documents substantiate these networks' creation or work.

Regarding half-yearly evaluations, there is no record of these in the PDI-BOL office or Educational Units.

c) The document on the pillar that is the system for monitoring and evaluation, prepared by the technical education advisory team, establishes scope, variables, indicators and chronological order for evaluations.

Initially, the five-year development plan for 2007-2011 did not regard monitoring and evaluation as a strategic pillar. Then, in successive documents, it is taken into account as a strategic pillar (curriculum development proposal and system of monitoring and evaluation).

Previously, there was no record of evaluations of indicators proposed in the development plan.

d) The mid-term PDI-BOL project evaluation report, dated June 25, 2009, states in regard to unachieved results:

- Delay in the sending of teachers' work, regarded as second-order problems (p. 5)

- Parents' participation is weak, since they were not included from beginning. Some stated that they had some difficulty understanding the project (p. 6).

- Lack of a plan for monitoring and evaluation (page 6)

After these observations were made, there was no appropriate response to address these issues.

e) The annual PDI-BOL activity implementation reports for 2007, 2008, 2009 and 2010 highlight progress and important achievements related to the strategic pillars, described generally.

There has been no evidence of documentation available (quarterly or half-yearly monitoring or evaluation reports) to substantiate progress described in the reports.

f) Monitoring and evaluation report to the PDI dated October 25, 2010: The report notes the need to coordinate and address shortcomings that are a priority with regard to project direction.

g) Evaluation report of PDI-BOL staff performance for 2007-2010, dated January of 2011: It is recommended that Administration manage its human resources strategically by skills.

Three documents were presented as evidence of formal monitoring and evaluation: mid-term evaluation report, evaluation report of staff performance and monitoring and evaluation report.

2.3.5.2. Evaluation Criteria

Instruments assessed 8 variables broken down into 21 indicators that were scored on a quality scale of 1 to 5. The intent of this type of scoring was to allow the quality assessment to offer a detailed understanding of the degree of compliance with standards. The scale is described below:

1. Significant need for development (0% attainment of the indicator): This indicates that few or none of the standards/ norms relevant to the PDI-BOL proposal have been met.
2. Need for development (25% attainment of the indicator): This indicates that some of the standards/ norms relevant to the PDI-BOL proposal have not been met or have only partially been met. Therefore, it is necessary to improve substantially in the area of monitoring and evaluation.
3. Competent (50% attainment of the indicator): This indicates that the Education Unit is substantially meeting the standards/ norms relevant to the PDI-BOL proposal.
4. Strength (75% attainment of the indicator): This indicates that teachers exceed standards/ norms, taking initiative to innovate or improve quality in education.
5. Significant strength (100% attainment of the indicator): This indicates that the teacher is greatly exceeding standards/ norms and demonstrating a very high standard of curriculum planning and innovation. A "significant strength" is often a best practice that could be celebrated and promoted with others.

(Table No. 23)

Monitoring and Evaluation Instrument		Educational Units					
		Philadelphia	Bethany	Good News A	Good News B	Good News C	Isabel Villegas
Philosophical-curricular coherence	Curricular components are consistent with the bases of the curriculum	Maintains and applies consistency	Little consistency	Little consistency	Little consistency	Little consistency	Little consistency
	System of operating curriculum evaluation	A plan with regular monitoring and evaluation	A plan with quarterly evaluations	A plan with quarterly evaluations	A plan with quarterly evaluations	A plan with regular monitoring and evaluation	A plan with quarterly evaluations
Fair and efficient regulations	Parents are organized in a school board and have regulations consistent with the curriculum project and philosophical manifesto	There are coherent regulations, and they are more or less applied	There are coherent regulations, but they are not applied	There are coherent regulations, and they are more or less applied	There are coherent regulations, and they are more or less applied	There are coherent regulations, and they are more or less applied	There are coherent regulations, but they are not applied
	Teachers use teaching evaluation regulations consistent with the curriculum project and philosophical manifesto	They use regulations with some consistency	They used forms of evaluation; there are no regulations	They used forms of evaluation; there are no regulations	They used forms of evaluation; there are no regulations	They used forms of evaluation; there are no regulations	They used forms of evaluation; there are no regulations
	Students are organized into a student center with regulations consistent with the curriculum project and philosophical manifesto	There are coherent student regulations	There are incoherent student regulations	There is no documen-tation	There is no documen-tation	There is no documen-tation	There is no documen-tation
Curriculum design	Schedules consistent with curriculum structure	Consistency is acceptable	Consistency is minimal	Consistency is fair	Consistency is fair	Consistency is fair	Consistency is minimal
	There is an annual calendar that allows for the development of graduate-profile end skills	It is takes into account the development of end skills	It is takes into account the development of end skills	It takes them into account imprecisely	It takes them into account imprecisely	It takes them into account imprecisely	It takes them into account imprecisely

Monitoring and Evaluation Instrument		Educational Units					
		Philadelphia	Bethany	Good News A	Good News B	Good News C	Isabel Villegas
Academic Regulations	There are regulations for directing teacher and student activities related to curriculum-based teaching	They exist, are applied and have good results	The document exists	It does not exist	In process of elaboration	It does not exist	It does not exist
	There are regulations for evaluating and monitoring teacher and student activities related to curriculum-based teaching	The document exists	It does not exist	It does not exist	It does not exist	It does not exist	It does not exist
System of support, monitoring and evaluation	The system has been agreed upon by EU teachers under the supervision of an external evaluating entity	There is a moderately consensual system	There is a system that is just becoming consensual	There is no system of evaluation	There is no system of evaluation	There is no system of evaluation	There is no system of evaluation
	The system is managed by the EU principals with Network support for quality education by principles	It exists and is being managed fairly	There is no system of quality assessment	It exists and will be implemented soon	It exists and is being handled fairly	It exists and will be implemented soon	It exists and will be implemented soon
	It presents tools and techniques for systematizing and disseminating innovative experiences in a wider network (RECP)	It presents clearly precise instruments	It presents none	It presents none	It presents none	It presents none	It presents imprecise instruments
	It allows feedback from teaching	Never	Never	Rarely	Rarely	Rarely	Sometimes
Definition and planning by the management team	It defines an annual schedule of activities (management team)	It has a fairly defined schedule	It has a poorly defined schedule	It has a poorly defined schedule	It has a defined schedule	It has a fairly defined schedule	It has a poorly defined schedule
	They prepare a participatory diagnosis	They are developing a participatory diagnosis	They have no participatory diagnosis	They have no participatory diagnosis	They have no participatory diagnosis	They have no participatory diagnosis	They are planning a participatory diagnosis

	Monitoring and Evaluation Instrument	Educational Units					
		Philadelphia	Bethany	Good News A	Good News B	Good News C	Isabel Villegas
	Properly equip RAFUE regulations with standards of conduct for the education community consistent with the mission and vision	They are in the process of adapting regulations	There is only RAFUE	There is no document	There is no document	There is no document	There is only RAFUE
	They define maintenance policies	There are no policies	Fairly defined policies	Unclear policies	Fairly defined policies	Unclear policies	Defined policies
Project ownership	EU management promotes the participation of its educational community in project dynamics	Promotes participation in several activities	Promotes participation in one activity	Promotes participation in some activities	Promotes participation in some activities	Promotes participation in some activities	Promotes participation in several activities
	The EU develops its own identity, reflected in the PDI	Clear	Clear	Is not observed	Is not observed	Is not observed	Clear
Evaluation	5 or more sub management teams established according to the Educational Unit's regulations and needs	It has 4 sub management teams	It has 1 sub management team	It has 5 or more sub management teams	It has 5 or more sub management teams	It has 5 or more sub management teams	It has 5 or more sub management teams
	Evaluates participation processes according to the quarterly schedule	Evaluates on a quarterly basis	Evaluates on a quarterly basis	The management team has no schedule	The management team has no schedule	The management team has no schedule	Evaluates on a quarterly basis
	Weight	Competent	Need for development	Need for development	Need for development	Need for development	Need for development

2.3.5.3. Analysis of the breakdown of the evaluation and monitoring of six Educational Units

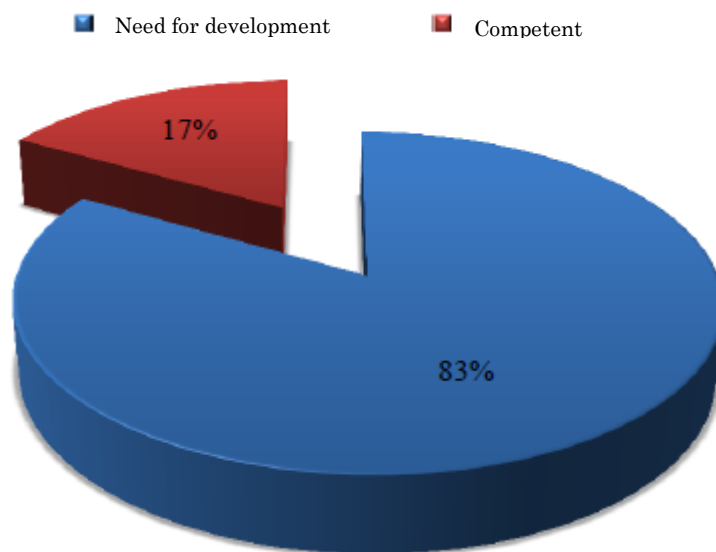Below is a description of the results of each variable on the basis of its evaluated indicators.

Chart No. 19. Breakdown of the evaluation and monitoring of six Educational Units

Philosophical-Curricular Coherence

From results in the area of curriculum components consistent with the bases of the curriculum, one can see coherence and application in Educational Unit Philadelphia and little coherence in the other five Educational Units (Good News A, Good News B, Good News C, Isabel Villegas and Bethany).

On the other hand, with regard to the operating curriculum evaluation system, it can be seen that there is a plan with continuous monitoring and evaluation (in EUs Philadelphia and Good News C), and the other four Educational Units have their quarterly evaluations (Bethany, Good News A, Good News B and Isabel Villegas).

Fair and Efficient Regulations

In regard to fair and efficient regulations in the Units, which involves parents, teachers and students in the evaluated Educational Units, it was observed that Educational Unit Philadelphia has coherent regulations for parents and applies them

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fairly consistently, and teachers and students in the same Unit have coherent regulations. In contrast, regulations in Good News A, B and C are coherent for parents and teachers but not students, and there is no documentation to support regulations.

As for Educational Units Isabel Villegas and Bethany, it was observed that regulations are coherent but not applied (parents), there is inconsistency in student regulations (EU Bethany) and there is no documentation supporting regulations (EU Isabel Villegas).

Curriculum Design

Curriculum design in Educational Units takes into account the current cycle's annual plan, which describes class schedules with regard to curriculum structure and the annual calendar and allows students to develop graduate-profile end skills. Results are as follows: Schedules and curriculum structure are consistent acceptably so (EU Philadelphia), fairly so (EUs Good News A, B and C) and minimally so (EUs Isabel Villegas and Bethany). The annual schedule takes into account the development of end skills in EUs Philadelphia and Bethany but only imprecisely in EUs Good News A, B and C and Isabel Villegas, which hinders the development of skills described in the graduate profile.

Academic Regulations

Results from the evaluation and findings from Educational Units' internal regulations show the existence of regulations and good results (in the case of EU Philadelphia), regulations without results (EU Bethany), regulations under development (EU Good News B) and, finally, the absence of regulations (EUs Good News A and C and Isabel Villegas).

The opportunities for improvement in this area are great, since there are no regulations for evaluating and monitoring teachers' or students' activities, which sets back the curriculum's educational activities.

System of Support, Monitoring and Evaluation

Educational Units have found themselves excluded from PDI-BOL project contributions, because there is no system of evaluation run by the entity for EUs Good News A, B or C or Isabel Villegas. However, it was observed that there is a fairly consensual system in EU Philadelphia and the beginnings of

supervision in EU Bethany. With regard to the system managed the Educational Units' principals with support from the Network for quality in education, EUs Philadelphia and Good News B stated that they apply this system to a fair extent; EUs Good News A and C and Isabel Villegas are gradually implementing it; and EU Bethany has no system of quality assessment.

Another parameter that showed opportunities for improvement was the technical instrument for disseminating innovative experiences in a wider network (RECP). The Units responded as follows: Philadelphia and Isabel Villegas use this instrument but not the other four Units. This means that Educational Units rarely or never receive feedback (rarely in the case of EUs Good News A, B and C; and never in the case of Philadelphia and Bethany).

Definition and Planning By the Management Team

This element focuses on annual activities planned by the management team. For these activities, some Educational Units state that they have a defined schedule (EUs Good News A and B), others have one that is more or less defined (EUs Philadelphia and Good News C) and still others have one that is poorly defined (EUs Isabel Villegas and Bethany). With regard to participatory diagnosis, most EUs do not have one (EUs Good News A and B, C and Bethany); one EU is planning one (Isabel Villegas).

According to RAFUE regulations with regard to standards of conduct for education communication in agreement with the mission and vision, results reflect the existence of this process (EU Philadelphia), the presence of only RAFUE regulations (EUs Isabel Villegas and Bethany) or the lack of a document (EUs Good News A B, and C).

Maintenance policies within Educational Units are defined (EU Isabel Villegas), fairly defined (EUs Bethany and Good News B), unclear (Good News A and C) or nonexistent (EU Philadelphia).

Project Ownership

Each of the Educational Units should promote the participation its educational community in PDI-BOL project dynamics. Results indicate that this is fostered in various activities (by EUs Philadelphia and Isabel Villegas), in some activities (by EUs Good News A, B and C) or in one activity (by EU Bethany). The development of unique identities in Educational Units'

PDIs is clear (EUs Philadelphia, Isabel Villegas and Bethany) or unapparent (Good News A, B and C).

Evaluation

The evaluation by Educational Unit seeks to verify PDI documents (the Management Team Manual). Results from the six EUs show that there are five or more sub management teams (Good News A, B and C and Isabel Villegas). EU Philadelphia has four teams, and EU Bethany has only one management team. In regard to participatory processes, these are evaluated on a quarterly schedule (in EUs Philadelphia and Bethany); other management teams have no schedule nor evaluate.

The 22 elements evaluated in the six educational units show opportunities for improvement in eight areas of monitoring: philosophical-curricular coherence; fair and efficient regulations; curriculum design; academic regulations; system of support, monitoring and evaluation; definition and planning by the management team; project ownership and evaluation. This applies to 83% to EUs; only 17% shows competence in the above-mentioned areas.

2.3.5.4. Conclusions

a) PDI-BOL documents: Review of the five-year strategic institutional development project for 2007-2011, document proposed by the Department of Curriculum Development and PDI-BOL Processes in 2010, pillar system of monitoring and evaluation, mid-term PDI-BOL project evaluation report of June 25, 2009, annual reports, monitoring and evaluation reports and staff performance evaluation report

- There is evidence of unclear roles in PDI-BOL's different parties with regard to monitoring and evaluating the project during its implementation and allowing necessary adjustments
- Lack of a systematic plan for monitoring and evaluation
- Lack of practical tools useful for formal monitoring and evaluation

b) The assessment, based on Educational Units' documents, of elements involving the evaluation and monitoring of each Educational Unit, shows that EU Philadelphia is competent in the eight areas, and the other EUs have opportunities for improvement in the interest of good administration and education for students.

CHAPTER III: RECOMMENDATIONS

Chapter III: Recommendations

3.1 Recommendations for Managing the Evaluated Instances

3.1.1. Strategic Focus

Officials responsible for the PDI-Bol project and those who make up the FES framework entity have the task of seeking expert advice. These experts should help them structure and better formulate their ideas to translate them into clear and precise systems of planning, implementation, evaluation, monitoring and control.

It is recommended that Strategic and Operations Planning be performed according to a defined methodology to ensure measurements for and coherence among strategy and operations.

3.1.2. Focus on Processes and Document Structure

The Five-Year Strategic Institutional Development Project should be presented in a document approved by FES, CEN and the funder. The document should contain information that allows for its transferability, in other words, date of issue and persons responsible for preparation, review and approval. Modifications made to the project document, in target group and budget for example, must be formally documented and supported.

All Requests for Incorporation FORM 01/PDI of the fourteen Educational Units under the PDI-Bol agreement must be completed. These evidence the date of request and of EU integration into the project.

The Project Contracts FORM 02-PDI of the fourteen Educational Units under the agreement must be updated. These fourteen contracts must be renewed and include contract dates, avoid writing mistakes, complete blank spaces and support signatures with identity documents. At present, contract errors legally invalidate the documents.

3.1.3. Focus on Resource Management

Actions should be taken to ensure the ready availability of accounting ledgers that support all movements and allow them to be traced. Receipts are attached to the yearly economic reports, but they are not organized by any criterion. Said reports also fail to include the general ledgers that allow all information

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presented in the income and expense statement to be traced. Information stored in the accounting system for the period 2007-2009 is not easily recoverable.

If a Functions Manual has been prepared, it should be completed in greater detail with regard to responsibilities such as custody of Request for Incorporation FORM 01-PDI, Project Contracts FORM 02-PDI, investment files and internal control responsibilities, among other important topics.

3.1.4. Focus on Service Provision or Project Implementation

Pillar 1. Equipment and specialization of classrooms

In view of a lack of clear procedures for the *internal control* of Educational Units' infrastructure and previously reported important findings of deviant situations, to which one could not evidence a clear response, one should consider at least the following elements of *internal control*:

1. An approved procedure for Purchase Planning and Management. The version issued by the Accounting department is not known and used in all of the management teams, nor is it formal or approved.

2. Procedure for *codification* and for the realization of *periodic inventories* in EUs. Although this is a mandate for management teams, it is not done.

3. Procedure for the control of equipment use

4. Procedures for the control of equipment that requires repair or that should be retired

Pillar 2. Participation in the Educational Community

Although the management teams were constituted in the EUs, their functioning is heterogeneous with regard to roles, reach and responsibilities. In some of the EUs, the teams' role has been distorted, and teams assume even more authority than principals.

Parents and the management team in general need their structure and operational procedures defined, considering the importance of their organization for EU planning, implementation, monitoring and improvement.

Pillar 3. Teacher Training Program

Among essential tasks for any program's success, in this case an educational program aimed at teachers, one should consider project planning, identification, preparation, evaluation, monitoring and control. This makes it possible for the project o develop in a strategic planning framework that allows project to order, drive and orient actions toward the fulfillment of objectives.

It is advisable that one review the agreement/contract between the UEB and PDI-Bol to assess the pertinence of its continuity due to low performance with regard to meeting objectives. In view of this and considering the lack of supporting documents required of the UEB, it is recommended that PDI-Bol request an external audit of this institution that would review financial components and resource management.

Pillar 4. Curricular Innovation

Any curricular proposal should have important support in matters of education management, training and monitoring, In addition, one should carry out pilots and controlled tests of any didactic material to be introduced into the Educational Units, observing the materials' long-term potential.

It is necessary to consider the relevance of the human factor (teachers) as a decisive aspect in applying educational strategies or policies, since they are the agents responsible for implementing these proposals. Therefore, efforts to improve education quality would have to view the strengthening of human capital as fundamental.

One should consider that any curricular proposal should receive important support in matters of educational management, training and monitoring, pilots and controlled tests of any didactic material to be introduced into the Educational Units, observing the materials' long-term potential.[2]

Pillar 5. Monitoring and Evaluation

The Foundation for Education and Service, for PDI-Bol project implementation, has a pressing need to promote or institutionalize four basic elements of planning: long-term perspective or vision, coordination, evaluation and strategic harmonization. These functions, independently of the prevailing institutionality, will allow one to define a shared vision, facilitate the formulation of plans and

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[2] Translator's note: This information is repeated in the section.

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policies, support results-based management to know the impact and achievement of project goals and back up increased, decentralized and effective participation, both public and private.

Although one has defined the instances responsible for monitoring, analyzing and improving PDI-Bol activities, be it for lack of assigned resources (CEN) or lack of clarity with regard to the reach of responsibilities (National Management – FES Accountant), now that 90% of project period has passed, there are still no procedures or clear responsibility for this process; therefore, it is recommended that one formally create a hierarchy of authorities with responsibilities.

3.2 Recommendations for Quality Management in FES and CEN

One should analyze and review all of the *strategic lines* of linked organizations: FES, CEN, PDI-Bol and EUs and thereby establish the project's strategic guidelines.

For the current strategic PDI-Bol project; on the basis of initiatives developed by the area of Monitoring, follow-up and planning of the organization; one should establish the whole *structure of measurement* of objectives and goals that the project theoretically seeks.

The organizations FES and PDI-Bol should complete all expected components for *human resource management* on the basis of defined *position profiles*, better defined *functions manuals* and procedures for selecting and contracting personnel, etc.

One should clearly establish the *processes* and *relationships among processes and persons responsible* for all activities critical for the organization. While nominally one has designated *responsibility* to CEN for strategic follow-up and monitoring of PDI-Bol, one should review the coherence with regard the *authority* designated for this task. One should establish a clear plan for CEN's Monitoring and Follow-Up with the budget allocation consistent with designated responsibilities.

One should strengthen the area of Accounting and Internal Controls with the clear inclusion of procedures to be developed in FES, in PDI-Bol and principally in the EUs. This requirement takes on more importance, since it has to do with externally financed projects.

APPENDIXES