Reforming Education: Review of Methodological Approaches in Design and Implementation (Lessons from Jordan)

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DECEMBER 2, 2012
Approaches to Reform

Incremental change
- Risk Factors
  - Slow
  - Often Lacking Direction

Systemic Changes
(Based on assumptions of organic system)
- Risk Factors
  - Need to work at different levels at once
  - Labor & Time intensive

Piece-meal
- Risk Factors
  - Top Down
  - Rapid directive framework
  - Sustainability is an Issue
Mixes of Successes and Failures

Focus was on technical aspects out of its contextual factors
Focus was more on inputs than on Results
Reform is more of a project-based rather than a deeply embedded transformation movement
Reform is centrally developed and designed rather than in an inclusive manner/Top-down
Lack of accountability mechanisms and a coherent monitoring and evaluation framework
In conclusion,
Lots of Energy, Little light
“Talking about reforms is as good as having done them”
“Neither top-down nor bottom-up strategies for educational reform work;

What is required is a more sophisticated blend of the two.”
So-What can MOE do?? Any MOE???
Essential Elements of Success

- Planning reform.
- Implementing reform.
- Sustaining reform.

Management of reform.
I. Planning reform efforts:
   1. Leadership
   2. Goals: based on shared vision with wide support
   3. Timing: Reform takes time and involves risk.

II. Implementing proposed reforms:
   4. Training – Before
   5. Flexibility: to accommodate multiple fixes to a given problem. Not linear process.
   6. Infrastructure- redesigning organizational infrastructure.

III. Sustaining ongoing reforms:
   7. Managing resources
   8. Continuous M&E: reform is an ongoing process and maintaining reform in an evolving climate.
Introduction

• Misjudging ease of implementation is the most frequent error in policy planning. Implementation problems under estimated.

• Successful implementation requires practical strategies to manage change in a systematic way.

• Educational reforms are often rushed from design to implementation; Comprehensive, strategies and common-sense approach to reform implementation is key to successful implementation.
Essential elements for successful implementation:

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   1. Leadership
   2. Goals: based on shared vision with wide support
   3. Timing: Reform takes time and involves risk.

II. Implementing proposed reforms:
   4. Training – Before
   5. Flexibility:
      Reform Strategies should be flexible to accommodate multiple fixes to a given problem not linear process.
   6. Infrastructure- redesigning organizational infrastructure.

III. Sustaining ongoing reforms:
   7. Managing resources
   8. Self-assessment: reform is an ongoing process.
- Address before implementation.
- Continuously fine – tune strategies
- Continuous monitoring
Barriers to change

**PRESSNT STATUS QUO**

**DRIVING FORCES**
- Promise of greater financial incentives
- Threats
- Wish for better image with peer groups
- Societal complaints
- Ministry desire to do better
- Desire for greater Financial rewords

**RESISTING FORCES**
- Lack of knowledge about exactly what’s wrong
- Short – staffed
- Low morale
- Poor quality of in puts
- Low belief that there is Anything in it for us

**NEW STATUS QUO**

Reactions to change

I. Leadership

- Strong leaders lay a ground work for reform:
  - Creating a culture of change: from Change as a threat to an opportunity (recruiting and structuring)
  - Common understanding consensus – shared vision
  - Valuing collaboration
  - Supportive organizational environment.
  - Champions-advocates

  It is not enough to secure support at high levels.

- Strong leaders secure buy-in (reform communications for ownership) of reform
- Strong leaders delegate responsibility: (shared/distributed leadership)
II. Goals:

- Envisioning Reform Goals
  - Build consensus in order to maximize buy-in (ownership).
  - Common understanding
  - Overcome resistance.

- Build support for reform
  - Burn-out /Reform-fatigue/ should not rely on goodwill). Overwhelming with details or big jumps leads to burn out/ un-sustained dedication.
  - Reform takes time and effort, met with resistance or controversy and faces system barriers.

- Networking and communication

- Assigning Reform Responsibility:
  - Empowering individuals to make decisions can build commitment to reform, decentralized decision-making structure supports a “culture of reform”.


III. Timing:

Reform takes time and involves risk. Reform is neither easy nor quick: many reforms require years of work before producing measurable results.

- Patience and perseverance are two of the strongest assets of reform.
- **Using time intelligently**: time is the most crucial resource when implementing reform. Effective reformers anticipate and make efficient use of time that is available before implementation as well as the lag between Startup and initial outcomes.

Always it is better to allow for additional time up-front than to rush into implementation.
• **Taking Risks:**

- Change process often extends over a number of years and this can be stressful as individuals and organizations in struggle to adopt new strategies.
- When risks are high, the pressure to produce results can be overwhelming, however, expecting results too early can be a prescription for failure.
- Reform is a process of trial and error and during initial implementation corrections are common.
• **Taking Risks:**

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IV. Training

- Education reform often requires fundamental changes in individuals’ roles and responsibilities.

- All individuals must have the skills that would enable them to support reform objectives.

- Ideally, the training occurs before program implementation.

☐ Changing roles and relationships:

■ The biggest challenge is putting reform elements into practice.

☐ Adopting training strategies: planning, management, technical, financial, M&E.
IV Flexibility:

- Central to successful implementation

- Selecting a strategy:
  - Piece-meal, incremental...centralized, systemic, adaptive.

- Accommodating multiple solutions.

- Phasing in Reform.

- Adapting to the unexpected (change in political environment, fiscal resources...).
IV: Infrastructure
Reform may require redesigning organizational infrastructure

- Recasting institutional structures and relationships with proper communication strategies.

- Relating to the stakeholders, communities and donors.
VII. Managing Resources:

- Fiscal
  - Human Resources (Training and skills development, Hiring new staff, Incentives).
  
  - Funding reform
  - Reallocating resources
VIII. Monitoring and Evaluation:

- Maintaining reform in an evolving climate
- Using M&E for program improvement.
The most important management processes for implementing education reform are:
  ● Planning and decision making;
  ● Leadership.
  ● Communication
  ● Coordination.
  ● Resource mobilization (political, financial, managerial and technical)
  ● Monitoring and Evaluation;
Management of reform

- Building Institutional Capacity
  - Developing a plan for change.
  - Identifying “change agents”
  - Recognizing barriers to change
  - Building support for reform.
  - Reforming organizational structure
  - Mobilizing resources
  - Consolidating change: capitalize on easy, quick wins early
Managing the change process

- Provide help to face up to change
- Avoid over-organizing
- Communicate like never before
- Ensure early involvement
- Turn perceptions of threat into opportunity
- Work at gaining commitment

Process steps

- Preparing a sector profile
- Undertake a thorough situational analysis (Internal and external environment assessment)
- Development of the policy framework
  - Identification of core issues
  - Formulation of vision statement: Statement of the long term national goal
  - Formulation of core strategic goals: should grow out of vision (describe measurable outcomes)
  - Generation of policy options
  - Evaluation of policy options
  - Formulation of leading strategies and supporting strategies: Programs envisioned as a way of achieving goals
  - Policy drafting and consensus building
  - Policy adoption and approval
  - Dissemination and awareness

- Planning for policy implementation
- Policy impact assessment
- Subsequent policy cycles
Elements of successful policy framework
In addition to rigorous technical features

- Seek high-level political endorsement
- Define an institutional anchor early on in the policy development
- Involve stakeholders from a wide range of sectors
- Support a participatory approach to encourage buy-in and relevance of the policy framework
- Ensure adequate funding to support implementation
Framework for policy analysis
Policy definition and scope

- Policies differ in terms of their scope, complexity, decision environment, range of choices, and decision criteria.
- Four types:
  1. Issue-specific policies are short-term decisions involving day-to-day management or, as the term implies, a particular issue.
  2. A program policy is concerned with the design of a program in a particular area,
  3. A multi-program policy decision deals with competing program areas.
  4. Finally, strategic decisions deal with large-scale policies and broad resource allocations.
Framework for policy analysis
I. Analysis of the existing situation - Completed

- Demographic context
- Political context
- Economic context
- Education sector
- Dynamics of change
Example-

- **Strategic**: Should we or do we need to introduce diversified comprehensive secondary education?
- **Multi-program**: How should we allocate resources between general education, vocational education, and diversified education?
- **Program**: How and where should we provide diversified education?
- **Issue-specific**: How should practical subjects be taught in diversified comprehensive secondary schools?
Evaluation of policy options

- Desirability
- Affordability
- Feasibility
Application of the mode to Jordan’s case - HRDSIL

- Context of policy formulation
  - shortage of skilled workers coupled with a surplus of unskilled workers and academically-educated youth
  - Education system had the potential for change without major obstacles
  - The financial resources could also place constraints on education system
Generation of policy options

- Options were generated on the basis of limited data and analysis.
- Four policy options considered:
  1. Continuing the existing system of general secondary schools predominated with academic schools.
  2. Increasing the number of vocational schools and reducing the number of general academic schools.
  3. Modifying the system through introducing pre-vocational subjects at the preparatory school level, introducing a new type of post-preparatory vocational institution (the trade training centre) and introducing diversified education (combining academic and vocational courses in one institutional setting) at the secondary level.
  4. Introducing a major structural overhaul of the system, transforming schools into practice facilities where learners of different age groups would work on real-life situations and in the process contribute to economic development in the country.
Evaluation of policy options

- evaluated in fragmented and informal way.
- Option I, evaluated and rejected on desirability and affordability basis
- Option II, was rejected on affordability and desirability basis
- Option IV, was rejected on the grounds it was not feasible - synoptic and comprehensive nature
- Option III, evaluated on the basis of desirability, affordability, and feasibility and adopted.

*Incremental (low-risk) approach including pilot basis*
Planning policy implementation

-Due to its incremental approach to policy change, long run plans for the implementation were made in broad terms, leaving the detailed plans for specific projects

- Consequently, the social and pedagogical integration expected from comprehensive schools did not take place
Policy impact assessment

Performance of comprehensive secondary education was considered mix
The new policy cycle - ERfKE

- High -level political commitment
- Education within a wider perspective
  - Consultative Council and National Commission
  - National Agenda
  - Jordan 2020
  - Vision Forum
- Systemic: thorough analysis of the system with wider participation
Generating policy options

- Policy drivers: building human capital (export and competitiveness)
The policy options

- The policy options open to evaluation included: (I) maintaining the status quo, offering communities the choice of academic high schools, vocational high schools, comprehensive high schools, general vocational secondary schools (GVSSs), and trade training centers;
- (II) placing even greater emphasis on vocational education, increasing the number of vocational schools, GVSSs, and vocational tracks in comprehensive schools while decreasing the number of academic schools;
- (III) introducing incremental reform as in the past, in the form of modification of the vocational curriculum, introduction of more practical applications, etc.;
- and (IV) introducing major reforms including restructuring the system in terms of policies and strategies; reforming the curricula and examination process; integration of ICT, professional development of teachers, Pre-school education, safe school environments, creating different streams in comprehensive schools; and introducing pre-vocational courses at the preparatory level and strengthening in the curricula for all other levels.
Evaluation of policy options

- All four policy options were fully and comparatively evaluated - DCU & PSPU, NCHRD

- Options I, II, and III were rejected and option IV adopted on the basis of desirability (diversification of secondary education with open door to HE, curricula updating, affordability), affordability (high-level will, champion for reform, institutional leadership, commitment for funding), and feasibility (institutional capacity, DCU, PSPU)

- Synoptic and transformational approach to reform (systemic and comprehensive)

- The strategy and its investment program (ERfKE) illustrates the process evolved from a limited incremental approach to a comprehensive transformational synoptic approach
Comparing the two strategies

- The government took the conservative incremental approach to introducing comprehensive education in the 1990’s, in large part due to the prevailing economic situation and its low-risk approach.

- Certainly this approach to policy development proved advantageous in many respects: (a) there was no need for long-term and elaborate planning at the national level - only at the project level; (b) implementation would be relatively easy because no national or conceptual reform was involved; (c) no political mobilization or intense bureaucratic negotiations were necessary; and (d) no major institutional changes were needed to accommodate the policy modifications.

- On the negative side, because it was very 'low risk', the government was not as inclined to invest much in terms of political capital or other resources to carry it off successfully and implications for the rest of the system were not drawn.
In comparison, the second cycle demonstrates a more highly calculated, systematic and comprehensive mode of policy making. Its success depended on three things: First of all, it was reached after an exhaustive process of review, assessment, and analysis of the education system that included high level representatives from both the public and private sector. Second, even though it was comprehensive and strategic, as in the earlier cycle it also incorporated a phased implementation plan; experience in each phase was to be systematically monitored and evaluated and the results used as feedback for modifications of future phases.

Finally, the process was driven by a combination of strong political will at the highest levels, and a sophisticated, technical machineries within well-established institutional base for policy planning and monitoring and evaluation (DCU, PSPU, NCHRD) were established or reinforced.
Conclusions-Implications and considerations for preparing a sound National Education Strategy

- Policy development should be based on solid knowledge along three dimensions: diagnosis of the sector, contextual analysis, and an assessment of the interest groups.

- Before a policy decision is made, different viable policy options need to be generated and analyzed carefully.

- To address sector-wide issues in the context of political and economic demands, it is critical to start with a limited incremental phase (issue-specific) but this should succeed due time by a comprehensive strategic approach.
Whether policy reform is incremental or comprehensive its **true test** during planning and implementation.

When a policy goes into effect, it is not the end of the policy planning process, it is the beginning of a new chapter. Built-in M&E mechanisms are essential. However, *policies themselves should be allowed to mature before a judgment is passed on their impact*. Even if a policy is determined to be ineffective, it should not be allowed to linger while new policies are introduced alongside. Instead, a **new policy cycle** of rigorous planning design, formulation, and planning must be initiated.